

Bot Development Canvas

Designed by *Prefer Marketing Dept*

Designed for *BankExample Contact Centre*

Date

Version

Objective

Describe your bot's objective using S.M.A.R.T. terminology.

- Specific
- Measurable
- Achievable
- Relevant/Realistic
- Time-Bound

In a year answer 25% more queries in relation to customer services without human interaction

User

Describe two of your users' demographics, technographics, motivations, frustrations and influencers.

Stay at home parent
-time poor because of 2 kids
-cost sensitive because of only having one income
-smartphone and home computer
-uses facebook and instagram

Small business owner- Tradesman
-always driving to a job
-careful with finances
-smartphone usage
-time poor
-occasionally uses facebook















Inclusions

What will be part of the project.

- budget tracking
- loan status reports

Channels

What channels are you planning to use and what are their addresses.

 /BankExample	 bankexample.co.nz	 0800 000 000
 -----	 -----	 -----
 -----	 -----	 -----
 -----	 BankExample App	
 -----	 RCS -----	
 -----		

User intentions

Describe what your users want to achieve using the following structure:
"As a <channel> user I want to <objective> so that <reason>."

- As a app & website user I want to be able to Direct Debit into my account so that I can save time
- As a app user I want to be able to block a lost card so i can save time going into the bank
- As a website & app user I want to be able to request information about a transaction so that I am informed about my transactions
- As a facebook & website & app user I want to be able to check my balance so that I know how much money I have at all times
- As a facebook user I want to be able to notify the bank that I am going overseas so that the bank doesn't mark my transactions as fraudulent
- As a website & app user I want to be able to flag suspicious transactions so that I feel secure
- As a facebook user I want a notification when my bank statement is ready so that I know when I can view it
- As a facebook & website & app user I want an ATM map so that I know the most convenient location to get cash

Exclusions

What will not be part of the project.

- Loan applications
- mortgage
- credit card

Explore budget

What is the financial benefit if the bot's objective is achieved.

current calls =10,000/month
25% objective
25% of 10,000 calls
= 2,500 to be converted

\$4/call
\$4 x 2,500
= \$10,000 saving per month
=\$120,000 saving per year

Expectations

On a scale of one to five set the expectations you have for the characteristics of your bot, following the expectations framework.

- | | |
|---|--|
| Understanding
<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> | understands basic english |
| Answering
<input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> | understands context and an answer as such |
| Navigation
<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> | allows users to navigate using predefined commands |
| Error handling
<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> | gives options for users to choose from when erroring |
| Intelligence
<input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> | can remember basic details about user |

Data

Where will you get the required data, and what datapoints do you need from your users.

bank crm system
-name
-bank account number(s)
-transaction history
-number of cards (and status)
login security
current location
username
bank account number(s)