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5 | 2020 **SCHWERPUNKT** Interview mit Guntram Friede (CMO Salesforce) • Sales- und Service-Bots im Vertrieb • Automatisierung in der B-to-B-Marktbearbeitung • Automatisierung in KMUs • Automated Product Suggestions with Needs-based Configurators • Digital-Sales-Enablement • Chatbots as Personalized Sales Agents **INSIGHTS** Oracle: The Art of War & Sales **KOMMENTAR** Die zwei Komponenten der Sales-Automation **SPEKTRUM** Co-Kreation der Marke in Brand-Communities • Kommunikative Ökosysteme

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"From insight to impact"

Adaptive Sales Automation

Chatbots as Personalized and Scalable Sales Agents

Artificial intelligence and natural language processing are fundamentally changing consumer–firm interactions. Sales automation via chatbots is often merely thought of as a cost-saving opportunity. This paper argues that well-designed chatbots allow to establish and nurture customer–firm relationships. The paper proposes a framework that assists in designing and dynamically adapting interface features to brand characteristics and customer needs. The framework is mapped along the traditional sales funnel, suggesting strategies for integrating chatbots throughout the entire customer journey.

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In an age of sales automation (Shih, 2016), what does it mean to automate personal selling? While some tasks such as lead scoring, visitor tracking, or campaign testing are considered quite simple to automate, the one-to-one trust relationship in customer service and sales is still largely regarded as a task only a human can fulfill (Buell, 2018). Yet, advances in artificial intelligence and natural language processing are enabling a new kind of service encounter: chatbots. These humanized interfaces open up the possibility to emulate a one-to-one personalized sales encounter in a digital environment, while providing instant and "always on" customer support. Nevertheless, their success and adoption remain mixed (Hadi, 2019). While industry reports indicate that 80% of businesses are planning to integrate chatbots by next year (BI Intelligence, 2016), the vast majority of customers claim that they still prefer interacting with a human rather than with a chatbot (Press, 2019). Thus, many businesses have so far considered chatbots merely a cost-saving opportunity to automate trivial online tasks rather than an opportunity to augment and upscale their sales force. As such, they are often designed as just another digital marketing tool rather than a personalizable touchpoint to nurture customer–brand relationships.

But what makes human interaction so unique? And how can chatbots be designed to better automate such an interaction? More specifically, what design features should businesses consider to turn these interfaces into valuable sales agents?

Chatbots: The Status Quo

The implementation of chatbot interfaces varies tremendously in current industry practice, testimony to the very different roles these interfaces are fulfilling across businesses. As shown in Figure 1, some brands merely use a brand logo (e.g., Domino's), while others employ brand characters (e.g., Hipmunk's Raghav) or even human avatars (e.g., Amtrak's Julie) to interact with customers; some chatbots use formal filtering functions (e.g., Whole Foods Market), while others use visual product presentations (e.g., H&M) or a more conversational approach (e.g., Lidl's winebot Margot) to identify customer needs and personalize recommendations. More often than not, the implementation is a function of the default settings of the chatbot providers rather than a thoughtful process of how to design individual chatbot features to represent the brand and enable a meaningful customer interaction.

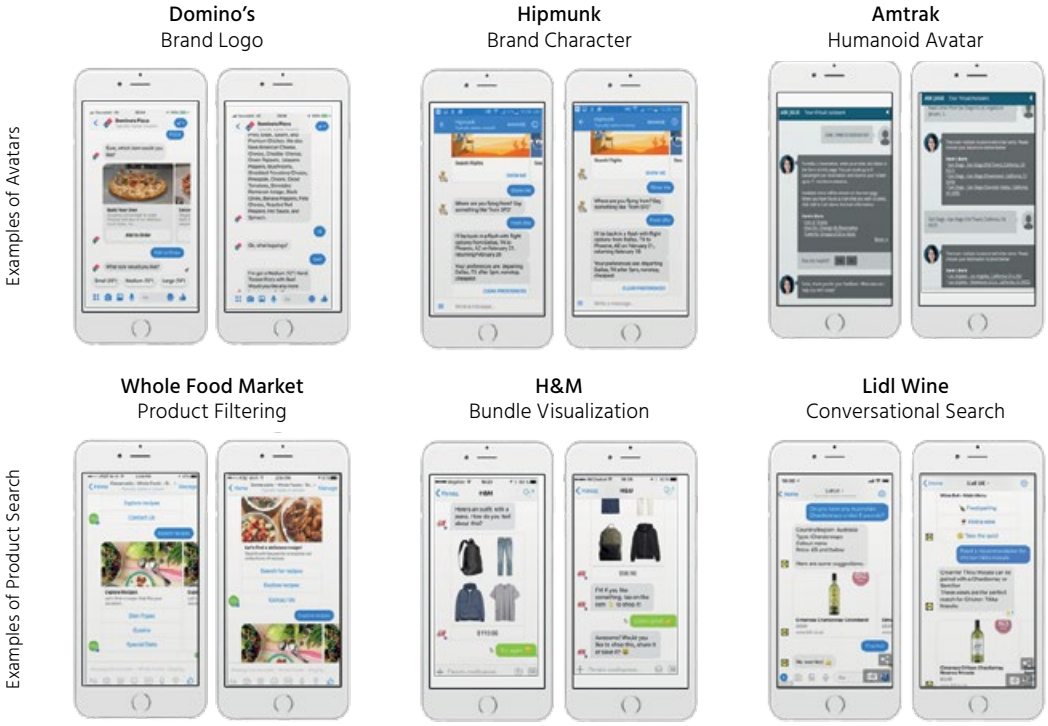
Adaptive Selling with Chatbots: An AI-Powered Sales Automation Framework

Mapping chatbot interactions along the traditional sales funnel, there are four areas of adaptation for a chatbot interface:

- First, an interface should be designed to reflect key brand characteristics and to be congruent with the brand image when targeting new customers, just like any other brand touchpoint (Haynes, Lackman, & Guskey, 1999; Park, Milberg, & Lawson, 1991). Given their unique features, chatbots provide brands with a highly scalable "human voice" that allows a one-to-one interaction with the customer. Thus, interface features should be carefully adapted to reflect brand traits and the brand's "personality" in order to create a consistent and relatable virtual spokesperson.
- Second, during the interaction with a customer, chatbot interfaces should adapt to the user's unique characteristics and behaviors to create a more personalized experience tailored to the customer's needs. Building rapport through dialogue and a more personalized experience helps establish trust and nurture a more emotional connection with the brand (Bergner, Hildebrand, & Häubl, 2019; Hildebrand & Bergner, 2019).
- Furthermore, chatbot interfaces should be adapted to contextual information in order to deliver the right interaction at the right time, based on where in the journey the customer currently is, as well as proposing to connect the customer with a human sales agent when needed.
- Finally, a chatbot interface should not merely be considered an isolated touchpoint automating a single task, but rather be integrated into the full customer journey by proposing meaningful follow-ups designed to allow an ongoing interaction with the customer.

Figure 2 summarizes the critical steps that have to be mapped throughout the customer journey and the sales funnel. The specific chatbot design consideration at each step will be detailed in the following section.

Fig. 1: Examples of Different Chatbot Implementations



Source: Own illustration.

Step 1: Adapting to the Brand

Adding a Human Touch

Humanizing brands by imbuing them with unique traits and personalities is known to help build consumer–brand relationships (Aaker, 1997; Fournier, 1998) and drive sales (Holzwarth, Janiszewski, & Neumann, 2006).

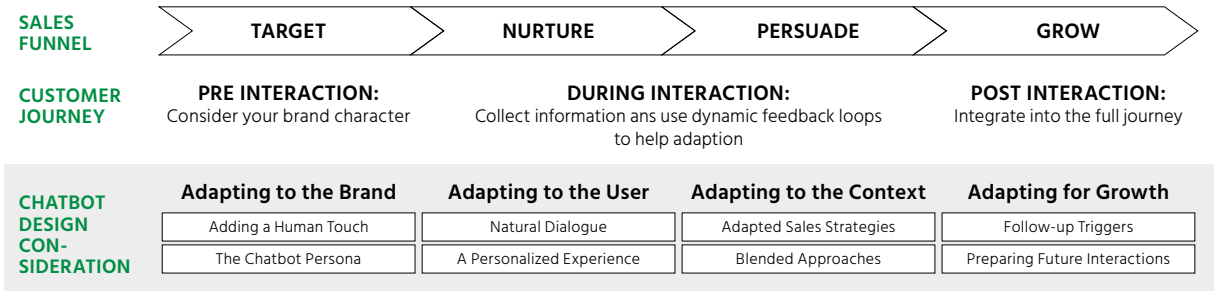
Visual features. In a chat interface, participants are generally represented by a profile image that can significantly influence perceived humanness and credibility of the interacting partner (Nowak & Rauh, 2008). Aspects such as the gender or name impact how users interact with and relate to an interface (Araujo, 2018; Waytz, Heafner, & Epley, 2014). Brand characters or spokespersons, such as Hipmunk's chipmunk (see figure 1), are known to humanize brands (Garretson & Niedrich, 2004). Still, research has shown that people generally prefer interacting with more humanized rather than cartoon avatars (Nowak & Rauh, 2006).

Verbal features. The ability of a chatbot interface to communicate in natural language makes the brand interaction "feel more human" compared to clicking on a static website, as language is considered a human capability (Jurafsky & Martin, 2017). Language in humans is very rich in non-verbal cues and social conventions. In chatbot interfaces these unique aspects of human interaction can be implied by the use of emojis, which attribute human properties to the interface (Park & Sundar, 2015) and convey specific affective states (Dresner & Herring, 2010). Furthermore, social conventions such as introductions, trivial acknow-

Management Summary

This paper proposes a framework for AI-powered sales automation with chatbots. The framework is mapped along the traditional sales funnel, suggesting strategies on how to better adapt these interfaces to the brand and specific customer needs.

Fig. 2: AI-powered Sales Automation Framework



Source: Own illustration.

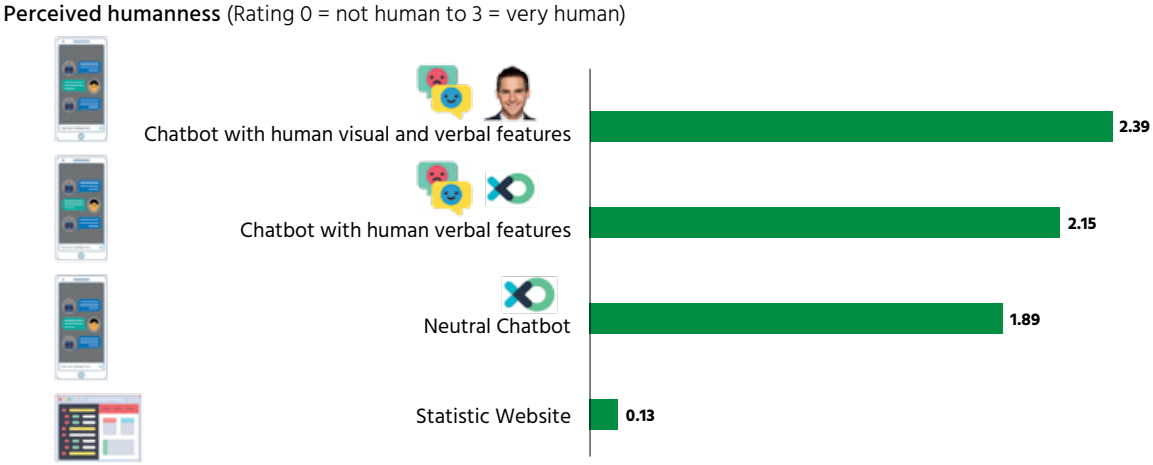
ledgements and the ability to engage in small talk are all aspects unique to human interactions. The ability of an interface to engage in such behaviors therefore influences how human the interface is perceived to be (Bickmore & Cassell, 2000). Figure 3 shows results from our own research, demonstrating that such visual and verbal features can significantly increase a chatbot's perceived humanness (Bergner, Hildebrand, & Häuble, 2019).

The Chatbot Persona

Aside from merely appearing human, chatbots should be considered brand advocates whose personality should be adapted to reflect key brand traits.

Warmth vs. competence. Just like humans, brand personalities are assessed along the two dominant dimensions of warmth and competence (Fiske, Cuddy, & Glick, 2007). Warmth is related to friendliness, compassion, trustworthiness, and helpfulness, while competence is related to intelligence, skillfulness, expertise, and efficiency. An entity can be judged as both warm and competent, but warmth judgements generally happen faster and are predominantly based on affect (Fiske et al., 2007). How warm vs. competent a chatbot interface is designed to appear should be congruent with the brand personality. Visual cues such as facial expressions (Landwehr, Mcgill, & Herrmann, 2011) and gender (Grohmann, 2009), as well as more subtle cues in language and gesture can affect perceptions. For example, expressing empathy may increase a

Fig. 3: Perceived Chatbot Humanness



Source: Own illustration.

chatbot's perceived warmth, while demonstrating domain expertise may increase a chatbot's perceived competence.

Extroversion. A second aspect important to impression formation in interpersonal interactions is the extent of extroversion shown by the interacting parties. Extroversion has also been defined as the extent of "sociability" (Lucas, Diener, Grob, Suh, & Shao, 2000) and is known to have prominent and distinct linguistic features (Hildebrand, Efthymiou, & Busquet, 2020; Oberlander & Gill, 2006). Specifically, a higher number of words, a certain level of abstraction and subjective language, or a preference for adjectives seem to be associated with more extrovert personalities (Beukeboom, Tanis, & Vermeulen, 2013; Oberlander & Gill, 2006). Thus, in a conversational interface, these syntactical features can provide important indications about the personality of the chatbot and the brand and should be carefully considered when designing chatbot responses.

Step 2: Adapting to the User

Natural Dialogue

Before recent advances in artificial intelligence and natural language processing, dialogue has been an exclusive characteristic of human interaction. It is known to play an essential part in establishing trust and defining the social roles of interacting parties (Wiemann & Knapp, 1975).

Building rapport. Research in linguistics and communication has revealed that turn-taking in interactions is a fundamental human characteristic, acquired even earlier than language itself (Levinson, 2016). The act of taking turns during conversations has been shown to lead to more intimacy, liking and trust between interacting partners (Sprecher, Treger, Wondra, Hilaire, & Wallpe, 2013). A chatbot's ability to autonomously engage in such natural dialogic interaction is therefore key to improving engagement with the customer and establishing intimacy and trust. Its ability to react to various utterances and intents from the customer and engage in more trivial "social dialogue", such as answering unrelated questions, increases the number of turns and humanizes an interaction, thus influencing a customer's affect toward, and trust in, the chatbot and the brand (Bickmore & Cassell, 2001).

Establishing social roles. The rules and norms that govern a reciprocal turn-taking interaction (e.g., the amount of "air time" given to each party, or the knowledge of when to speak) are known to be key indicators with regard to the social roles of the interacting parties (Wiemann & Knapp, 1975). Recent research on relationships with AI-enabled objects suggests that the social roles expressed by a smart object during an interaction may lead to fundamentally different customer experiences (Novak & Hoffman, 2018). Thus, structural and verbal aspects of the dialogue should be adapted to reflect the chatbot's role during the interaction as an advisor, friend, or assistant. Using profiling questions, sentiment detection and feedback loops during the interaction can help to further adapt the chatbot's expressed social role to specific customer needs and expectations.

Main Propositions

1. Chatbots provide an opportunity to augment a business's sales force through automation.
2. Today, chatbots are primarily used to automate simple tasks rather than to establish and nurture personalized customer relationships.
3. To leverage their full potential, chatbots should be designed to reflect the brand character and dynamically adapt to specific customer needs along the customer journey.

A Personalized Experience

Aside from the structural aspect of turn-taking, a second important aspect of interpersonal interaction is the extent of similarity and reciprocity between the interacting partners. By collecting information on the user before and during the interaction, the interface is able to adapt to user characteristics and mimic emotional expressions, creating a more intimate and personalized experience, similar to interacting with another human being.

Similarity. Similarity not only increases liking and creates a more intimate relationship, but can also have important downstream consequences on the effectiveness of persuasion attempts (Cialdini & Sagarin, 1994). Adapting the visual features of the chatbot interface, such as the gender or name of the avatar, can create a more positive interaction for customers. Research on online avatars has shown that people tend to prefer interacting with avatars that match their own gender (Nowak & Rauh, 2006). In our own research we found that personalizing chatbots to match customer characteristics significantly increased their persuasiveness when proposing trade-up options to customers (see figure 4) (Bergner, Hildebrand, & Häuble, 2019).

Emotional reciprocity. During interactions, humans tend to reciprocate emotions by mirroring non-verbal emotional expressions such as facial expressions, vocal features or bo-

dy postures, which leads to more intimacy through a shared emotional experience called "emotional contagion" (Hatfield, Cacioppo, & Rapson, 1993). While emotional reciprocity in text-based chatbot interfaces is limited, adapting subtle linguistic features and non-verbal cues to match customer behavior will create a more positive and intimate interaction. This requires that chatbots are not only able to mimic but also to interpret customers' potentially ambiguous emotion expressions during conversations (e.g., use of emojis in place of words, use of abbreviations such as "lol", etc.), in order to appropriately respond to them.

Step 3: Adapting to the Context

Research on effective sales strategies has shown that adapting to customer needs and the selling situation is key to driving sales (Franke & Park, 2006; Spiro & Weitz, 1990). Specifically, empirical findings show that such an individual customer orientation increases trust in the salesperson, nurtures brand relationships and increases overall customer satisfaction (Stock & Hoyer, 2005).

Adapted Sales Strategies

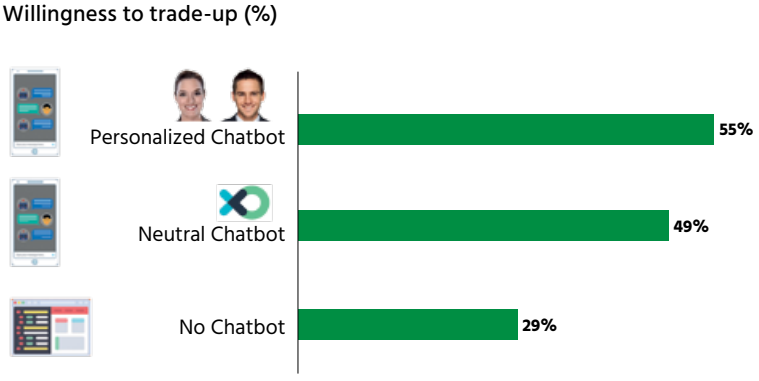
Buying task. It is widely accepted that the buying task (e.g., new purchase vs. repurchase) has an important impact on the amount and type of information a customer requires. Specifically, for a new buy customers may want to learn more about the brand, compare various products or ask a chatbot for guidance to determine the right product for their unique needs, while during a rebuy the chatbot may simply execute a previous order. By collecting and storing information on the purchase history of the customer, a chatbot can adapt the type and amount of information provided, as well as propose adapted up- or cross-selling opportunities to the customer.

Buying stage. The customer's stage in the purchasing journey requires additional adaption of the interaction to help move the customer to the next stage in the purchase journey. Specifically, research on effective communication processes in sales has shown that successful salespeople adapt the time spent on task comments (e.g., providing information, comparisons, recommendations) and socio-emotional comments (e.g., support, agreement, acknowledgement) to the stage in the customer journey as well as individual customer traits (Schuster & Danes, 1986). By collecting information throughout the customer journey and creating ongoing feedback loops on the effectiveness of different communication strategies, the interface can dynamically adapt to such individual task needs.

When to Use a Blended Approach

While this paper underlines the potential of chatbots as sales agents, there are certain situations that will require human intervention. Research has shown that anthropomorphism can backfire in the context of product wrongdoings or bad publicity (Puzakova, Kwak, & Rocereto, 2013), as well as for dissatisfied customers (Hadi, 2019). In their research, Hadi and colleagues show that a humanized customer service chatbot generally increased customer satisfaction, except for angry customers, for whom it drastically decreased satisfaction compared to interacting with a non-humanized chatbot (Hadi, 2019). One solution to this problem is a blended ap-

Fig. 4: Customers' Willingness to Trade Up Depending on Chatbot Personalization



Source: Own illustration.

Lessons Learned

1. Design a chatbot with the same considerations in mind as you would when recruiting a sales agent to represent your firm.
2. Use visual and verbal features of the interface to humanize the interaction and design a persona that accurately represents your brand.
3. Collect data during an interaction to enable the chatbot to dynamically adapt to specific customer needs and buying tasks, as well as prepare for future interactions.
4. Bring the chatbot outside its standard chat interface and allow it to interact with customers across various channels, integrating it into the full sales journey.

proach that redirects customers to a human sales agent when needed. By collecting information on the issue that needs to be resolved, as well as analyzing customer sentiment via natural language processing during the interaction (see, for example, Hildebrand et al., 2020), the chatbot can detect dissatisfied customers and swiftly connect them to a human counterpart better suited to solve the specific problem the customer is facing.

Step 4: Adapting for Growth

Finally, in order to augment the chatbot's impact as a sales agent for the brand, its interaction with the customer should not be considered a one-off isolated touchpoint, but rather be integrated with other communication channels of the brand.

Follow-up Triggers

One way to keep the interaction going is by using automated follow-up triggers sent directly by the chatbot sales agent. For example, an automated follow-up email, personalized with customer information collected throughout the interaction, can help assess a customer's readiness to purchase or propose additional trade-up or trade-across opportunities. Another example would be a printed note accompanying a recent order, thanking the customer for the purchase in the name of the chatbot sales agent. Both procedures bring the chatbot outside of its standard medium of interaction and allow it to interact with the customer across the entire sales journey, just like a human sales agent would.

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Preparing for Future Interactions

Data collection during the interaction with chatbots (e.g. via cookies, direct profiling questions, or using natural language processing; see Hildebrand and Schlager, 2019 for examples) is not only key to designing chatbots as truly adaptive user interfaces, but by storing this information, the interface can prepare future interactions with the customer more effectively. It can pick up a conversation where it was left off and provide the customer with the experience of a tailored one-to-one sales process.

Discussion and Conclusion

This paper does not argue in favor of replacing human sales agents with chatbots. Rather, it proposes an augmentation of the sales force by bringing personal selling into the digital space through smart integration of chatbots into the customer journey. Chatbots need to be considered not merely a tool to automate isolated tasks, but rather an important brand advocate and a uniquely personalizable advisor. With recent developments in artificial intelligence, interacting with such humanized interfaces will potentially become indistinguishable from interacting with a human sales agent in the future. To leverage their full potential, brand managers need to carefully consider how to design these interfaces to reflect the unique personality of their brand while adapting to key customer needs throughout the sales journey. Only then can chatbots become highly valuable, scalable, and personalized sales agents for a firm, nurturing brand relationships and driving sales.

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