



intelligaia

CX Design and Innovation



# Standard Guidelines for Dialog Creation

An Implementation Guide

# Why do we need standard guidelines for dialog creation?

Successful dialog communication is based on a few basic guidelines that people usually apply spontaneously, which describes how people communicate effectively and act cooperatively, providing the right contribution to allow a frictionless conversational flow.

The guidelines have been synthesized from research papers, articles and posts, apply to a wide range of AI products, are specific, and are observable at the UI level.

# Useful Guidelines to create more natural conversational flows and improve the customer experience

The guidelines are grouped into four categories that indicate when during a user's interactions they apply.



## Initially

These guidelines are related to initial engagement with the system.

### 1. Make clear what the system can do

Help the user understand what the AI system is capable of doing. Set expectations right at the beginning.

#### *Example application*

*Provide explanatory text and display suggested topics that help understand the feature's capabilities.*

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## 2

## During Interaction

This subset of guidelines is about context; whether it's the larger social and cultural context or the local context of a user's setting, current task, and attention.

### 1. Time services based on context

Time when to act or interrupt based on the user's task and environment.

### ***Example application***

*Provide timely guidance and present suggestions/recommendations when required.*

### 2. Show contextually relevant information

Display information relevant to the user's current task and environment.

### ***Example application***

*Show things that go with the task. Show information and associated choices to move towards goal completion*

### 3. Match relevant social norms and mitigate biases

Ensure the experience is delivered in a way that users would expect, given their social and cultural context. When AI systems take proactive action, ensure the AI system's language and behaviors do not support undesirable and unfair stereotypes and biases.

#### **Example application**

*Use a semi formal voice to talk to the user. Encourage user and converse as a human.*

*Applaud user for completed task*

*Find out if the user requires help with anything else*

### 4. Provide only the necessary information

Be concise!

#### **Example application**

*Show essential information for selection/input. Write just what users need in order to accomplish their goal, receive what they require or solve their problem.*

### 5. Do give users the possibility to ask for more information

#### **Example application**

*Ask the user what he/she would further like to do with a particular task. Try asking explicitly or by requesting the user to click on a selection to proceed in the conversation.*

### 6. Be clear

Choose words carefully to avoid ambiguity.

#### **Example application**

*Explain to user at all stages what the bot is doing and what they should expect next.*

# 3

## When Wrong

Most AI services have some rate of failure. The guidelines in this group recommend how an AI system should behave when it is wrong or uncertain, which will inevitably happen.

### 1. Support efficient correction

Make it easy to edit, refine, or recover when the AI system is wrong.

#### *Example application*

*Present edit ability using text like 'Tap to Edit'.*

### 2. Scope services when in doubt

When the system is uncertain, build in techniques for helping the user complete the task on their own.

#### *Example application*

*The AI system can gracefully fade out, or ask the user for clarification. Use sentences like 'Can you provide more clarity for---'*

### 3. Make clear why the system did what it did

Enable the user to access an explanation of why the AI system behaved as it did.

#### *Example application*

*Provide explanation as sub text information. For example; "The route chosen by the app was made based on the Fastest Route".*

# 4

## Over time

These guidelines remind us that AI systems are long term investments and need careful planning for improvements.

### 1. Encourage granular feedback

Enable the user to provide feedback indicating their preferences during regular interaction with the AI system.

#### *Example application*

*Encourage feedback on each suggestion by asking “Is this helpful?”.*

### 2. Convey the consequences of user actions

Immediately update or convey how user actions will impact future behaviors of the AI system.

#### *Example application*

*Use phrases like “Doing this will lead to....”*

### 3. Provide global controls and notify users about change

Allow the user to globally customize what the AI system monitors and how it behaves.

#### *Example application*

*Inform the user when the AI system adds or updates its capabilities.*

## Shaping a Creative and Conversational Approach

Creating a Chabot that simply informs and collects data does not succeed in sustaining user interest long enough to accomplish the goal. Here a few indicators for shaping the conversation:

## Call To Action (CTA)

The conversation should always feel that the reader is chatting with a human by making it believable and engaging. Use short, casual responses.

## Creating Good Utterances

This is what the user is typing or selecting as an action and in the utterance there is hidden intent. These are user inputs that the chatbot needs to understand.

Consider the following pointers when creating utterances manually:

Create utterances of different different lengths; short, medium and long sentences

Change the words and length of phrases

Vary the placement of the entity. It can be placed at the start, middle or end of the utterance. This will allow the bot to better understand the context in which to expect the entity.

Mix the grammar up

Pluralization

Stemming

Punctuation; use punctuation in some instances, not in others. Anticipate the way the audience might speak.