

Purposefully automate conversations with each customer and employee.

Conducting regular audits on your Automated Brand Interaction (ABI) tool is the best way to keep track of performance and identify areas for improvement.

Here's the everything-you-need, ultimate ABI audit checklist that will help your brand ensure a VIP experience for everyone.

☐ Identify and address Answers that need attention

- ☐ In the dashboard, go to **Measure > Reports > Answer Performance Report**. Sort by Thumbs Down to find the Answers driving the most negative reviews.

*Hot tip: Keep the **Frequency** column in mind as you go—the higher the frequency of that Answer across conversations, the more pressing it is that you address the negative reviews.*

- ☐ Review the Answer's Training Questions to ensure they are still the right match for this response. Edit, delete, or move any training which is no longer a fit.

*Hot tip: You can see a holistic view of all of your Answers and their training in the Answer report, which you can download from your dashboard under **Settings > Bot Setup > Answers**.*

- ☐ You might notice that the Training Questions are beginning to include multiple intents, which need different responses. In that case, create a new Answer and move over the relevant training.

- ☐ Click on the **Conversations** tab and filter to see conversations that contain the Answer you're addressing. Review as many conversations as you'd like to understand where this Answer might not be helpful. Adjust the **Training Questions** and content of the Answer (including **Quick Reply** buttons) as needed.

- ☐ Make a note to check back in 1-2 weeks and compare the performance of this Answer since you've made your changes.

- ☐ Go to **Improve > Not Helpful** for more instances where chatters have given a Thumbs Down response to an Answer. View the conversation to evaluate if this was in fact the correct response, and update the training or the content of the Answer as needed.

*Hot tip: You might also consider adding a **Quick Reply** button on this Answer that takes the chatter directly to human support, especially if this is a high-value interaction or customer. This depends on the volume of traffic this Answer receives—adding an escalation path may have a negative impact on your containment.*

☐ Identify and address potential content gaps

- ☐ Navigate to **Improve > Unanswered** and select **Grouped** in the top right corner. This will allow you to see if there are trends in the questions that your bot hasn't been able to answer, and create new Answers as needed.

- ☐ Now, instead of **Grouped**, select **Ungrouped** in the top right corner. Delete any chatter inputs that should not be trained (i.e. order tracking numbers, gibberish, etc.)

Hot tip: See our resource on [Training Best Practices](#) to make sure you're training the most impactful questions.

- ☐ In the **Ungrouped** view, if you are surprised about any of the questions that the bot couldn't understand, click **View Conversation** for more context.

You might then add the unanswered question to the training of an existing Answer to help the bot recognize this question next time. Or, consider creating a new Answer to address this intent.

☐ Review opportunities to improve Training

- ☐ Go to **Improve > Training Similarities** to see if there are Answers in your bot with similar Training questions. Click the **Similarity** and move training from one Answer to another as needed.

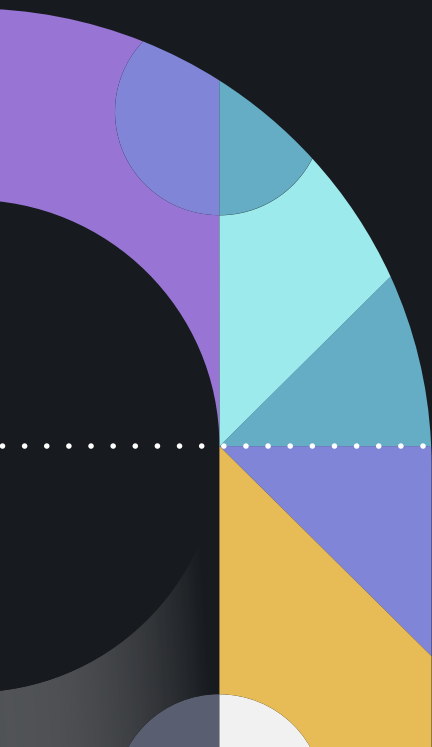
You may also find that you have two answers that address the same intent, in which case you should merge them and delete one to reduce the frequency of **Needs Clarification**. Once you are satisfied with the changes, you can go back to the **Training Similarities** page and click **Resolve**.

- ☐ Go to **Improve > Clarifications** to see if there are any questions that you can train to Answers you've already built. Delete questions that shouldn't be trained to an Answer.

☐ Identify and action opportunities to increase containment

- ☐ Go to **Measure > Reports > Answers Resulting in Handoffs**. Sort by **Total Handoffs** to look at the most common drivers of handoffs to your human team. Some Answers will always require a handoff to a human, either because they are complex or a revenue-generating opportunity for your brand. However, Answers that are undesirable for a human to resolve are worthy of your attention here.

- ☐ Review the Answer's **Training Questions** to ensure they are still the right match for this response. Make sure the answer does not have a **Quick Reply** button that offers escalation. Edit, delete, or move any training which is no longer a fit.





Identify and action opportunities to increase containment cont'd

- ☐ If necessary, create a new Answer to address unique questions that have been captured by the original Answer's training.
- ☐ Go to the **Conversations** tab and filter to see conversations that contain this Answer. Review as many conversations as you'd like to understand where this Answer might not be helpful to the chatter. Adjust the **Training Questions** and content of the Answer (including **Quick Reply** buttons) as needed to reduce unnecessary handoffs.

☐ Audit 20 randomly selected conversations for adhoc insights

- ☐ Check the **Conversations** tab and review a set of engaged conversations. Click **Add Filter** and under filter type, select **Engaged** and then click **Apply**.
- ☐ If you're collecting CSAT, you can add the **Satisfaction Rating** filter as well. This exercise should give you a sense of the bot's overall performance and highlight any patterns of friction or points of frustration for your customers.

☐ Identify trends in customer needs with Conversation Topics

- ☐ Use **Conversation Topics** to track keywords you define so you can easily access the information later.

☐ Review and optimize campaigns with A/B tests



- ☐ If you're running campaigns, check your **Goals and Events** report under the **Measure** tab to see how it is performing.
- ☐ If performance isn't where you want it to be, try A/B testing different variations and see what works (ask your CSM about getting this feature).




☐ Confirm accuracy of most popular Answers

- ☐ Under **Measure**, check your **Overview** tab to see what some of your most popular answers are. Make sure those answers are up to date.

Ada is the leading technology provider of Automated Brand Interactions, empowering the world's fastest growing companies, like Zoom, Facebook, and Square, with best-in-class solutions that deliver digital-first, omni-channel experiences at scale.

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