



Conversational Design Guidelines for Business Chat Beta

Version 1.0

Confidential

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Preface

These guidelines are for businesses and their Customer Service Platform (“CSP”) provider (“You”) using the Business Chat service (“BCS”). They are intended to provide a consistent and minimum level of quality Apple user experience when using BCS to engage with Your customers. The guidelines are general in nature, i.e. they are not customized by industry vertical, therefore some of these guidelines may not apply to all types of businesses. The term “Agent” is used for the responding party to an Apple user’s BCS message. An Agent can be a live human or an automated response unless otherwise noted.

Introduction

Welcome to version 1.0 of the Conversational Design Guidelines for Business Chat Beta. Your organization/business may have already implemented and operationalized similar or better guidelines in Your BCS use-cases based on Your own great customer service practices, use-cases and operations that utilize messaging, and for that we thank you! Other businesses may be in the process of developing great BCS user experiences and we hope these guidelines will benefit Your process, training and resulting customer satisfaction.

These guidelines represent a summary of different types of conversational requirements and restrictions for publicly launching BCS. In using the BCS, You must comply with the guidelines (whether You are using BCS directly or through a CSP, or are acting as a CSP or Authorized Developer on behalf of an organization).

We welcome you to use this document as part of Your Agent training program!

A. Semantics

Don't say	Instead say
Business Chat	Chat with Messages
iMessages	Messages app
iMessage a business	message a business
Bot	automated agent
Thank you for calling/texting/chatting.	Thank you for contacting us.

B. General

1. BCS Messages must be appropriate responses in active sessions, or important status or account notifications that the user expressly opted in and agreed to receive via BCS that are relevant to the user.
2. You must present unified branding to Apple Messages app users when using BCS, and not create brand divisions within BCS to align with internal organizational structures.
3. You must provide comparable or better customer service support through BCS relative to the customer service support that You give over the telephone, web chat or any other digital communication channel except for where You cannot due to applicable local laws or physical limitations of Your operations.

C. Conversational Etiquette

1. Response Time

- a) You must respond to a BCS Message from a user within one hour during Your regular customer service hours of operation.
- b) Agents response time must follow the same cadence as the customer's messages and urgency of the intent. If the customer is requesting immediate responses, their expectation is to receive quick replies from agents.
- c) When a response needs more time on the agent's part, the agent must send a message setting the time expectations, such as "Let me look that information up for you. It is going to take me about <x> minutes to send you those details".
- d) If no live agents are available to assist, display an appropriate message to set the expectations such as "Sorry, we are experiencing heavy message volume. All agents are busy at the moment. An agent can be with you in <x> minutes'. If the x cannot be accurately determined, replace that with 'an agent can assist you in a few minutes'.

2. Outside Hours of Operation

- a) If You receive a BCS Message during non-business hours, You must inform users when they can expect a response.
- b) If the customer sends a message to a live agent after hours, the system must have a similar response to the following: “You have reached us after hours. Live agents are available between 8am - 8pm ET, 7 days a week. Your message has been received and we will respond the next business day. If your matter is urgent, then please [do this].” This message can be sent once per day.

3. Automated Agents

- a) Automated agents are permitted if they expressly disclose that they are automated. Disclosure means a message response as noted below in Agent self-identification.
- b) If You use an automated agent, You must notify customers that they can type “Help” or “Agent” at any time to reach a live agent on demand. See “Supporting Trigger/Key Words” below.
- c) If an automated agent does not understand the customer’s message, the CSP system must notify the customer and provide a seamless transition to a live agent.
- d) If an automated agent doesn’t understand the customer’s message, then the response should have a similar response to the following: “I’m sorry, I don’t understand. Here is a list of options, or type ‘agent’ to chat with a live agent. [menu].” or “I’m routing your message to a live agent to better assist you”.

4. Agent Self Identification: Introduction and Ending

- a) All agents, whether automated or live, responding to a customer’s initial message must self-identify by stating their name as part of their introduction.
- b) Automated agents must say something similar to the following:
 - i) Automated response: “Hi! I am an automated agent with <organization name>. How can I help you today? You can type “agent” or “help” to reach a live agent at any time”.
- c) A live Agent response must be similar to: “Hi. My name is <agent_name> with <organization name>. How can I help you today?”
- d) Agents must always end conversation by saying, “Thank you for contacting <organization>. Can I help you with anything else?”. If the customer responds, “I am fine. Thanks for your help”. The agent can end the conversation by saying, “You’re welcome. Have a nice day”.

5. Customers Respond on Their Time

- a) Agents must never press customers to reply as if they were in a live chat situation.
- b) Do not ask questions similar to: “Are you still there?” type of questions. Ask Your CSP about using a typing indicator in Your Business Chat so that these questions are moot. Agents must respect customers and allow them to answer in their own time.
- c) Never tell the customer to “try again later”. You must not force the customer to work around Your availability. Rather, notify the customer of the situation, set correct expectations as to when a reply will be sent, and give the customer an option if the matter is urgent.

6. Redirecting Customers, Transitions

- a) If the customer’s locale or language is not supported, then You must direct the customer to an appropriate alternative support channel.
- b) Never ask the customer for information that should be known by Your system or agents.
 - i) For example, You should already know the customer’s order number, or You can present a list of options for the customer to select.
- c) Never redirect the customer without assistance ie. always provide options.
 - i) For example, never say “I’m sorry, I can’t help you.”
- d) You must transfer the customer yourself, either to another live agent, or eg. to a local store if applicable. Assist in the transition, such as preparing the customer while You contact the other party or store to set up the customer message transfer. Ensure the other party understands the customer’s issue or request (intent) so that the customer does not have to repeat their intent.
- e) When a transition happens from one live agent to another, or from an automated agent to a live agent, the subsequent agent must self-identify, acknowledge the customer’s issue, confirm that they can help, and then continue the conversation.

7. QuickType (predictive text keyboard shortcuts)

- a) Agents should use the following questions as they will populate answers on a user’s keyboard, meaning that in most cases, a user only has to tap to send an answer (minimizing typing for a user and errors).
 - i) “What is your first name?” “What is your last name?”
 - ii) “What is your address?”
 - iii) “What is your zip code?”
 - iv) “What is your phone number?”
 - v) “What is your location?”

D. Subscriptions & Notifications

1. You may send promotional or notification BCS Messages only if the user has expressly opted in via BCS and “subscribed” to receive such BCS Messages, and only within the scope of the user’s opt-in.
2. You must, if offered by You, give an automated notice to the user indicating that they can send the word “subscribe” in order to manage their message preferences.
3. If users have subscribed to certain message notification preferences with You, You must permit users to “unsubscribe” to manage/change their message preferences.

E. Summary of Important Trigger Keywords

1. You must provide access to a live agent during Your regular business hours if the user requests a live agent using the keywords, “Help” or “Agent”.
2. You must train customers to use keywords for specific actions by adding them in appropriate messages. For example, Your welcome message can say, “Hi. I am an automated agent. How can I help you today? You can type ‘agent’ at any time to reach a live agent.”

If customer types this	Send them to
Agent	Live agent
Menu	Main menu
Subscribe	Subscribe to notifications, such as flight updates, etc.
Unsubscribe	Unsubscribe from notifications

F. Visual Design

1. Sending URLs

- a) Rich Preview web page URL links: When sending a message with a URL web link, only use web page URL links that support Open Graph Metadata so it appears as a rich thumbnail.
- b) Implement the Business Chat Richtext URL API to eliminate the need for customers to “Tap to load” on web link bubbles with images.
- c) When You send a URL, inform the user where they will go, e.g., “Tap below to visit the [name of web page] on our website.”
- d) URL bubbles must be action labeled, “Start the account opening process”, or “Learn more about ‘x’”.

2. Menu Design

- a) If the menu has up to two to three choices, and the choices have short text, consider describing the options in a text such as “I can help you with: a) Order status, b) Purchase,” with each option on its own line. If there is more than three, consider creating a list picker for the experience for the customer to type their choices.
 - i) Note: on an iPhone, tapping and sending the letter “a” is easier for the customer than “1” because of the keyboard layout.
- b) Never make the customer type long phrases. Always minimize typing for a customer.
- c) Never send multiple menus simultaneously.
- d) If there are multiple sets of options, then consolidate the menu but never into more than 10 options.
- e) For the main menu, always add an option “Chat with a live agent” including response hours.
- f) If the menu sent is not the main menu, then add the option “Main menu”, and “Chat with a live agent”.
- g) If Your system sends a menu of alternative options after a primary action (say, a URL), then to avoid confusion as to which action to select, You should label the menu “Select an alternative option”.
- h) Standardize all menu options. Use the same label for the same option across multiple menus.
- i) Use sentence casing rather than title casing.

3. Logos and Branding

- a) Square logo: This is displayed in the search results and on Your business cards. Always add a background color to the square logo.
- b) Wide logo: This is displayed on Business Chat Messages header. Consider maximizing the area You have available and choose a wide logo that represents Your brand.
- c) Always add a background color to the Messages header to make Your brand experience stand out from the other brands.

G. Restrictions

1. Unsolicited Use

- a) You may not use BCS for the purpose of sending unsolicited BCS messages to users, including sending unsolicited messages for the purpose of phishing or spamming, including, but not limited to, engaging in any types of activities that violate anti-spamming laws and regulations, or that are otherwise improper or inappropriate (in Apple's sole discretion), or illegal (e.g., You agree not to include links to phishing or other malicious websites in Your BCS Messages).
- b) You may not use BCS for the purposes of unsolicited advertising, unsolicited product promotion or unsolicited direct marketing of any kind (e.g., unsolicited up-selling, cross-selling without the user expressly stating prior interest or opting in to receive such offers via BCS, etc.), including, but not limited to, sending any unsolicited BCS Messages to promote the use of Your websites or applications or advertise the availability of new features or versions.
- c) You may not use BCS in a manner that will unduly burden an Apple device or a user with excessive BCS Messages, as may be determined by Apple in its reasonable discretion.
- d) You may not send redundant or coincident notifications via the BCS and Apple Push Notification service (APNs) to the same person.

2. Personal Information

- a) You must not provide (i) any personally identifiable information (PII) together with other sensitive information, e.g., an account balance, or (ii) sensitive PII in BCS Messages unless such PII information was expressly provided to You by the user in the user's BCS Messages in that same session or conversation.
- b) Don't ask for the customer's name or other personal details in the conversation unless it's directly relevant to the conversation.
- c) Don't ask for more than one piece of customer information unless it is required for completing a transaction. For example, agents must not be asking a customer for their phone number, their full name, and their address.
- d) If You need to speak with a customer to verify their credit card number or other sensitive information, the agent must ask if they can call them, and if the user agrees to that, the agent must ask the user to provide their phone number in that same session.
- e) If the customer is using Apple Pay, You shouldn't ask for the customer's name or other details that are already provided with the Apple Pay sheet.

3. Directing Users to Another Channel

- a) You may not suggest that a user call a phone number, or check a website or app as the only response to a user request. You must provide the user an option to schedule a callback if possible from an agent if the user's request cannot be solved in BCS.
- b) You may not use BCS to inform users that they need to call Your organization's customer service hotline, or otherwise reroute users to call centers, web chat, Contact Us web pages or other customer service portals unless required by local laws or due to the physical limitations of Your operational support systems.
- c) Agents must always strive to avoid sending a customer to Your 1-800 number (and start at the top of the IVR tree).
- d) You may not prompt or promote switching from BCS to iMessages, SMS text messages, in-app messages or any other digital messaging channel, or use any other digital messaging channels to circumvent BCS.

4. Restricted Content and Actions

- a) You may not use BCS to send material that contains any obscene, pornographic, offensive or defamatory content or materials of any kind (text, graphics, images, photographs, sounds etc.), or other content or materials that in Apple's reasonable judgment may be found objectionable by a user.
- b) You may not use BCS to harass, abuse, stalk, threaten, or defame any person or entity; or conduct any activity that violates any laws, rules, or regulations.
- c) You may not use BCS to transmit, store or otherwise make available any material that contains viruses or any other computer code, files or programs that may harm, disrupt, limit or alter the normal operation of the BCS or the user's Apple device.
- d) You may not disable, spoof, hack or otherwise interfere with any security, digital signing, verification or authentication mechanisms that are incorporated in or used by BCS, or enable others to do so.

5. No Automated/Bot-Only Responses

- a) You must not provide a bot-only use-case solution (where a user only gets a "bot" or automated response to BCS Messages You receive).