CONVERSATIONAL DESIGN IN THE AGENTIC AI ERA

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HI, I'M YENNY!

- **VP Product at charles**, Whatsapp conversational AI platform that attracts, converts, services, and retains customers via AI agents and marketing automations.

- Before joining charles, Yenny led engineering & product teams at Rapid, where they focused on **API Devtools**, at Rasa in the field of **Conversational AI**, and at Yelp within the **Adtech** space.

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OUR MAIN FOCUS FOR TODAY

1. Conversational **shopping** experience with Agentic AI
2. The 5 takeaways for designing **in-conversation** experience
3. The 5 takeaways for designing **platform** user experience

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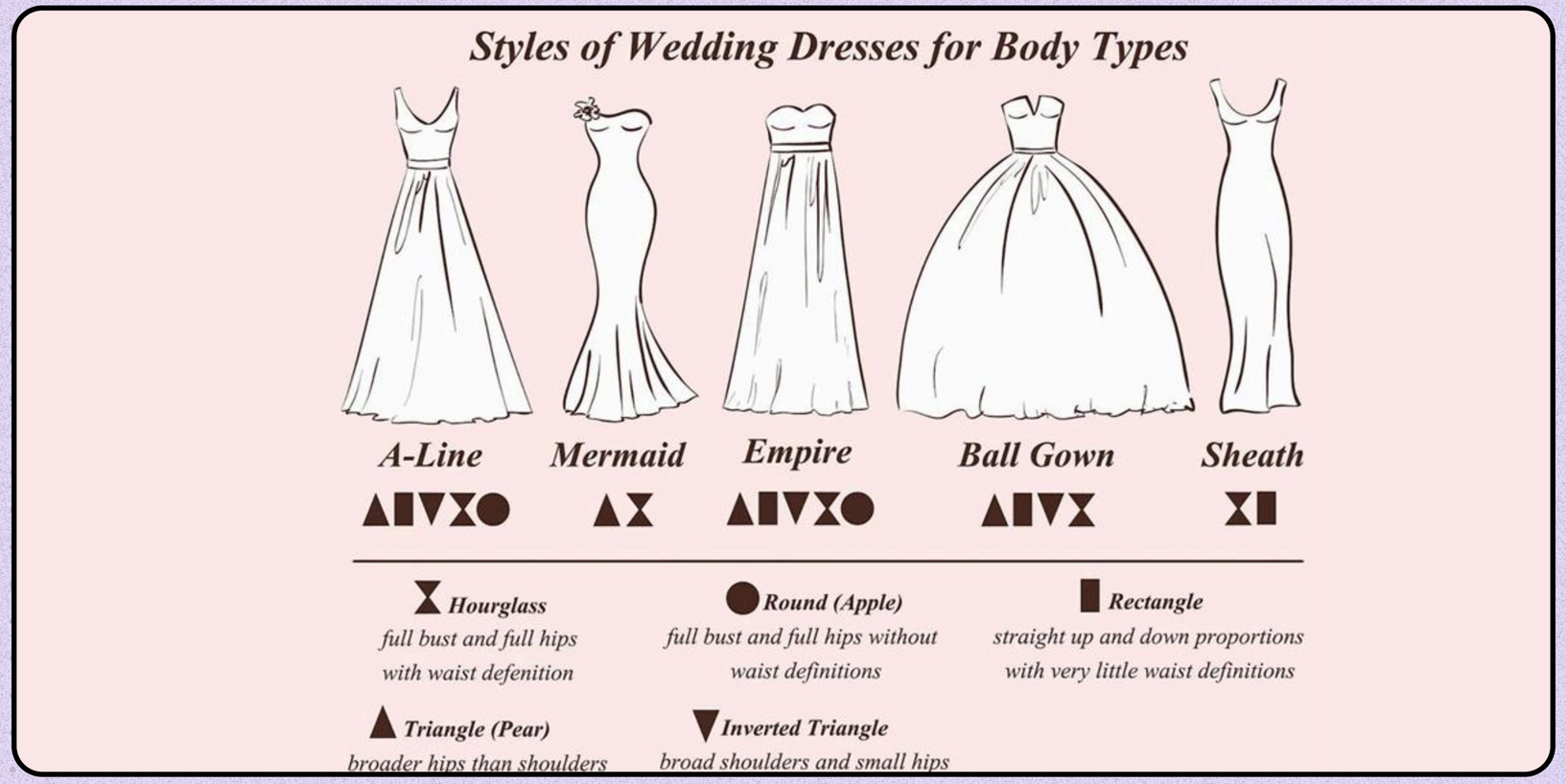
BRIDAL SHOPPING:
MY BEST SHOPPING EXPERIENCE



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HOW DO WE TURN THIS PERFECT SHOPPING EXPERIENCE CONVERSATIONAL?

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5 TAKEAWAYS IN DESIGNING IN-CONVERSATION EXPERIENCE

- Hyper-personalized
- Don’t ask your users what they want
- Meet your customers where they are
- Timely engagement
- Valuable insights from conversations

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5 TAKEAWAYS IN DESIGNING IN-CONVERSATION EXPERIENCE

Hyper-personalized

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HYPER-PERSONALIZED

How much do you know your consumers?

KNOW YOUR CUSTOMERS

- Integration with CRMs
- Integration with Shop Systems

MAKE USE OF 0 OR 1-PARTY DATA

- Use customers’ purchase preferences in your CRM
- Use customers’ purchase history in your shop system

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5 TAKEAWAYS IN DESIGNING IN-CONVERSATION EXPERIENCE

Hyper-personalized

Don’t ask your users what they want

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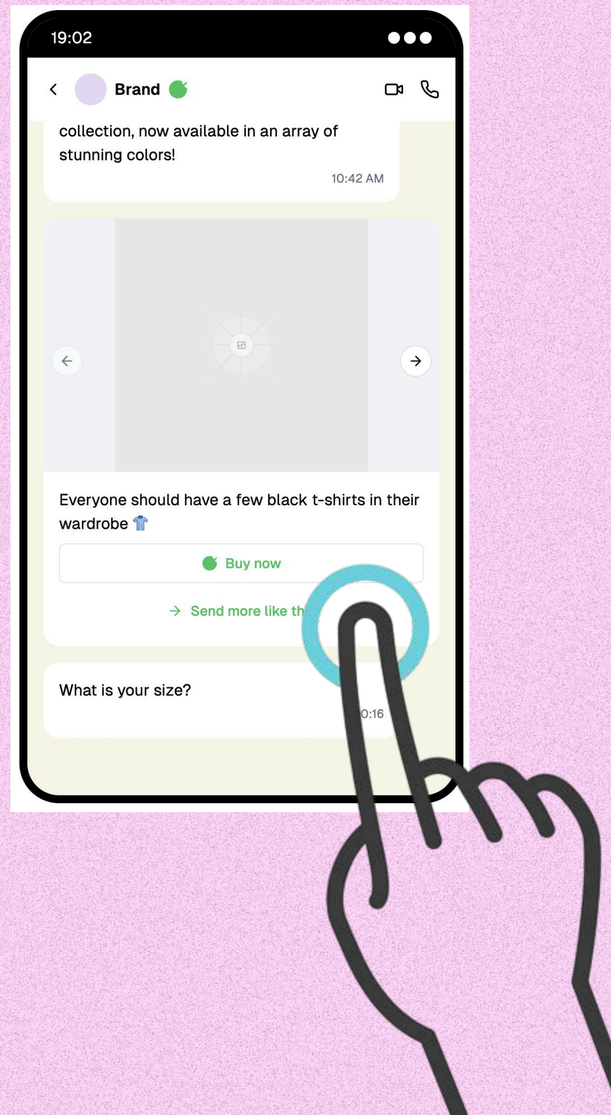
DON'T ASK YOUR USERS WHAT THEY WANT

The agent's job is to figure this out for them, if they know, they don't need the agent

Guide the user by asking good questions

Pay attention to user feedback

Next level is consultative



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5 TAKEAWAYS IN DESIGNING IN-CONVERSATION EXPERIENCE

Hyper-personalized

Don’t ask your users what they want

Meet your customers where they are

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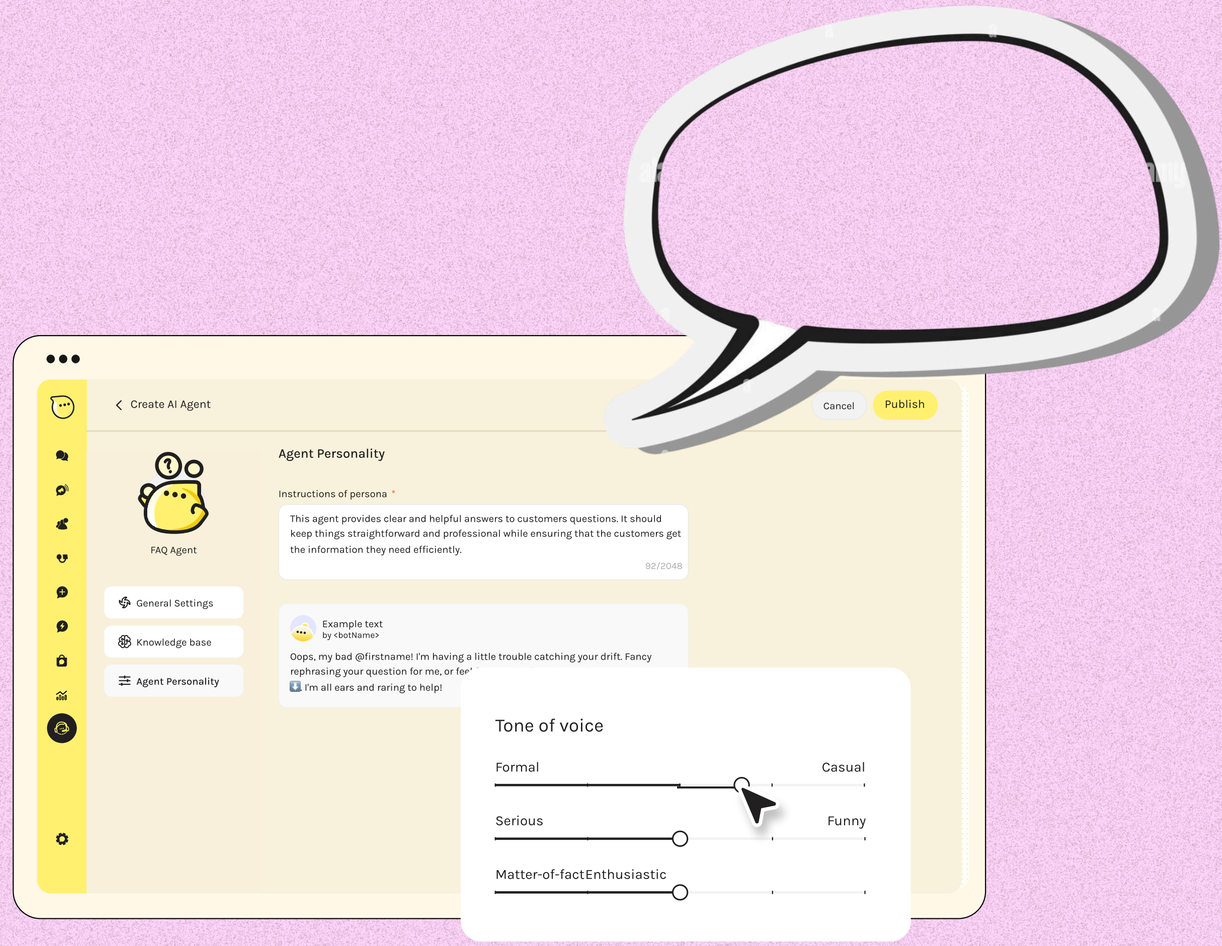
MEET YOUR CUSTOMERS WHERE THEY ARE

Adapting tone and approach to match customer communication style

LLMs matching users' tone of voice

Multi-modal LLM usage



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Don’t ask your users what they want

Meet your customers where they are

Timely engagement

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TIMELY ENGAGEMENT

Reaching customers at optimal moments in their shopping journey

Messaging (like Whatsapp) campaigns

Start with a replenish stock campaign and give users a reason to speak to the AI

Reach your users while they are browsing products

70% shopping carts are abandoned with choice overload being the main reason

Start with a customer service, end in a purchase

Turn your cost center into a profit center through AI conversations

Fuel the traffic by doing click to Whatsapp / chat ads

Once the unit economics work, it’s time to scale

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5 TAKEAWAYS IN DESIGNING IN-CONVERSATION EXPERIENCE

Hyper-personalized

Don’t ask your users what they want

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Timely engagement

Valuable insights from conversations

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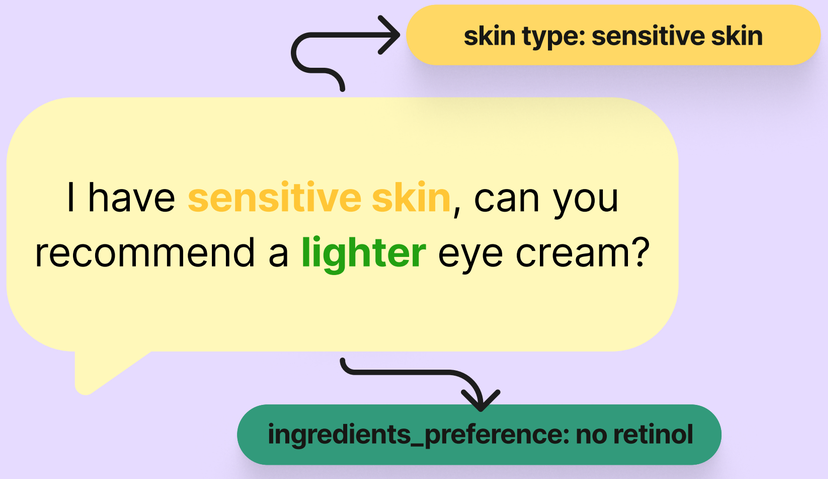
VALUABLE INSIGHTS FROM CONVERSATIONS

The most dynamic way to collect user preferences

COLLECT 0-PARTY DATA THROUGH CONVERSATIONS



FUTURE SEGMENTATION & TARGETING

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5 TAKEAWAYS IN DESIGNING PLATFORM USER EXPERIENCE

Conversation design is not legacy

Double down on retention

Cater to vertical specific needs

Abstract away technical complexity

Test, iterate and monitor

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5 TAKEAWAYS IN DESIGNING PLATFORM USER EXPERIENCE

Conversation design is not legacy

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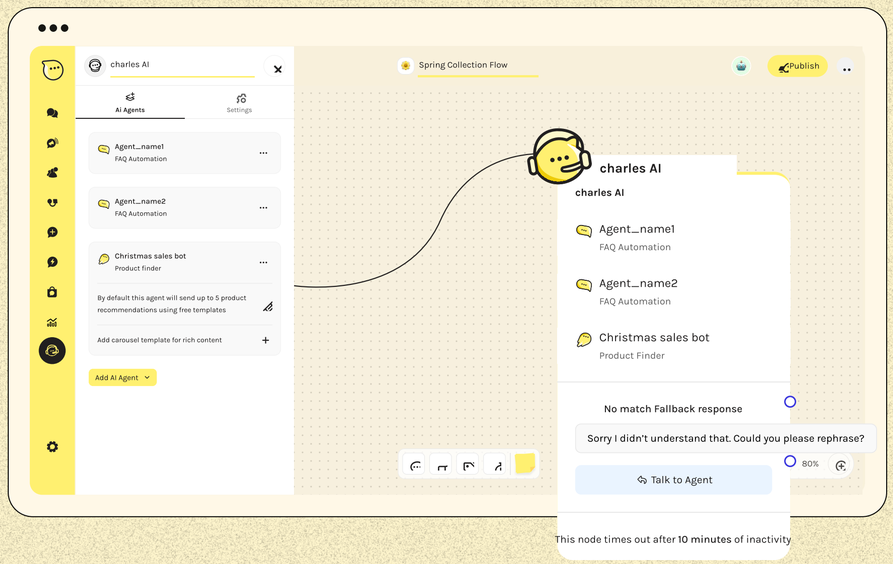
CONVERSATION DESIGN IS NOT LEGACY

Platform users (brands) still want control

Deterministic conversations become a feature

Design the “end” of an AI conversation



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5 TAKEAWAYS IN DESIGNING PLATFORM USER EXPERIENCE

Conversation design is not legacy

Double down on retention

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DOUBLE DOWN ON RETENTION

Attract & convert are important, but double down on retain

1. Ask for a subscription & opt-in

Necessary for customers to receive future marketing communications

2. Purchase reminder

Follow up with a purchase reminder if the order didn’t go through

3. Product recommendation

Follow up with “view similar products” if the order did go through

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5 TAKEAWAYS IN DESIGNING PLATFORM USER EXPERIENCE

Conversation design is not legacy

Double down on retention

Cater to vertical specific needs

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CATER TO VERTICAL SPECIFIC NEEDS

Tailoring AI approaches to different industry needs

VERTICALS

Selling strategy is different across verticals

⚠️ ***SEE...***

...special concerns about beauty

...special concerns about fashion

HORIZONTALS

Horizontal vs. vertical solutions

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ABSTRACT AWAY TECHNICAL COMPLEXITY

Solving the no-code design challenge for platform users

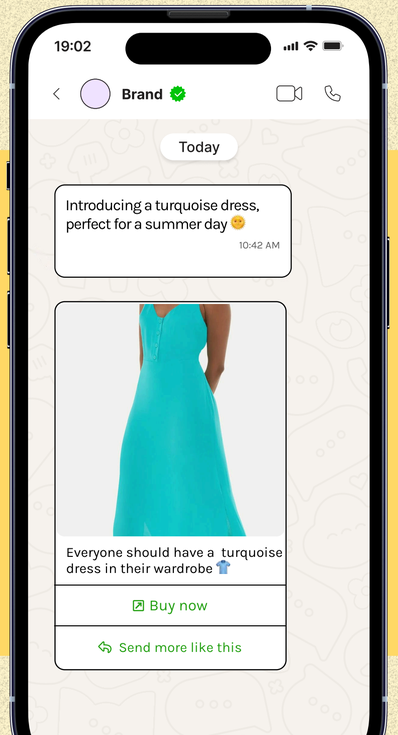
color: turquoise

product_type: dress

I want a **turquoise** **dress** that is good for **a summer day**...

```
{
  color: turquoise,
  product_type: dress
}
```

RAG



LLM

5 TAKEAWAYS IN DESIGNING PLATFORM USER EXPERIENCE

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Test, iterate and monitor

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TEST, ITERATE AND MONITOR

The platform should allow the users to observe and improve AI agents

Escalation rate
Customer sentiment
Fallback rate

4. Agent analytics

Click-through rate
Conversion rate
Attributed revenue

3. Outcome analytics

2. Go live

1. Conversation testing

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