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Designer

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Clari Chatbot

This project was to enhance TD chatbot experience.
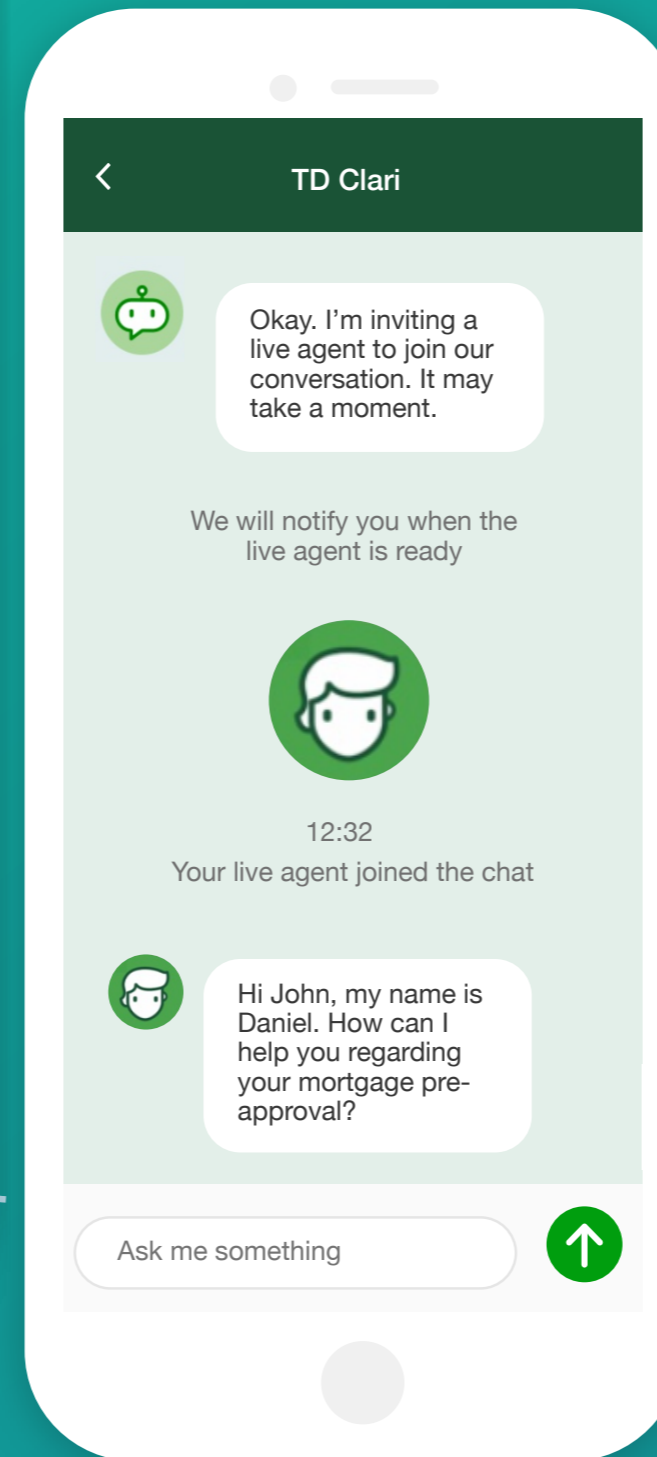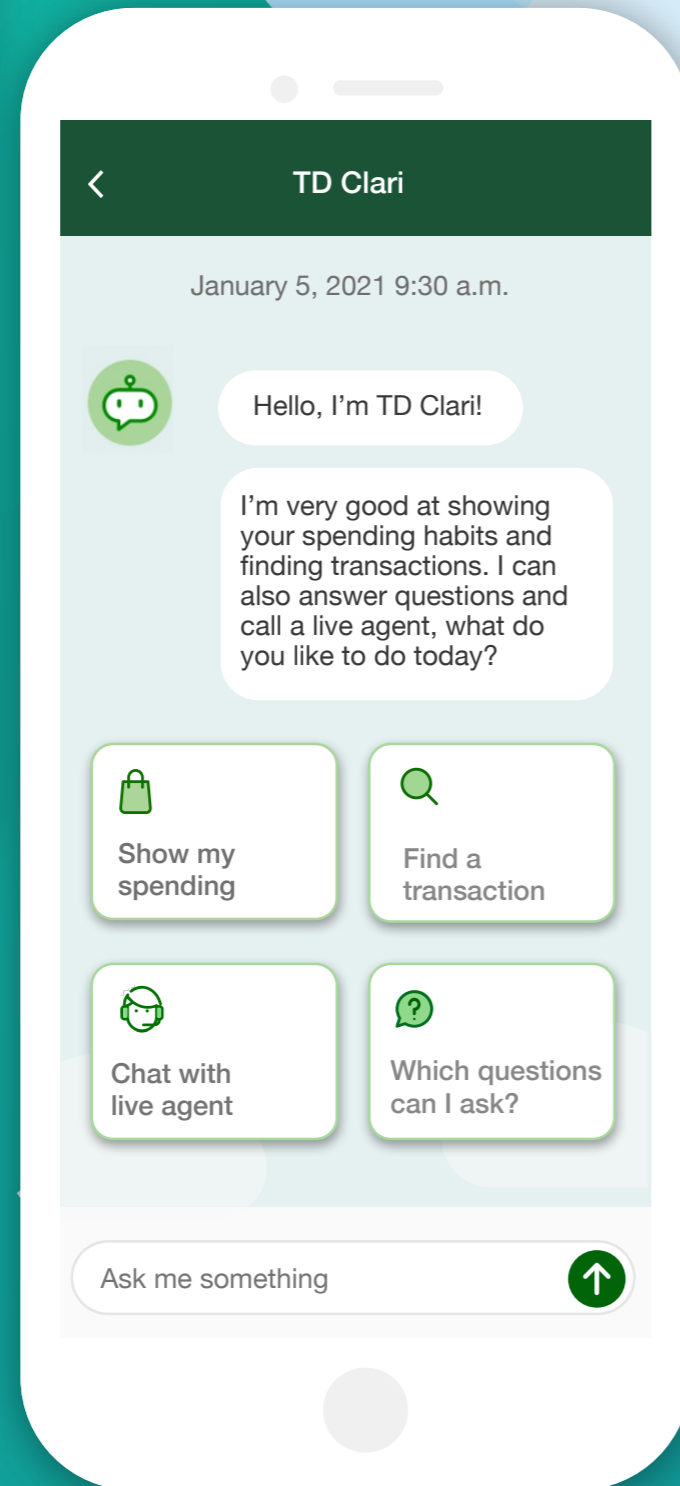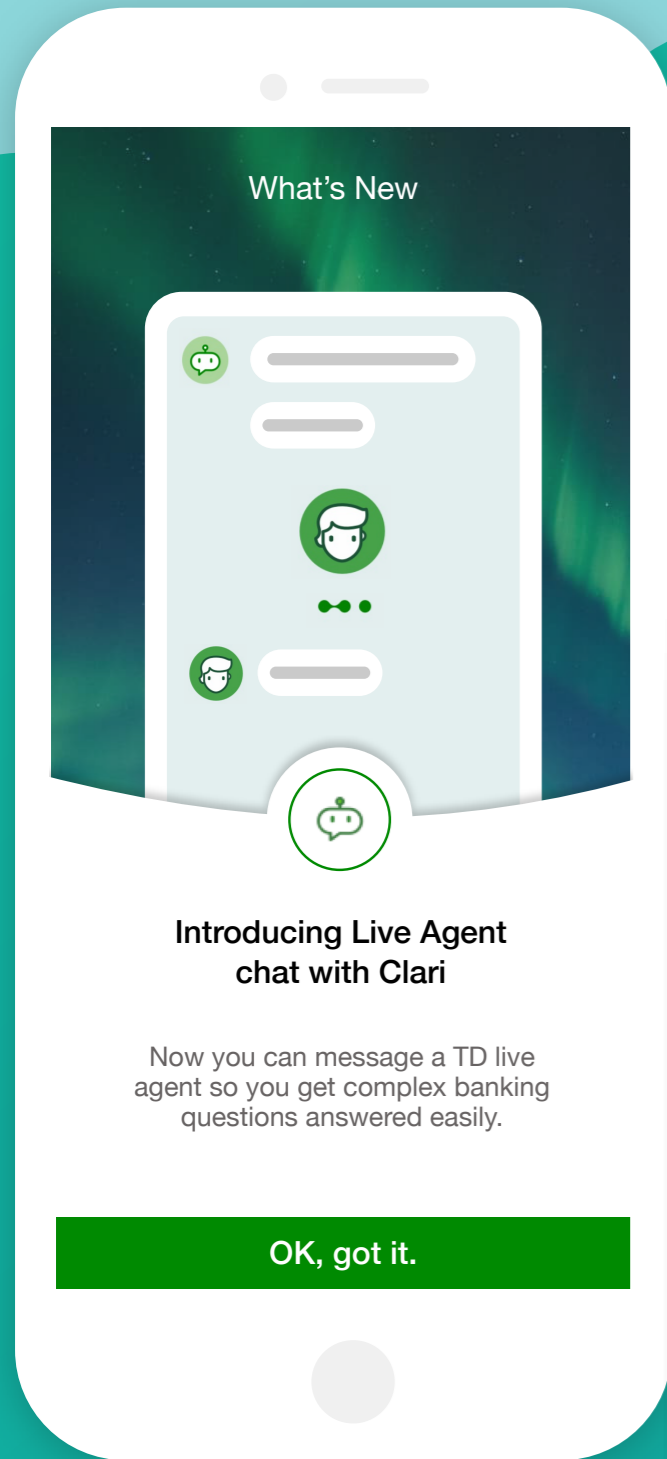
My role
User experience designer

The team
Myself, a visual designer, a copywriter, the engineering team, design managers and product owners.

Company: TD Bank

What's New

Introducing Live Agent chat with Clari

Now you can message a TD live agent so you get complex banking questions answered easily.

OK, got it.

TD Clari

January 5, 2021 9:30 a.m.

Hello, I'm TD Clari!

I'm very good at showing your spending habits and finding transactions. I can also answer questions and call a live agent, what do you like to do today?

Show my spending

Find a transaction

Chat with live agent

Which questions can I ask?

Ask me something

TD Clari

Okay. I'm inviting a live agent to join our conversation. It may take a moment.

We will notify you when the live agent is ready

12:32
Your live agent joined the chat

Hi John, my name is Daniel. How can I help you regarding your mortgage pre-approval?

Ask me something

Work in progress

Clari

The problem

Why business wanted to solve it?

Low engagement & low retention was a problem.

Some questions that generate high call volume could be addressed by the chatbot.

Reducing call center costs would bring business benefits.

Clari

Opportunity

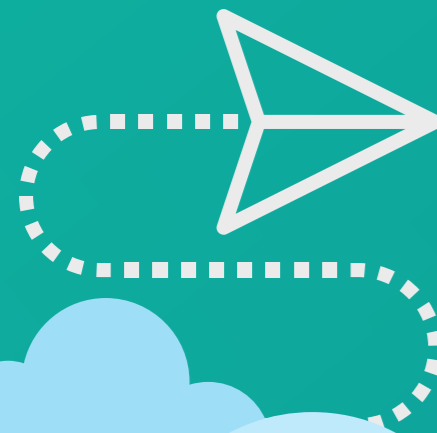How might we help our customers learn they can have common questions answered in TD app?

The approach

Awareness tactics

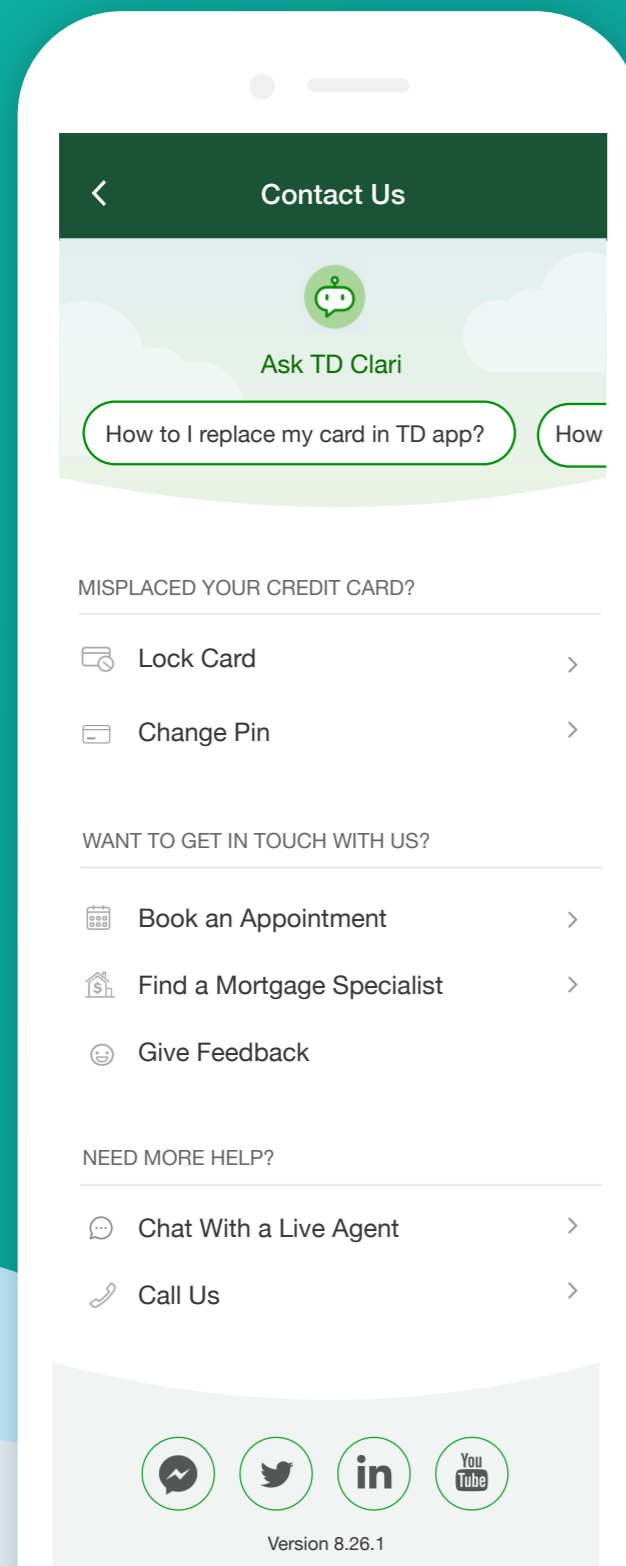Improve the conversational model

Redesign the onboarding

Live agent chat

Clari

Contact Us
Preventing phone calls

Contact Us

Ask TD Clari

How to I replace my card in TD app?   How

MISPLACED YOUR CREDIT CARD?

Lock Card

Change Pin

WANT TO GET IN TOUCH WITH US?

Book an Appointment

Find a Mortgage Specialist

Give Feedback

NEED MORE HELP?

Chat With a Live Agent

Call Us

Version 8.26.1

Contextual insights

When searching transactions on account activity

We noticed you spent **$67.00** at Starbucks in the last 30 days.

Ask TD Clari about your spending
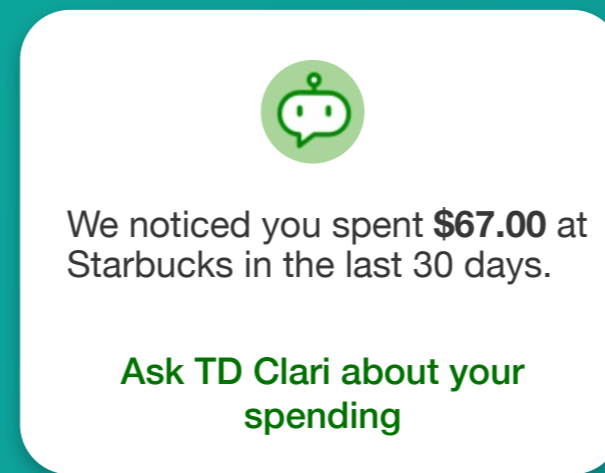
What's new

Improve visual design to promote engaging

What's New

Introducing Live Agent chat with Clari

Now you can message a TD live agent so you get complex banking questions answered easily.

OK, got it.

Clari

New onboarding

Before

After

TD Clari

January 5, 2021 9:30 a.m.

Hello, I'm TD Clari!

What can I help you with today?

Show my balance   How do I

Ask me something

TD Clari

January 5, 2021 9:30 a.m.

Hello, I'm TD Clari!

What can I help you with today?

Renew my GIC

Not sure what you mean. Please ask a different way.

Ask me something

TD Clari

January 5, 2021 9:30 a.m.

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Chat with live agent

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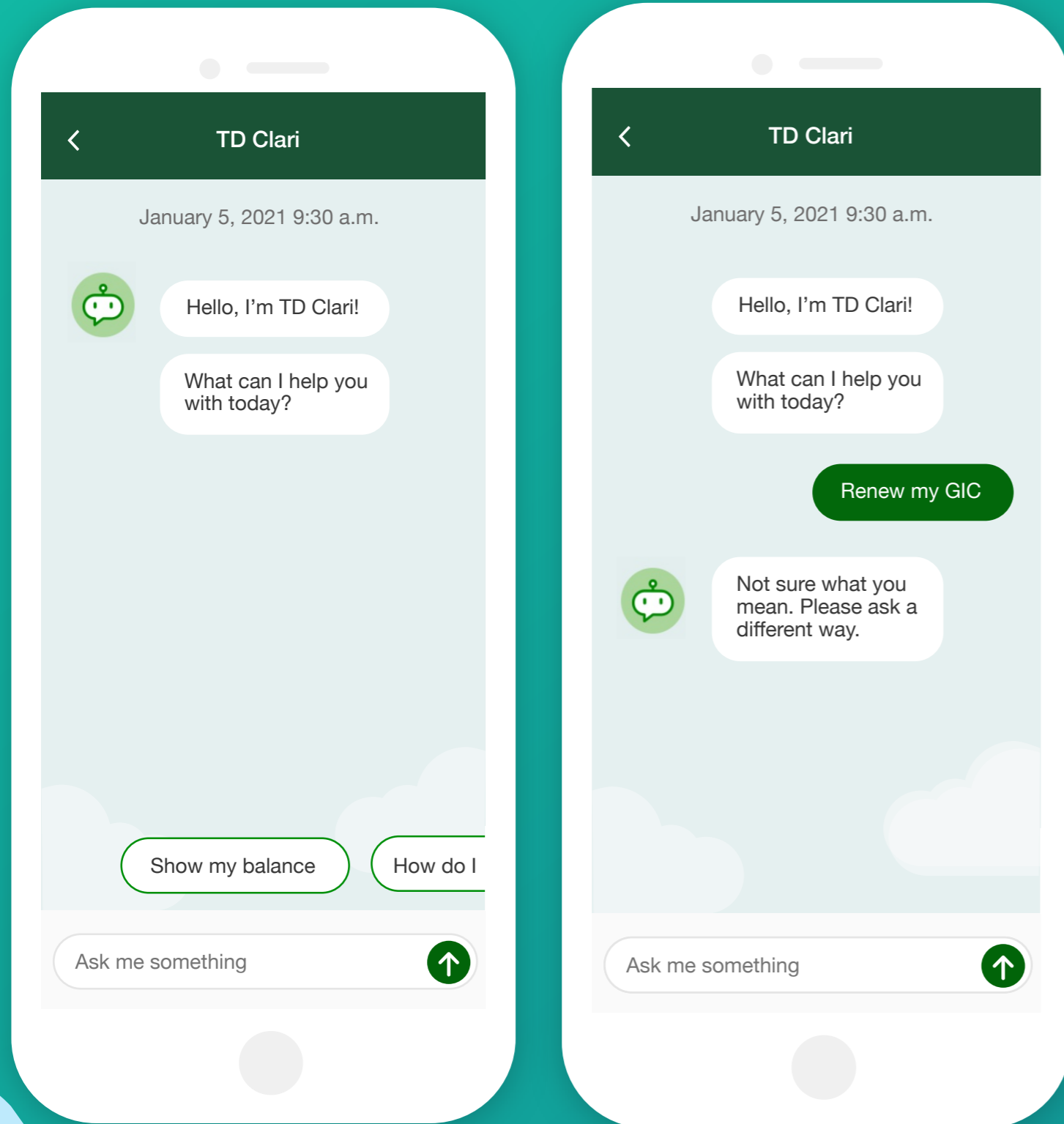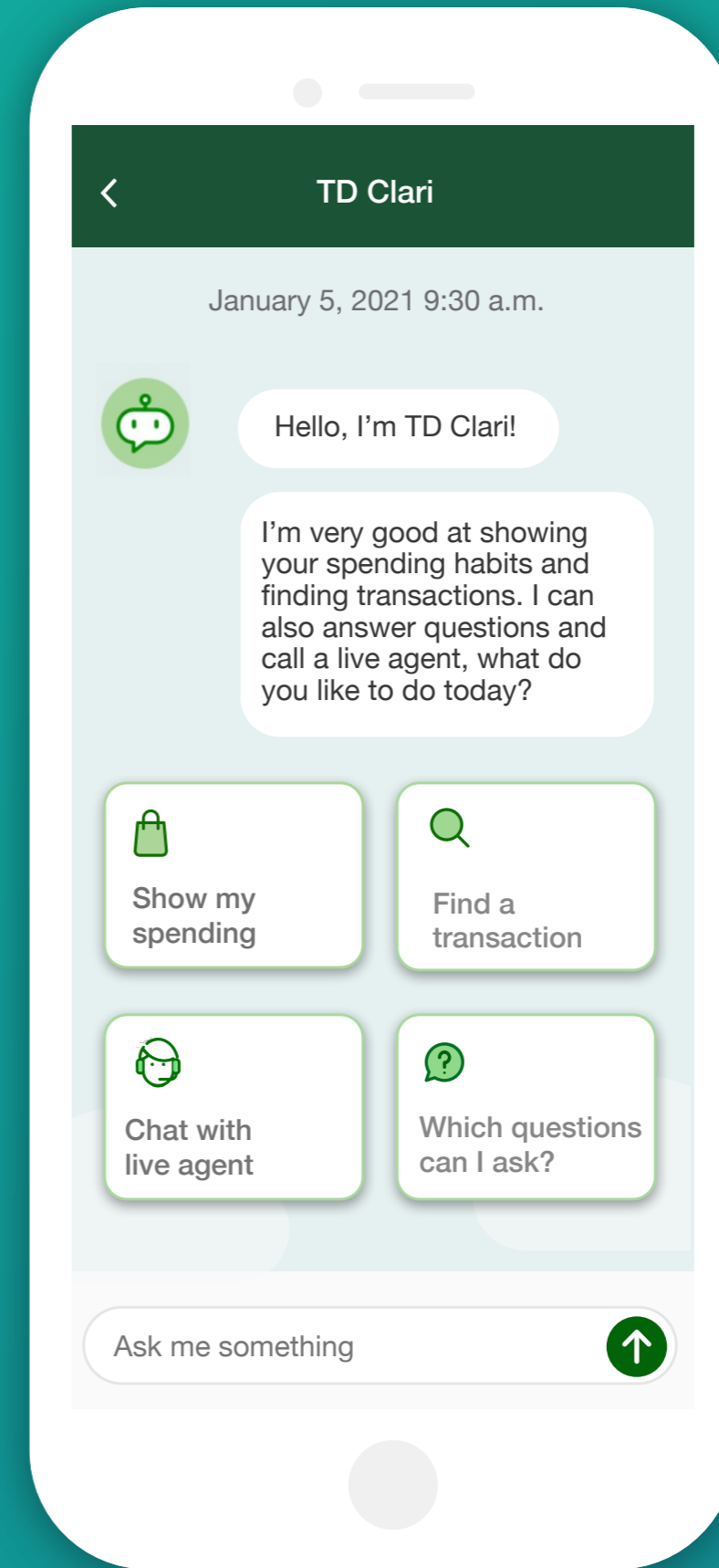

Intro ends with an open question

Customers are led to select within the areas the chat bot can support

Clari

Live agent integration

TD Clari

JAN 5, 9:30 a.m.

Hello, I'm TD Clari!

Ask me something
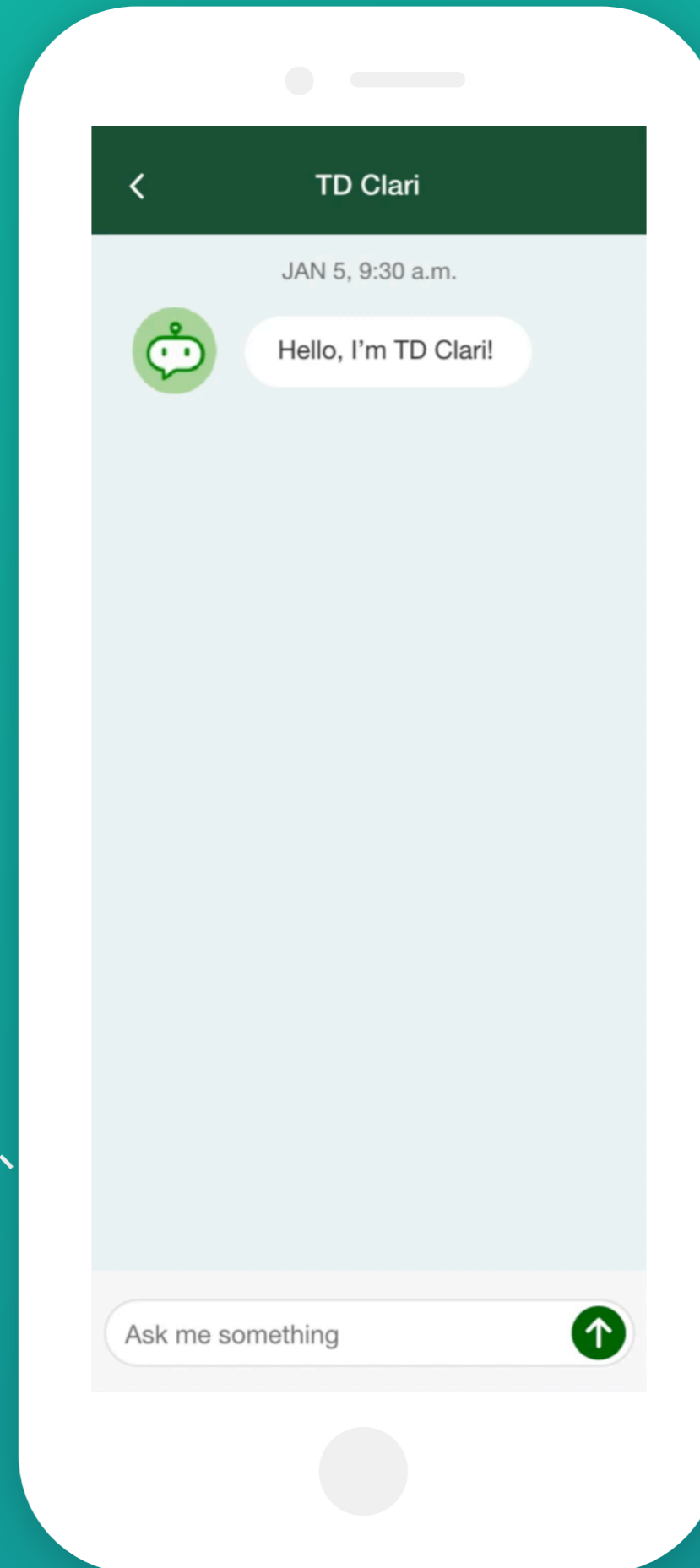
Click through - wireframes

Clari

Dynamic answers

Clari refines customer's intent when the questions are not clear, reducing errors.

How to do a transfer

Okay, what kind of transfer are you thinking about?

Transfer between accounts   Transfer to someone   Something else

Conversations are organic

Promote action

Clari wants the conversation to continue.

How to do a transfer

Okay, what kind of transfer are you thinking about?

To my accounts

Got it. I have an article that can help you with transfers between accounts

Content

Transfer now

Do you want me to do a transfer for you? Just ask me.

Yes, do a transfer   What are the transfer fees?

Keep context

But customers could change the topic of the conversation anytime.

Make a transfer

Okay, what kind of transfer are you thinking about?

What are the transfer fees?

Here is what I know about fees.

Content

Do you still want to do a transfer?

Yes, do a transfer   Never mind

Dialog wireframe

Transfer

Okay! What kind of transfer you would like to know about?
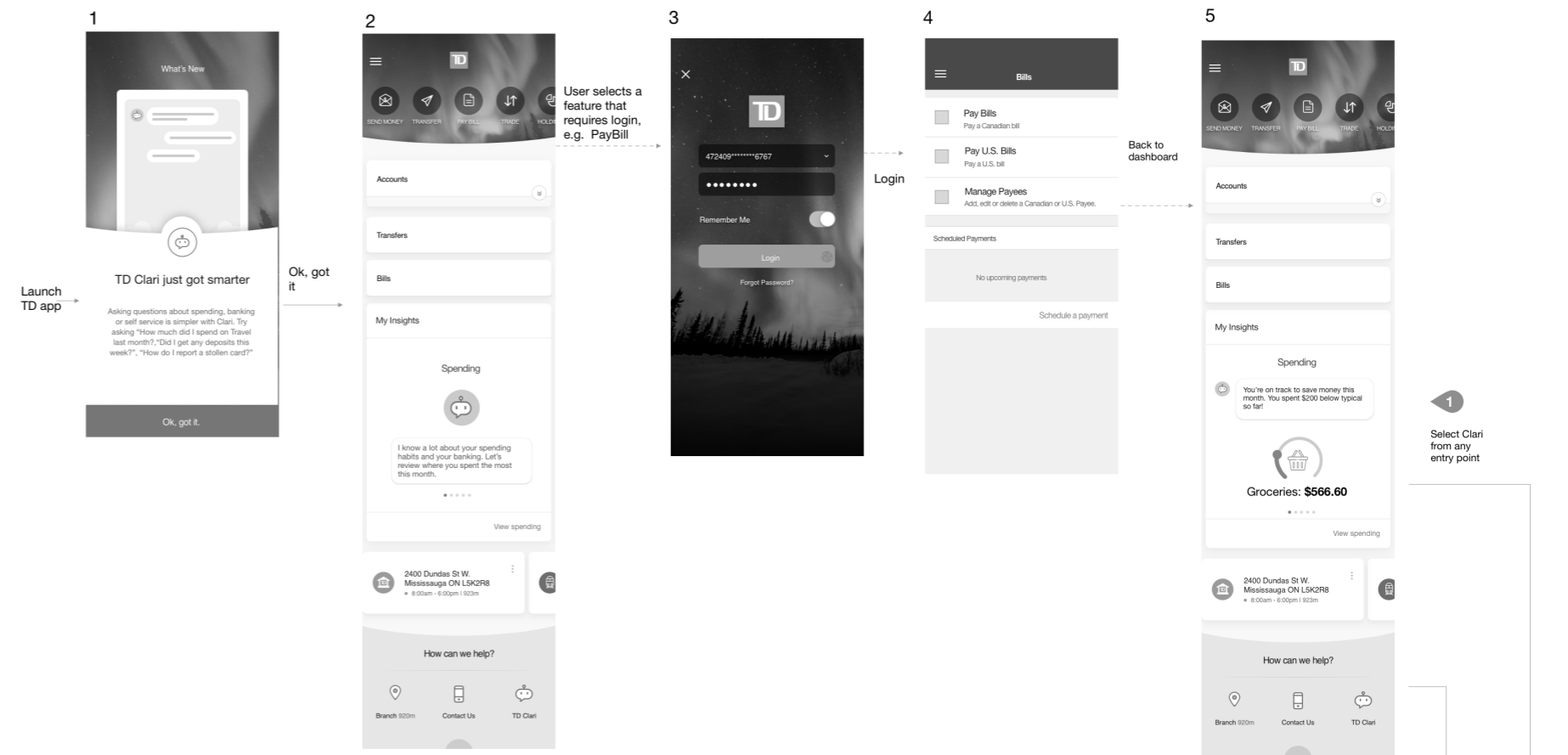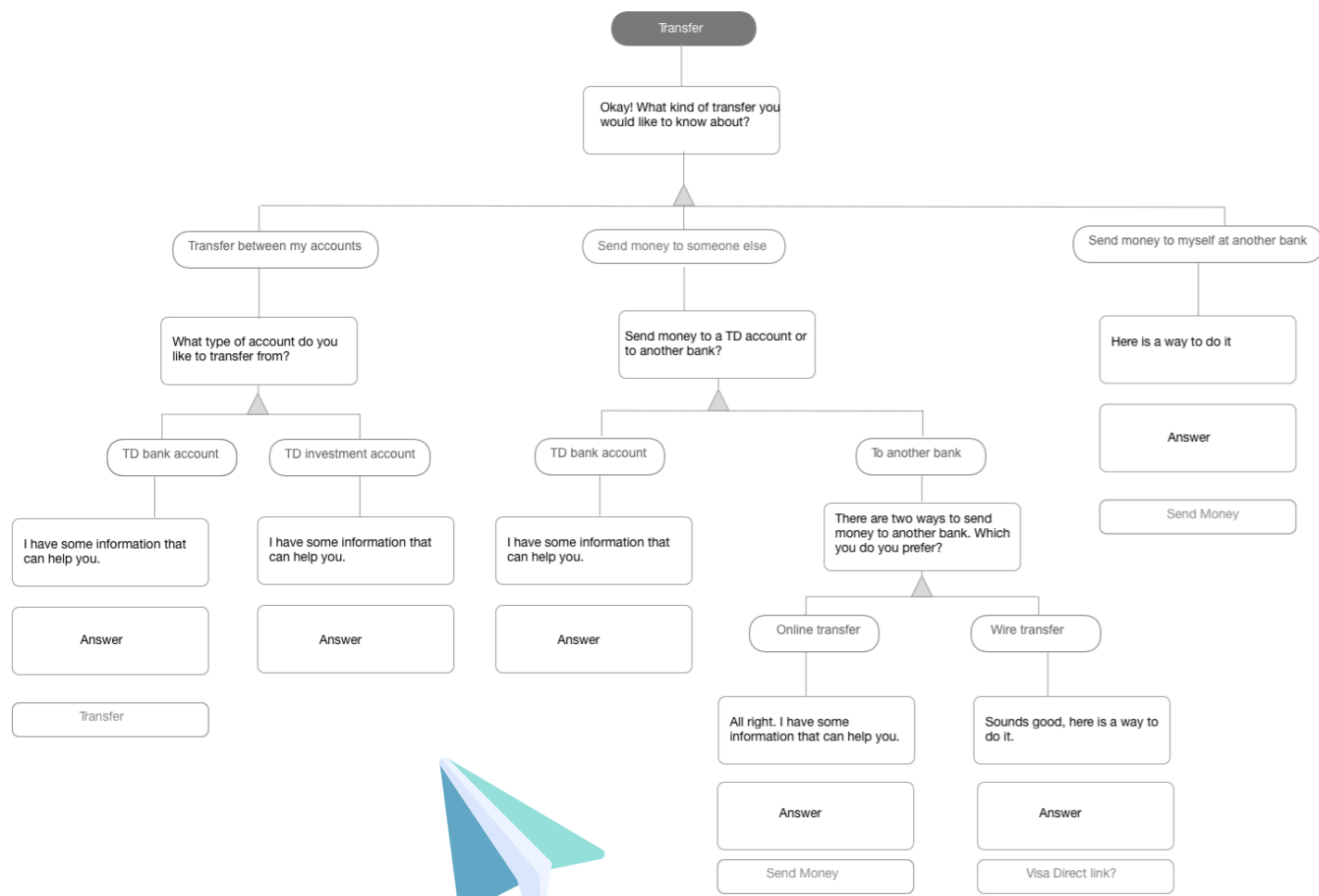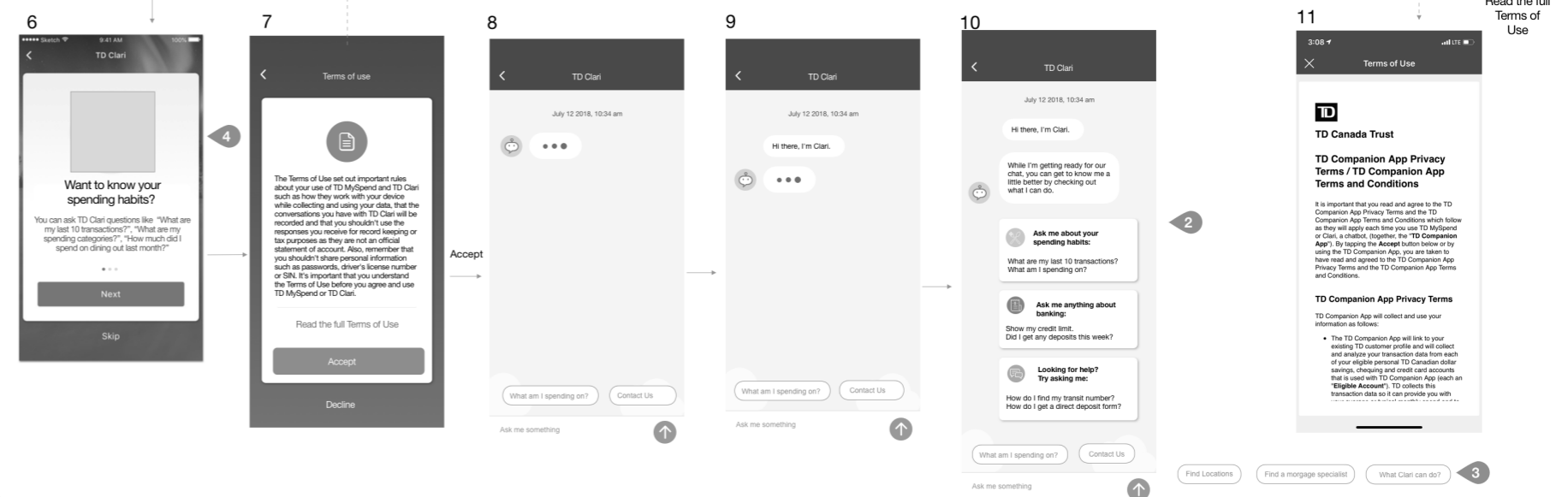
Transfer between my accounts

Send money to someone else

Send money to myself at another bank

What type of account do you like to transfer from?

Send money to a TD account or to another bank?

Here is a way to do it

Answer

Send Money

TD bank account

TD investment account

TD bank account

To another bank

I have some information that can help you.

I have some information that can help you.

I have some information that can help you.

There are two ways to send money to another bank. Which you do you prefer?

Answer

Answer

Answer

Transfer

Online transfer

Wire transfer

All right. I have some information that can help you.

Sounds good, here is a way to do it.

Answer

Answer

Send Money

Visa Direct link?

This is happening behind the scenes when customers ask one simple question. We use Kasisto engine. We feed and customize the platform.
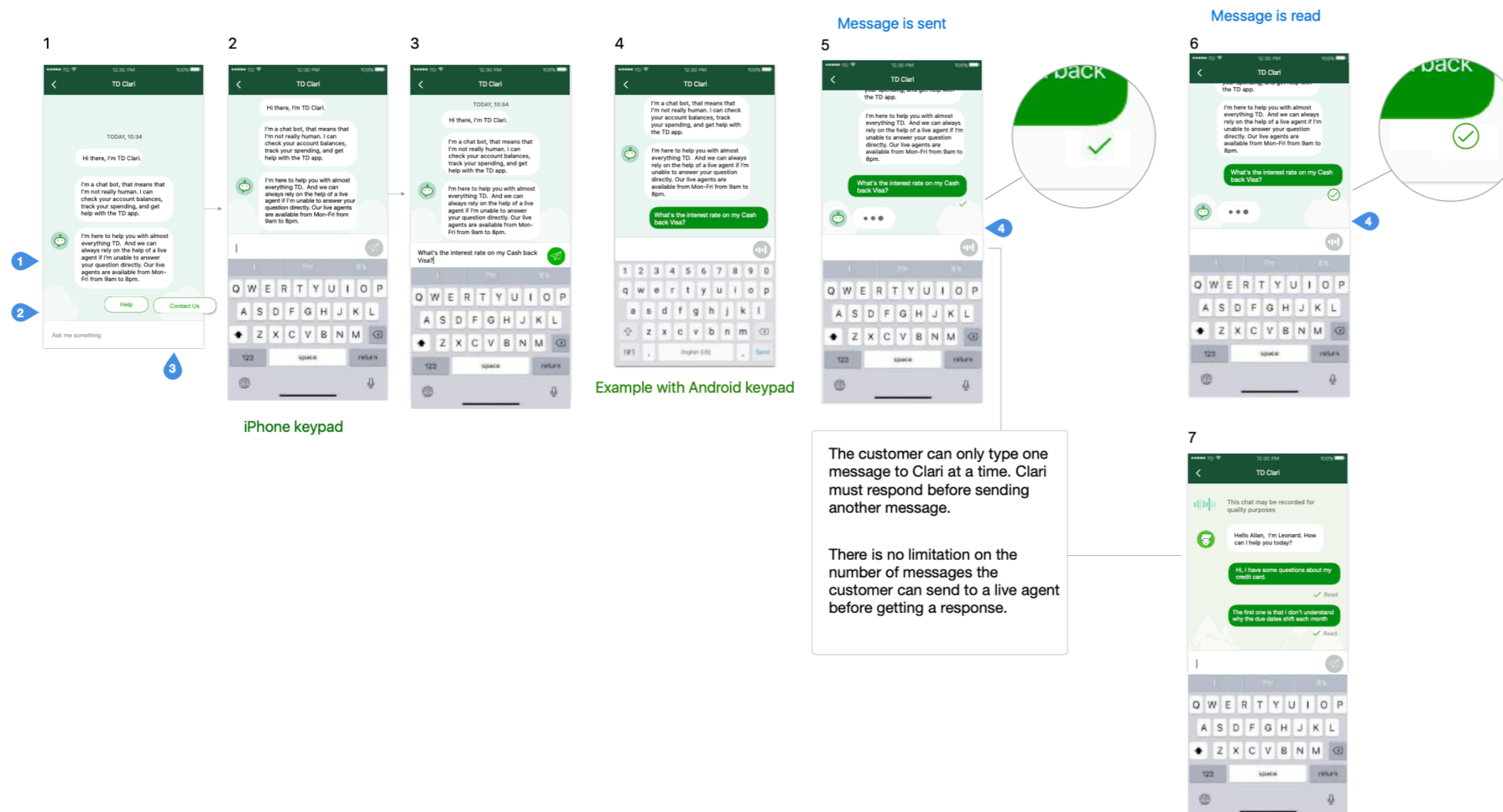
Product wireframe

1

What's New

TD Clari just got smarter

Asking questions about spending, banking or self service is simpler with Clari. Try asking "How much do I spend on Travel last month?", "Did I get any deposits this week?", "How do I report a stolen card?"

Ok, got it.

Launch TD app

Ok, got it

2

Accounts

Transfers

Bills

My Insights

Spending

I know a lot about your spending habits and your banking. Let's review where you spent the most this month.

View spending

2400 Dundas St W.
Mississauga ON L5K2R8
8:00am - 6:00pm | 923m

How can we help?

Branch 920m   Contact Us   TD Clari

User selects a feature that requires login, e.g. PayBill

3

472409********6767

Remember Me

Login

Forgot Password?

Login

4

Bills

Pay Bills
Pay a Canadian bill

Pay U.S. Bills
Pay a U.S. bill

Manage Payees
Add, edit or delete a Canadian or U.S. Payee.

Scheduled Payments

No upcoming payments

Schedule a payment

Back to dashboard

5

Accounts

Transfers

Bills

My Insights

Spending

You're on track to save money this month. You spent $200 below typical so far!

Groceries: $566.60

View spending

2400 Dundas St W.
Mississauga ON L5K2R8
8:00am - 6:00pm | 923m

How can we help?

Branch 920m   Contact Us   TD Clari

Select Clari from any entry point

6

Want to know your spending habits?

You can ask TD Clari questions like "What are my last 10 transactions?", "What are my spending categories?", "How much did I spend on dining out last month?"

Next

Skip

7

Terms of use

The Terms of Use set out important rules about your use of TD MySpend and TD Clari such as how they work with your device while collecting and using your data, the conversations you receive with TD Clari will be recorded and that you shouldn't use the responses you receive for record keeping or tax purposes as they are not an official statement of account. Also, remember that you shouldn't share personal information such as passwords, driver's license number or SIN. It's important that you understand the Terms of Use before you agree and use TD MySpend or TD Clari.

Read the full Terms of Use

Accept

Decline

Accept

8

TD Clari

July 12 2018, 10:34 am

What am I spending on?   Contact Us

Ask me something

9

TD Clari

July 12 2018, 10:34 am

Hi there, I'm Clari.

What am I spending on?   Contact Us

Ask me something

10

TD Clari

July 12 2018, 10:34 am

Hi there, I'm Clari.

While I'm getting ready for our chat, you can get to know me a little better by checking out what I can do.

Ask me about your spending habits:
What are my last 10 transactions?
What am I spending on?

Ask me anything about banking:
Show my credit limit.
Did I get any deposits this week?

Looking for help?
Try asking me:
How do I find my transit number?
How do I get a direct deposit form?

What am I spending on?   Contact Us

Ask me something

11

Terms of Use

TD Canada Trust

TD Companion App Privacy Terms / TD Companion App Terms and Conditions

It is important that you read and agree to the TD Companion App Privacy Terms and the TD Companion App Terms and Conditions which follow as they will apply each time you use the TD MySpend or Clari, a chatbot, together, the "TD Companion App"). By tapping the Accept button below or by using the TD Companion App, you are taken to have read and agreed to the TD Companion App Privacy Terms and the TD Companion App Terms and Conditions.

TD Companion App Privacy Terms

TD Companion App will collect and use your information as follows:

• The TD Companion App will link to your existing TD customer profile and will collect and analyze your transaction data from each savings, chequing and credit card accounts ("Eligible Account"). TD collects this transaction data so it can provide you with

Find Locations   Find a mortgage specialist   What Clari can do?

Read the full Terms of Use

Clari

6. Typing & Sending a message

Authenticated Messaging

Message is sent

Message is read

1   2   3   4   5   6

iPhone keypad

Example with Android keypad

The customer can only type one message to Clari at a time. Clari must respond before sending another message.

There is no limitation on the number of messages the customer can send to a live agent before getting a response.

7

Notes

1. Clari introduces the hability to access a live agent.
2. The background and visual indicators to create context on chatting with Clari are detailed on VD package.
3. Help opens the help screen.
4. Indication of read/received message. Applies to bot and agent.

Clari

What success looks like
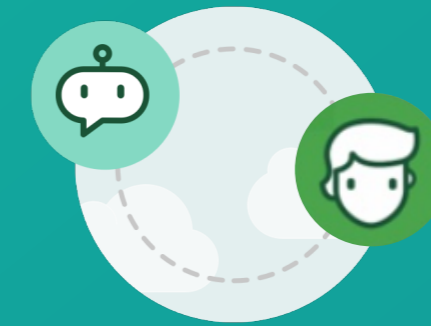
Next steps: track analytics and listen to our customers as we release each module.

◆ Increased customer satisfaction

◆ Metrics indicate high call volume questions are being answered by the bot and agent

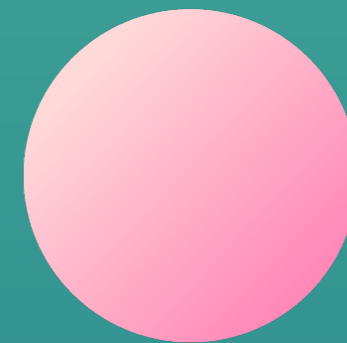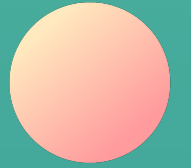◆ Increased adoption of the feature (new users) and continue use over time (retention)
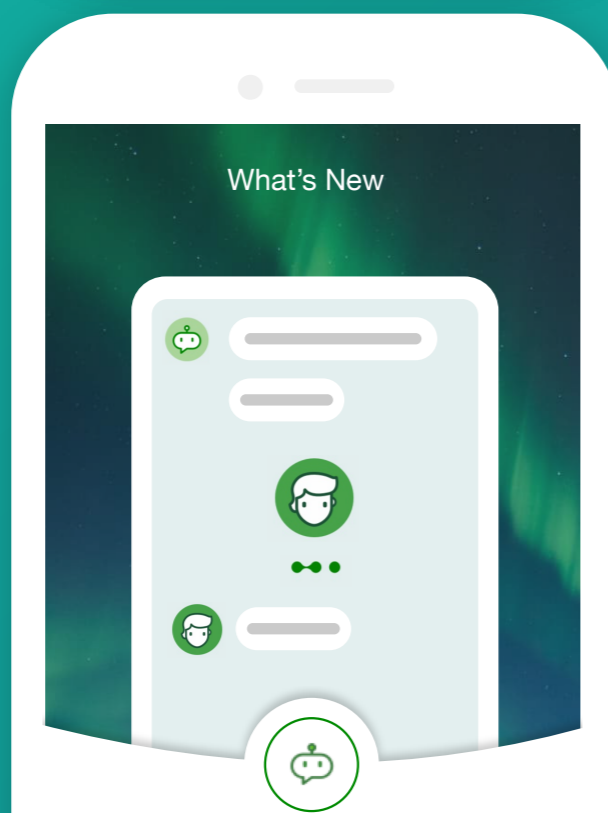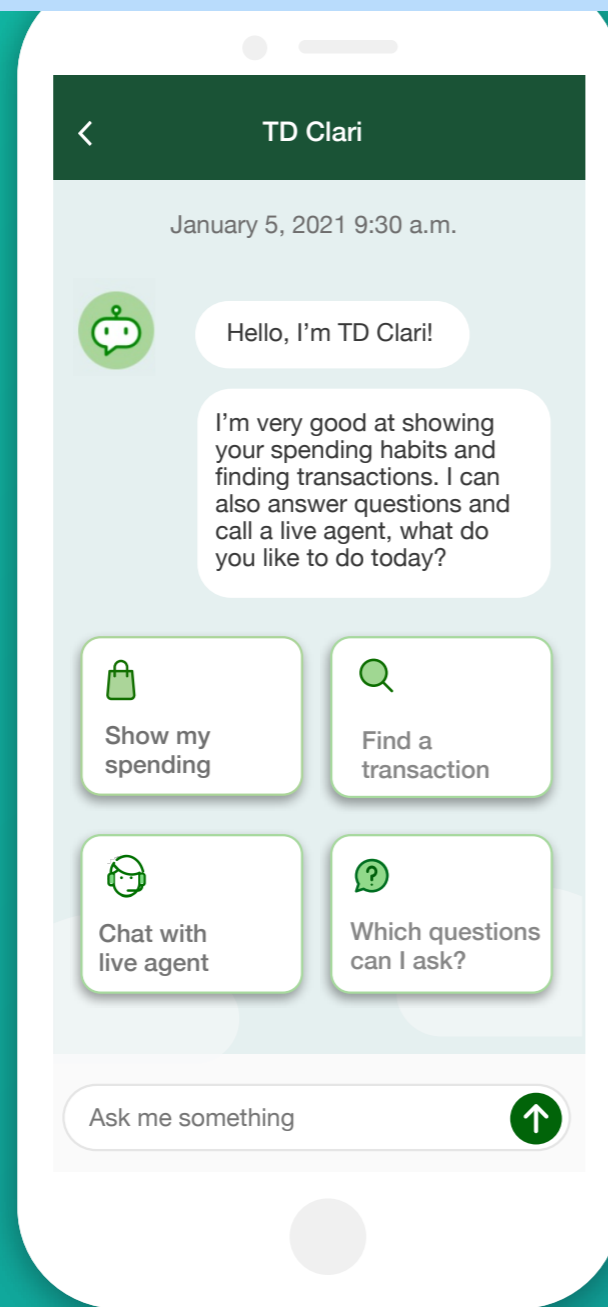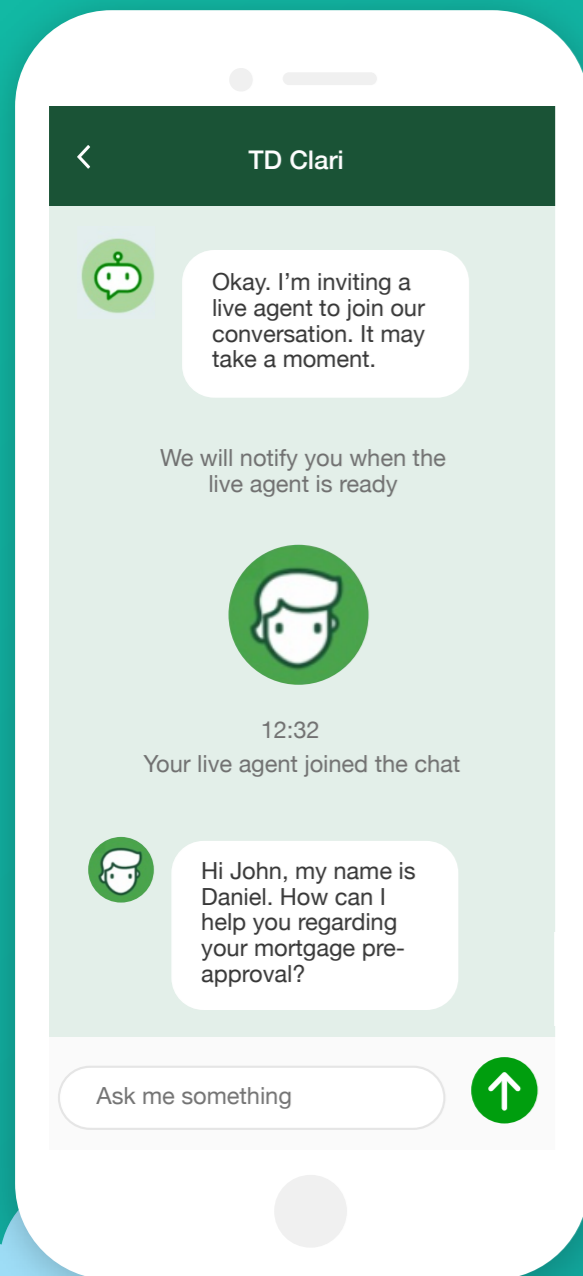
Thank you!

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