



How to evaluate a  
Conversational AI solution

# Buyer's Guide



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# Introduction

## How to Evaluate a Conversational AI Solution

When evaluating a conversational AI solution, it is important to ensure that the solution meets certain key criteria, particularly the critical capabilities required to meet your organization's needs. This guide gives you the must-have features and capabilities to look for when evaluating a conversational AI solution, including the five most common problems and the four most important questions to ask when creating an RFP for your organization's use case. In addition, the guide describes the real-world benefits that can be attained from a conversational AI solution, the potential pitfalls to avoid, and expert tips for successful implementation.

## Five most common problems

Forewarned is forearmed: These platform weaknesses can undermine the success of your conversational AI effort

Although conversational AI offers significant benefits, not all conversational AI solutions are created equal. Understanding the problems associated with conversational AI systems can help you make informed decisions during the selection process. To weed out the less capable solutions, learn whether a solution has the following weaknesses:



**Limited context understanding.** Conversational AI systems often fail to retain or understand context, leading to irrelevant or repetitive responses. For instance, if a user provides information in one message, the virtual agent might not use it in subsequent interactions.



**Over-reliance on predefined scripts.** Scripted virtual agents often fail when faced with queries outside their programmed responses. This leads to user frustration and reduced satisfaction.



**Lack of personalization.** Generic responses can make interactions feel impersonal, reducing user engagement. Conversational AI systems often fail to tailor responses based on user preferences or history.



**Security and privacy concerns.** Handling sensitive user data without adequate security measures can lead to breaches and loss of trust.



**Inability to handle complex queries.** Many conversational AI systems struggle with multi-part questions or tasks that require complex reasoning. This can result in incomplete or incorrect responses.

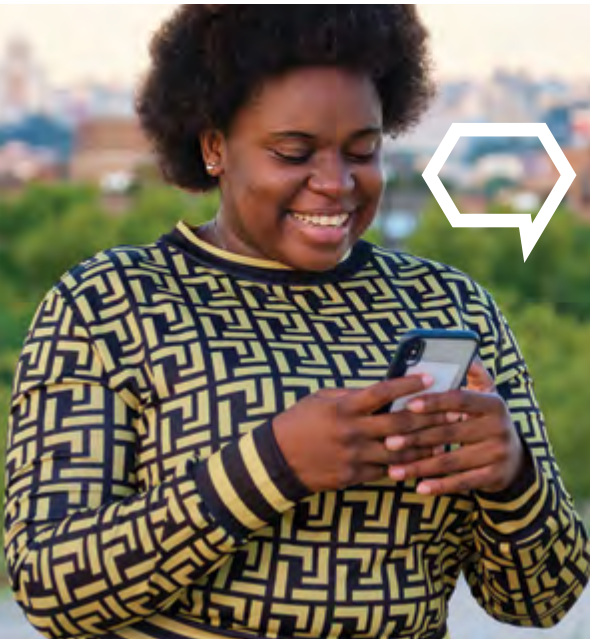
# Benefits of Conversational AI

A host of productivity and cost-saving benefits are yours to gain through conversational AI

Conversational AI is a strategic asset that drives value across external customer-facing and internal worker operations. Conversational AI enables businesses to achieve greater efficiency and satisfaction by enhancing the customer experience, reducing workloads for support teams, and empowering employees with intelligent tools.

The operational and cost-saving benefits that an organization can gain from implementing conversational AI include:

- ✦ 24/7 Availability and instant responses
- ✦ Personalized customer interactions
- ✦ Multilingual support
- ✦ Scalability during peak demand
- ✦ Faster onboarding and training
- ✦ Real-time assistance for agents
- ✦ Streamlined knowledge management
- ✦ Cost savings



## Pitfalls to avoid

Learn before you leap: Reduce risk and ensure success by following these best practices

Awareness of the pitfalls that can undermine a conversational AI implementation will enable you to avoid costly mistakes and a failed implementation. Careful planning, adhering to best practices, and working with a leading vendor will enable you to avoid the following pitfalls:



**Overlooking security:**

Failing to prioritize security can lead to data breaches.

**Lack of clear goals:**

Implementing AI without a defined purpose can result in wasted resources.

**Underestimating training needs:**

AI requires time and data to learn and perform effectively.

**Ignoring user feedback:**

Neglecting feedback can hinder continuous improvement.

**Poor integration:**

A lack of integration with existing systems can limit the AI's effectiveness.



## Seven key capabilities

### The core capabilities that define a leading conversational AI solution

Conversations with customers are rarely linear, and businesses operate in dynamic environments in which information changes frequently. A conversational AI solution should have strong topic-handling capabilities to navigate conversational shifts and provide smooth and natural interactions. To maintain high levels of security, a conversational AI solution should implement encryption, access controls, and anonymization techniques to protect user data and maintain compliance with regulatory standards. You also want to ensure that your conversational AI system does not provide inaccurate or inappropriate responses.

To find a solution that can meet these critical criteria, determine whether the solution has the following 7 key capabilities:



# Four questions to ask in your RFP

The critical questions that will help you select the strongest conversational AI solution

Selecting the right conversational AI platform is a complex process that requires careful evaluation of vendor solutions to determine how closely its features and capabilities meet the needs of your organization. A leading conversational AI solution will have some fundamental capabilities. Asking the following four questions within an RFP will help you determine whether a vendor's solution has these core capabilities:



How does your solution maintain context while handling complex, multi-topic conversations?



What measures are in place to ensure both customer and enterprise data security?



How do you define and measure the success of AI Agents?



How can customers measure the performance of my agent, and use this information to improve it over time?

## Tips and Advice

# Deployment wisdom from experts in the field

Lessons learned from expert providers and prior customer deployments can help you avoid the pitfalls others have experienced. The following is a collection of hard-earned wisdom and best practices to incorporate in your upfront planning and ongoing operations to ensure the success of your conversational AI deployment:

1

**Define clear objectives:**

Identify specific problems and goals for the AI solution.

2

**Invest in training:**

Provide ample training data and resources for optimal performance.

3

**Monitor performance:**

Regularly review KPIs and fine-tune the AI.

4

**Prioritize user experience:**

Ensure the AI delivers intuitive and user-friendly interactions.

5

**Collaborate across teams:**

Involve IT, marketing, and customer service teams in planning.

6

**Plan for scalability:**

Ensure the solution can grow with your organization.

## Conclusion

The right conversational AI solution can give your business a brighter future

Selecting the right conversational AI solution can significantly impact your organization's efficiency and customer satisfaction. It can also impact your bottom line. By understanding your needs, asking the right questions, and focusing on key capabilities, you can make an informed decision that yields measurable results.

As conversational AI continues to evolve, its potential applications and benefits will only expand. Advancements in natural language processing, machine learning, and sentiment analysis promise even more intuitive and human-like interactions. For businesses, this means greater opportunities to gain a competitive edge, build lasting customer relationships, and empower their workforce.





To learn how you can gain all the operational and cost-saving benefits of a state-of-the art conversational AI solution, [speak with the boost.ai experts today.](#)

# About boost.ai

Boost.ai delivers AI that makes the human connection better, built by and for real people and real interactions. Our platform features sophisticated technology that seamlessly blends conversational and generative AI, enabling deeply personalized and outstanding customer experiences. With low-code solutions that plug right in, boost.ai is ready to support today's needs - and built to scale for tomorrow's growth. Unmatched security features ensure reliability for the world's biggest and most regulated brands across financial services, insurance, and more. boost.ai is recognized in Gartner's 2023 Magic Quadrant™ for Enterprise Conversational AI Platforms.

