

Conversational design vol. 3

Avatars

Considerations, approaches
and recommendations for
virtual agent avatar design



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Cameron holds a Doctorate of Linguistics from Cambridge University and, as a Gates Scholar, has a deep understanding of the mechanics of language, writing a Ph.D. comparing the syntax of irrealis mood in the Romance languages.

Today, Cameron leads boost.ai's interaction design strategy, coordinating and spearheading research that produces data-driven insights.

This helps to improve our understanding of how to enhance communication and user experience in task-oriented conversations with intelligent virtual agents.



As consumers become increasingly comfortable with [artificial intelligence in a customer service setting](#), conversational AI is expected to save key sectors - including banking, healthcare and retail - [\\$11 billion in annual cost savings](#) and over 2.5 billion customer service hours by 2023.

Gartner reports that it has seen [a greater than 160% increase](#) in interest from companies around implementing conversational AI solutions.

We are on the cusp of [a human-machine collaboration boom](#) thanks to artificial intelligence, with virtual agents and conversational AI very much at its center.



Chances are that if your business hasn't yet deployed a virtual agent to help streamline customer service, support or sales, it's only a matter of time before you take the plunge.

The next step, therefore, comes in figuring out how to position this new artificially-intelligent employee so that customers see it as a true embodiment of your brand and not as a tacked-on afterthought.



A key step towards successfully launching your virtual agent is designing a suitable avatar.

First impressions matter and a well-thought-out avatar allows you to decide how you want customers to perceive your virtual agent before they begin interacting with it.

In this guide, we will explore a variety of approaches to avatar design based on trends we have seen emerge among our client base and our research into human-machine interaction.

Avatar design is a complex process that should take into account a number of factors such as market research, existing branding, customer expectations and more.

Scientific research shows that avatar design choices have specific effects, but the design choices that you make should be based on your specific goals.

Workshop it!

Get the relevant stakeholders together and hold workshops to iron out exactly what you want (and need) in an avatar.

For ideas about workshopping your virtual agent avatar, talk to your AI supervisor at boost.ai.

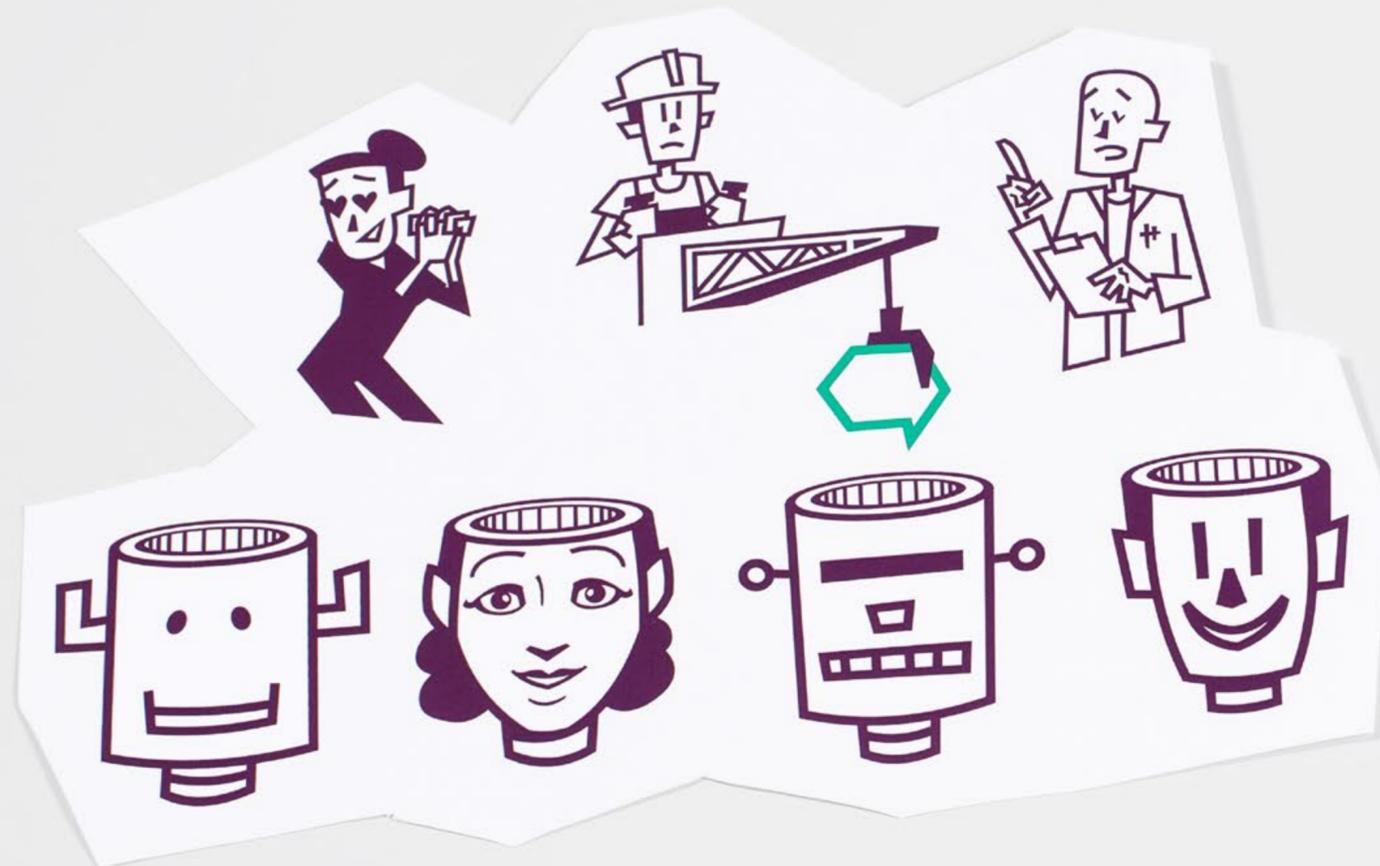


Chapter 1:

Your avatar, your choice

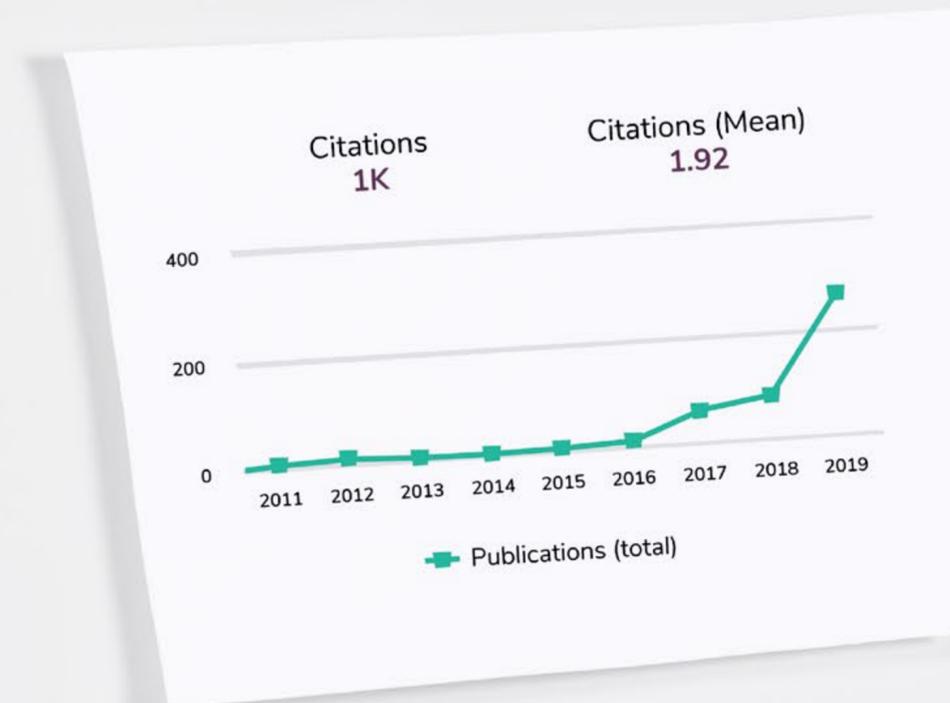
Conversational AI is a nascent field that is rapidly evolving.

While we have seen an [explosion of whitepapers and think pieces](#) on the subject over the past few years, detailed research into [the impact of avatars as social actors](#) suggests that we don't necessarily understand how this translates to the latest advancements in conversational AI technology.



Avatar [**av**-uh-tahr, av-uh-**tahr**]

Digital Technology. A static or moving image or other graphic representation that acts as a proxy for a person or is associated with a specific digital account or identity, as on the internet.



What is key to remember, however, is that as your virtual agent project continues to grow, and customers become accustomed to interacting with you through this new channel, it will become an integral part of your organization's identity.

Taking ownership of avatar design in the early stages of development is, therefore, crucial to ensuring that it aligns with existing branding guidelines.

We advise our clients to work closely with their in-house marketing teams and designers (the more the merrier) or engage in user research that can provide insight into the customer base demographics, and tailor design decisions to suit this data.





Obtaining ‘buy-in’ across all relevant departments of the organization should also be a consideration.

The contact center teams and AI trainers who will be working closest with your

virtual agent can have equally as valuable input as the CEO or project leader.

Across hundreds of successful implementations, we have seen that a virtual agent can quickly become accepted by employees as “just another member of the team”

and tapping those same staff members to help bring the project to life can often help to ease the transition.

This works both ways - as a well-designed avatar can be used as a guideline to help the AI Trainer team keep the tone of voice and experience consistent.

Set expectations

Part of the avatar design is also about establishing expectations - so the look, placement and description of the VA which includes the avatar will impact this. A good first impression can matter just as much with virtual agents as it can with humans, and while this is something that is normally taken into consideration when designing greeting messages and proactive conversation flows, it should be equally considered in terms of avatar design.

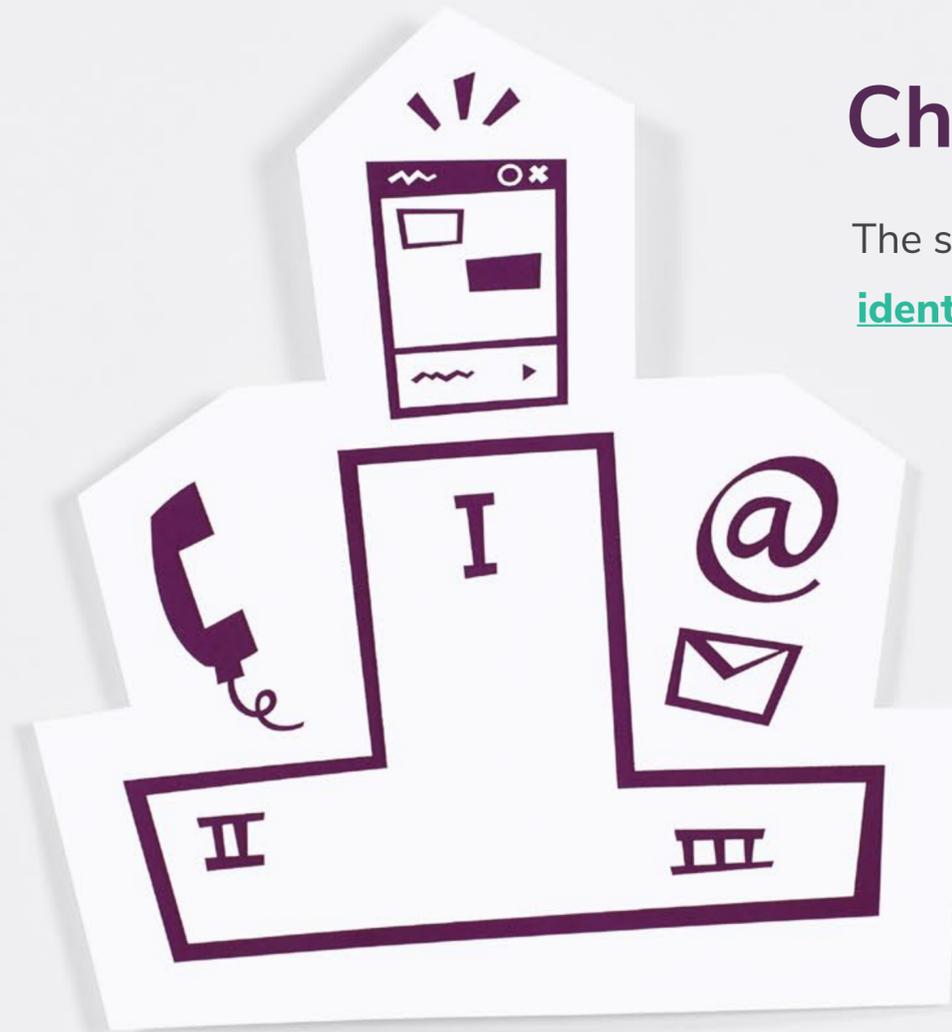


The trend of where to put an avatar on a website tends to favor placement in the lower-right corner.

This may be due to many websites not placing important information in this area, as opposed to the top navigation bar that normally contains a lot of options.

This may also be a nod to computer operating systems (i.e. Microsoft Windows) that often have shortcuts to system settings in the lower-right corner.

In practice, avatar placement does not need to be restricted by these conventions and you should consider what works best for the user experience you wish to create.



Chat-first

The speed and convenience of the chat channel has been [identified as desirable among millennials](#), who prefer it over phone and email.

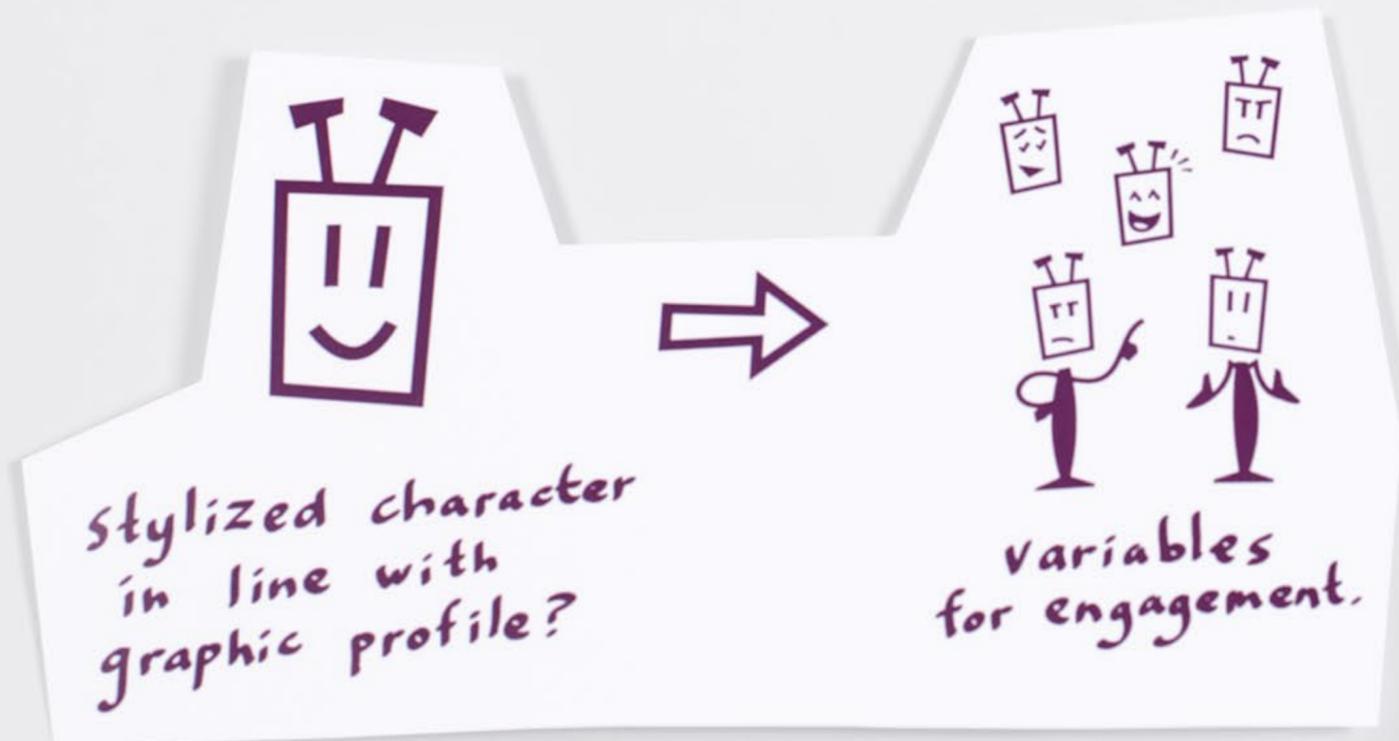
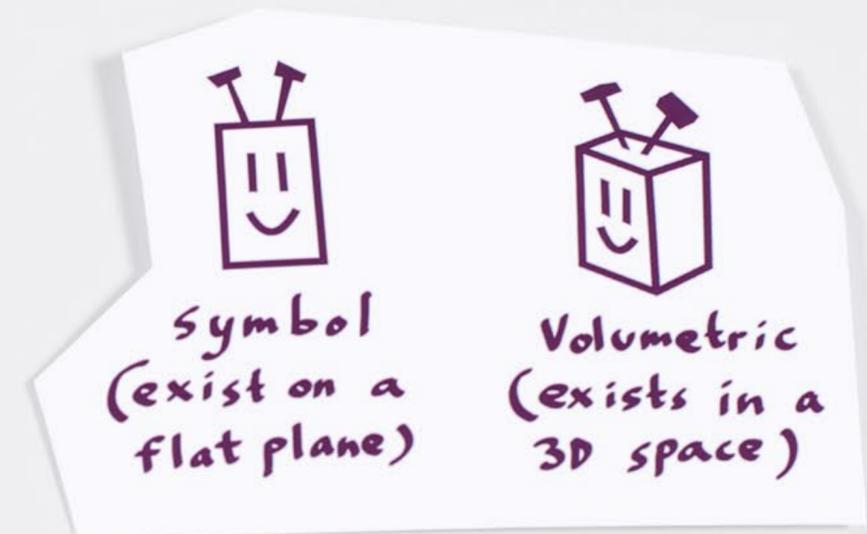
Amongst our clients who have adopted a ‘chat-first’ strategy (in which a virtual agent is presented as the principal channel of contact), we have seen increases in traffic and CSAT scores, with one major Norwegian bank reporting [3 out of 4 customers favoring to talk to its virtual agent](#) over a human representative.

A lot of the mythology (for lack of a better word) surrounding artificial intelligence centers around futuristic humanoid robots derived from science fiction.

It is, therefore, no surprise that some consumers may expect a virtual agent to do more than it is actually designed to, based on their impressions of robots from popular culture.

Breaking away from common sci-fi tropes (i.e. avoiding calling your virtual agent HAL 9000 and using a glowing red light as an avatar) can help to better set up expectations for what customers will get out of the experience before they even open up the chat window.





Another point to consider is how the avatar's functionality will inform its design. Whether you decide on a basic icon or a full character viewable from multiple angles, it depends on how you expect customers to engage with it.

Think about whether the avatar will exist outside of simply being a chat icon and try not to limit its design so that it can be used in the future for external marketing purposes.



These are four categories of avatar.

People often ask which one they should choose to represent their virtual agent but there is no right answer.

Each category brings with it end-user expectations that may or may not align

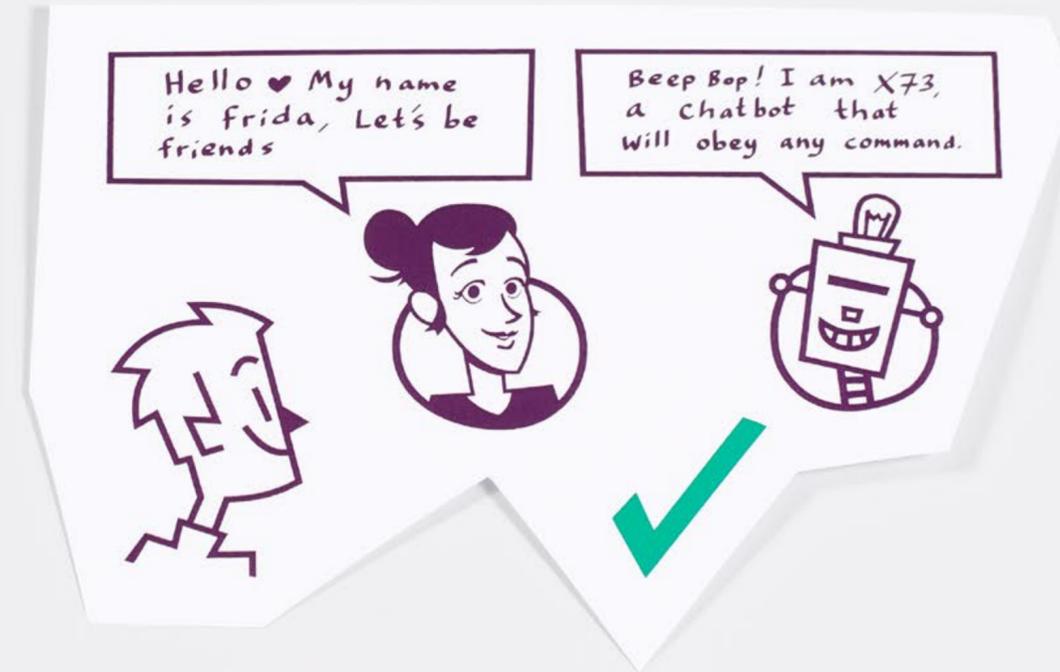
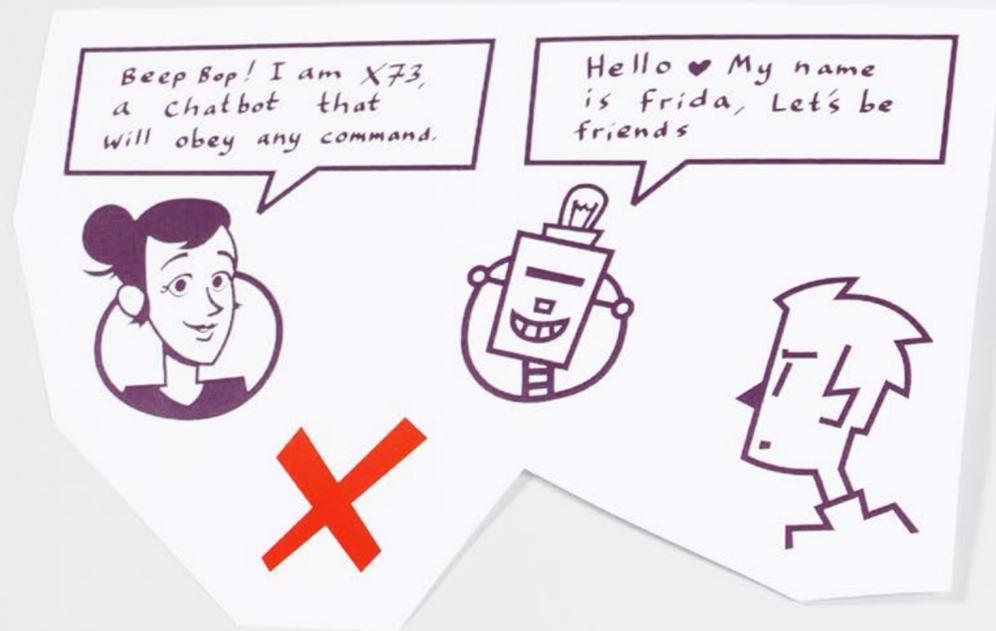
with your business goals and are subject to change over time.

Instead, consider what you would expect from each of these if you were to have a conversation with them?

These expectations will give you a sense

of what a customer may feel when encountering your virtual agent.

Align with your marketing team and 'customer persona', and be sure to test the design with customers to learn from them if it has the desired effect.



[In research conducted by SINTEF](#), it was observed that how a virtual agent looks - while still important to a user's overall impression of the interaction - did not rank as high when compared to how polite it is or how good its conversational skills are.

Our recommendation is to avoid creating a jarring experience between how your virtual agent looks and how it communicates.

It's important to make sure that there is a clear correlation between

these two aspects so that customers aren't surprised once they begin chatting with your virtual agent after expectations are set by its avatar.

Trust in design

Establishing trust between customers and your virtual agent is key to leaving them with a positive lasting impression of your brand. While a lot of the work in building trust is done via the dialogue interactions a customer has with the virtual agent, how it looks can also play a part.

Trust is an attitude that relies on how humans perceive certain characteristics such as ‘credibility’. This presents a major challenge when it comes to building trust with a virtual agent because the credibility of said virtual agent is based on how the user perceives or evaluates its credibility, not its inherent qualities.

The literature on interpersonal trust between humans also shows that trust relations are dynamic and vary over time.

A study by SINTEF that tries to establish what makes users **trust a virtual agent in a customer service setting** points out that, while research is lacking on factors directly contributing to trust between users and virtual agents, cues can be taken from the broader relationship between users and general automation.



Based on this study, we can offer some guidelines on what factors to consider when trying to establish trust through avatar design:

- How often do users need to repeat themselves because a virtual agent doesn't understand them?
- **Is the information a virtual agent provides reliable and current (or is it stale like a website)?**
- How is the quality of the information provided by the virtual agent - good, useful or just filler?
- Is the virtual agent being deceptive - either about its robot-ness or any of the information it presents?
- Does the user get the sense that the bot is there to manipulate them in some way or is it clearly an efficient and helpful tool?



Injecting personality

Multiple sources suggest that developing a personality is important for developing a good virtual agent.

However, at boost.ai we believe this to be a vague evaluation that is not robust enough for us to base design recommendations.

Research shows that humans are subconsciously inclined to apply social rules (like politeness and reciprocity) when interacting with computers.

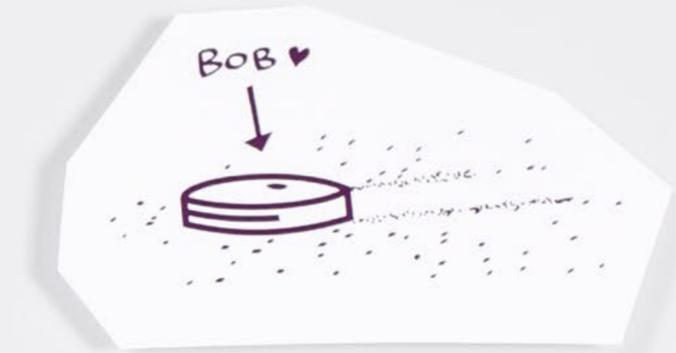
This may be where the assumption that a virtual agent needs a complex, human-like avatar and personality in order to improve the customer experience stems from.

In reality, there is actually no strong evidence to support this.



What we, instead, choose to advise our clients is that matching your virtual agent's visual personality with the personality it portrays during an interaction should be a common consideration in the avatar design process. If your company is a youth-oriented telco targeting

millennials, then your virtual agent and its avatar should be in sync with this demographic. Similarly, if your virtual agent is providing critical information around a local government's COVID-19 response, it should look and respond appropriately.



What's in a name?

Coming up with a catchy name for your virtual agent may be a good way to help customers form a bond with it.

Research into [robot vacuum cleaners](#) found that people who named their vacuum cleaners felt an increased emotional attachment, heightening their enjoyment for cleaning.



Chapter 5:

Rules of engagement

Once you have established a look and personality for your avatar, another method to potentially increase its appeal is to include an interactive element.

A study published in the journal 'Computers in Human Behavior', suggests that users [confronted with a chatbot with a human-like avatar](#) reported being disappointed when they discovered that they were unable to interact with it.

While an interactive avatar may not be appropriate for every use case - either due to branding or resource constraints - we have seen several examples of interactivity/engagement among our client base.

A prominent Nordic energy company redesigned its virtual agent's avatar to incorporate an animation that allows it to wave at users who idle on its homepage, attempting to draw their attention.



The Norman Nielsen Group notes that beyond just looking pretty, appealing visual design can help to [increase usability, strengthen brand perception and elicit positive emotions in customers.](#)

Focusing on designing an avatar that looks good also stands to make the user feel good in the process.

Similarly, a virtual agent's avatar can be combined with proactive functionality (as outlined in more detail in our guide, '[Conversational Design vol. 2: Visibility](#)') to create a more dynamic experience.

This can be an effective method to drive interaction and be as simple as opening up the chat window, unprompted, to offer advice or information related to a specific page that the user is viewing.



Check out our other guides

- Conversational design vol. 1 - [Interaction](#)
Using data-driven insights to build a better user experience for your virtual agent
- Conversational design vol. 2 - [Visibility](#)
How to maximize user experience for your virtual agent
- 5 essential steps to enhancing customer interactions with conversational AI
- Conversational AI trends in customer service: 2020 and beyond
- How conversational AI can significantly improve customer experience in the financial services industry





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