

Optimizing Intuit QuickBooks' Chatbot with Conversational Data Cloud™



At Intuit, customer service is critical to the overall success of their business. [Intuit QuickBooks](#), which serves seven million small businesses, knew there had to be a smarter way to service their customers and provide the accounting support they needed.

In 2017, they introduced the QuickBooks Assistant, a conversational chat experience that self-employed business owners can turn to for any number of support questions.

The Challenge

High Loads of Unstructured Data

To facilitate speed and reduce escalation, chatbot interactions with QuickBooks Assistant needed to be perfectly clear with zero confusion.

However, to achieve this presented a big challenge: with QuickBooks Assistant having so much unstructured data, their team was spending days trying to manually identify mishandled or unhandled intents. In turn, customers were getting annoyed with inaccurate responses and escalation to a live agent.

For Intuit QuickBooks customers, when their chatbot failed to deliver, it would either be presented with a mishandled intent or a default “fallback” response. Both were frustrating to see when customers were trying to get support. The Intuit team didn't know how to pinpoint where users were experiencing frustration in order to figure out which parts of the conversation needed optimizing or building out. They needed visibility into every conversation.

The Solution

Fixing Bottlenecks With Dashbot

To improve the performance of and optimize QuickBooks Assistant, Intuit turned to Dashbot's Conversational Data Cloud™. This allowed Intuit to benchmark the current state of their chatbot, and then identify and prioritize the highest impact tactics to improve.

Dashbot provided a full transcript of every session to map out conversational paths a user had with QuickBooks Assistant - how and what customers were asking. They were able to optimize the conversation flow based on the actual conversations customers were having.

“If I see a lot of people asking for an Intent, then I know it definitely has a more compelling business case,” Ganz said. “It shows me things I should build towards.”

The Results

Lower Escalations, Higher Conversions

QuickBooks Assistant sees millions of messages from users. Dashbot provided Intuit visibility into all these conversational paths. As a result, Intuit was able to reduce fallback intent, or events where the bot had to respond with ‘I don't know’, by over 35% and human escalations by 57%. More importantly, as usage for the QuickBooks Assistant increased, human escalation still continued to decrease.

Because of the proven success with QuickBooks' Self-Employed product, Intuit expanded the QuickBooks Assistant to QuickBooks Online, a much more complex and full-scale chatbot experience.

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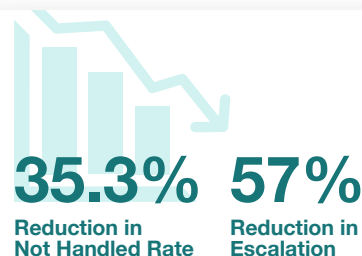


“Our ultimate goal was speed-to-benefit. When someone wants to know how to do something or needs information, it should be faster than even the fastest human help.”

Scott Ganz
Principal Content Designer

For example, QuickBooks has a bank widget that connects with financial institutions to pull data. People can reach this intent by asking to connect their bank, however, when asking to add a credit card, it will trigger the same bank widget - which is not what the customer is looking for - a mishandled intent that leads to escalation to a live agent.

Through Conversational Data Cloud™, the Intuit team realized that when people asked the QuickBooks Assistant how to add a credit card to pay for QuickBooks, they were getting the “add a bank” intent. The team was able to change the wording and separate those two intents, solving that point of frustration for their customers.



1M+ sessions/month | 50+ bots