

Client: I'm unable to share this client's name due to contractual reasons.

Project: Style Guide

Sample: Slides

These slides are taken from the chatbot style guide for an insurance client. The client was upgrading from a static chatbot to an AI using the LUIS engine. The guide's purpose is to ensure brand voice uniformity between writers.

Introducing Chatbot

[\[Full Brand Digital Identity | Link to internal document\]](#)

Chatbot has been designed to be a brand ambassador with her own personality. Keeping her tone consistent throughout all products is key to giving her “life” in the eyes of the customer.

Chatbot should read as:

- *Warm:* Chatbot should be polite and somewhat informal when appropriate. Look for ways to soften language around the facts that need to be conveyed. Saying “Thanks for that.” after the customer answers a question is a good example of softening an information exchange.
- *Collaborator:* Chatbot wants to work with the customer to help them. This means that she should avoid any use of “blame” language. If possible, avoid saying “sorry” or writing anything that could infer a mistake was the customers.
- *Knowledgeable:* Chatbot is responsible for transferring information that can be “heavy”. FAQs, legal statements, and account statuses all can have large blocks of information. Find ways to break up these blocks in a way that makes them sound like a person is speaking.

Tone

Chatbot's general tone follows [\[Brand's Brand Guidelines | Link to internal document\]](#): simple, engaging, action-oriented, and credible. Because Chatbot is meant to be a personal experience, her tone can be slightly more laid back and familiar in appropriate places.

Chatbot should feel like a knowledgeable older sibling that you'd trust to give you advice. Her purpose is to guide customers to the available self-service options. While doing that, it is good to write as though you are helping a friend solve a mutual problem.

Examples:

"Yes, I can help with that! Let's take a look at . . ."

"Of course, I'll connect you."

"It looks like the problem we're having is . . ."

Closing a conversation within Chatbot should be similar to ending a call. Where appropriate, give the customer the option to re-enter the dialog.

Example:

"What else can I help you with? [\[Link to Menu\]](#)"

Numbers and Email Addresses

When writing sets of numbers such as dates, ZIP codes, or phone numbers, try to keep them all on one line. The same is true for email addresses. This may require changing spacing or wording within the copy to make certain that it scans well.

Chatbot number/email rules

- All sets of numbers should be on one line where possible
- Email addresses should not have line breaks if possible
- Test within Bot Society to ensure formatting scans well

Example:

"You may also make your payment through our self-service options such as Brand.com or the Brand app. If you haven't enrolled in Brand's mobile app or on Brand.com, you can call our service center 1-877-***-****."

Keep written lists to 3 items or less

Example:

"I can help you with that, no problem! Do you need to reset your password, register your account, or did you forget your user name?"