# Campaign management using conversational AI

# Project overview

**The product:**

A tool using conversational AI to achieve high-performance automation for tedious work and optimize business processes.

**Project duration:**

1 months

Google

# Project overview

**The problem:**

The client's need was to facilitate the management and creation of marketing campaigns.

**The goal:**

Facilitate the management and creation of marketing campaigns.

Google

# Project overview

**My role:**

UX UI designer

On this project, I collaborated with a business

designer.

**Responsibilities:**

- Define personas and user journey maps

- Rapid prototyping

- Visual design of low-fi and high-fi wireframes

Google

# Understanding the user

- User research
- Personas
- User journey maps

# User research: summary

To understand user frustration, needs, and requirements, I participated to user research through the creation of personas and user stories. My mission was to use the data collected by the business designer (user interviews and empathy maps) to clarify roles and needs of the users so that I can better design the app.

# User research: pain points

## 1

### Pain point

Marketers have access to a large amount of customer data (behavior, purchase history, demographics) but find it difficult to analyze it quickly to gain actionable insights.

## 2

### Pain point

It is common for two teams to launch similar campaigns (same offer or same message) targeting the same customer segments over similar periods of time.

## 3

### Pain point

When setting up campaigns, manual errors are common. Marketers must manually verify that each element of the campaign complies with internal brand guidelines.

# Persona: **Ria**

## Problem statement:

Ria is a Marketing Manager who needs tools to automate verification tasks because she wants campaign uniqueness and accelerate the campaign creation process.

### Ria

**AGE** 27
**WORK** Marketing Manager
**LOCATION** Bengaluru, India
**TECH LITERATE** High

" As Marketing Manager, I aim to quickly check whether a similar campaign already exists and, if not, to create a new one, in order to ensure the uniqueness of each campaign.

**Bio**

Ria is a Marketing Manager with over five years of experience in brand strategy and digital marketing. She leads regional campaigns across multiple Nestlé product lines. Her passion for innovation drives her to explore tools that enhance team efficiency and ensure campaign originality.

**Core needs**

- Ensure campaign uniqueness by verifying existing occurrences
- Streamline campaign creation to save time and optimize marketing workflows.
- Enhance company's marketing efficiency with data-driven decision-making.

**Frustrations**

- Difficulty identifying campaigns within the company and its offshore teams.
- Manual approval processes that delay campaign launches.
- Lack of integrated insights from previous campaigns leading to inefficiencies.

# Persona: **Joshua**

**Problem statement:**

Joshua is a marketing manager who needs tool to search for duplicate campaigns across our marketing database because he wants maintain unique, effective campaigns without manually checking for overlaps.

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### Joshua

**AGE** 35
**WORK** Marketing Manager
**LOCATION** Vevey, Switzerland
**TECH LITERATE** High

❝ As Marketing Manager, I want a tool to search for duplicate campaigns in our marketing database to ensure that our campaigns remain unique and effective, without having to manually check for overlaps.

**Bio**

Joshua is a seasoned marketing director at Nestlé, responsible for overseeing a broad portfolio of global and regional campaigns. With many years of experience in digital marketing and brand management, he understands the importance of maintaining the distinct identity of each campaign.

**Core needs**

- To detect overlapping marketing campaigns.
- Maintain a clear, distinctive brand voice across all campaigns.
- Optimize time and resources by reducing manual campaign audits.

**Frustrations**

- Manually tracking hundreds of campaigns for similarity is time-consuming and error-prone.
- Duplicate themes cause confusion among target audiences and dilute company's messaging.
- Current tools do not offer intelligent suggestions or pattern recognition to prevent overlaps.

# User journey maps: summary

The user journey maps allows us to visualize the critical stages where AI must excel in order to deliver value:

Identify Pain Points at Each Stage

Design Solutions for These Moments

Define Dialogue Flows

Adapt Tone and Information

# User story: **Ria**

Ria uses a conversational AI assistant to ensure that her new campaign idea is unique before initiating a new project. The AI helps her verify existing campaigns, guiding her to create a new one if no duplicates are found.

| PHASES | PHASE 1 | PHASE 2 | PHASE 3 | PHASE 4 | PHASE 5 | PHASE 6 |
|---|---|---|---|---|---|---|
| **ACTIVITY** | Ideation & Need Trigger | Starting the Campaign Search | Refining and Reviewing Results | Confirming Uniqueness & Launch | AI-Guided Campaign Creation | Saving and Tracking |
| **ACTIONS** | Has a new campaign idea (e.g., Sustainable Packaging Gen Z). Connects to the AI tool. | Asks the AI: "Is there an existing campaign focused on promoting sustainable packaging to Gen Z?" | (If matches found) Receives a list of similar campaigns. Refines by asking: "Show me any campaigns related to sustainability launched in the past year." | (If no exact match) The AI confirms uniqueness. Ria replies: "Yes, would you like to start a new campaign on this topic?" | Answers the AI's prompts (Title, Objective, Audience, Timeline). "What's the main message of the campaign?" | The AI confirms the saving: "Your new campaign has been created successfully." |
| **THOUGHTS** | "This idea is great, but has someone already done it? I hope I don't waste time starting it if it already exists." | "I'll test how smart the AI is. Will it understand my intent or just the exact keywords?" | "Okay, the AI found relevant things. I need to make sure there's no exact duplicate before moving forward." | "Great, it's unique! I haven't wasted my time. Let's see if the AI can really speed up the initial launch." | "This is much faster than filling out a long form. The AI is just asking me the essential questions for the draft." | "It's done, the project is officially launched! Now I can move on to strategy without being blocked by the initial verification." |
| **PAIN POINTS** | Redundancy Risk: Need to verify, previously the manual search process was potentially long. | Search Ambiguity: Traditional systems might require precise filters and keywords. | Manual Duplicate Analysis: Must read each description to assess the actual overlap. | Process Jump: Moving from search to creation in the old system often meant switching to another tool. | Data Entry: Long forms or multiple fields to fill in traditional systems. | Status Uncertainty: Might have to manually check if the draft was saved in the database. |
| **EMOTIONS** | 😐 | 🤔 | 🙂 | 😀 | 🙂 | 🤩 |
| **OPPORTUNITIES** | Instant Availability: The AI is always ready to receive a natural language query. | Contextual Understanding: The AI uses NLP to understand the intent and business context. | Automatic Synthesis: The AI could indicate the % overlap with the new idea. | Seamless Transition: Instant creation launch without changing the interface. | Conversational Interaction: The AI guides the user step-by-step, reducing cognitive load. | Immediate Confirmation: Positive feedback and immediate action (link to the draft) from the AI. |

# User story: **Joshua**

Joshua oversees a vast number of campaigns, making it challenging to track potential overlaps in themes, messaging, or visuals.

Duplicate campaigns can lead to inefficiencies, brand inconsistency, and wasted resources. An AI-based solution would streamline his work by automatically detecting duplicates based on content patterns, metadata, and historical campaign insights.

| PHASES | PHASE 1 | PHASE 2 | PHASE 3 | PHASE 4 | PHASE 5 |
|---|---|---|---|---|---|
| ACTIVITY | Proactive Monitoring | Understanding Results | Analysis Refinement | Corrective Action (Modification) | Corrective Action (Archiving) |
| ACTIONS | Starts the analysis session by opening the AI assistant and saying: "Check for any duplicate campaigns related to our recent holiday season promotions." | Receives a list of potential duplicates with a similarity score and explanation (e.g., "Same theme and target audience"). | Questions the AI to prioritize: "Which campaigns have the highest similarity?" or "Why was this flagged as a duplicate?" | Decides to save one campaign and modify another. Asks: "How can I modify this campaign to reduce overlap?" | Decides to eliminate the oldest duplicates. Asks: "Archive duplicates except the most recent one." |
| THOUGHTS | "I need to make sure teams haven't duplicated efforts during the crucial holiday period. Manual verification would take half a day." | "I have 5 potential duplicates. The AI found the visual similarity between these two... Interesting." | "I need to start with the highest risk. I need to understand the algorithm: why does it think it's a duplicate?" | "I don't want to archive it, I want to save it. What does the AI suggest to quickly differentiate it without losing the core idea?" | "I need to clean up the database. I don't have time to open every campaign file to click 'archive'." |
| PAIN POINTS | Data Volume: The scale of campaigns to monitor makes manual verification almost impossible. | Detection Opacity: Classic tools don't always justify why something is considered a duplicate. | Decision Making: Need to sort and prioritize action among the many results. | Time-Consuming Rework: Modifying a message or targeting to differentiate it takes time. | Repetitive Tasks: Executing administrative tasks on a large number of items is tedious. |
| EMOTIONS | 😩 | 🤔 | 😐 | 🙂 | 😃 |
| OPPORTUNITIES | Globalized Analysis: The AI scans all databases with a single conversational query. | AI Transparency: The similarity score and explanation (based on theme, visual, segment) increase Joshua's confidence. | Conversational Decision Aid: The AI filters and provides the necessary justification metadata for prioritization. | Editing Suggestion: The AI uses its duplicate analysis to propose targeted modifications (e.g., target a different age group, rephrase the CTA). | Action Automation: The AI executes the administrative action via a simple voice or text command, streamlining the work. |

# Starting the design

- Low-fidelity prototype
- Usability studies

# Low-fidelity prototype

I created a low-fidelity prototype to test functionality before incorporating it into the final design to ensure all essential features and workflows are captured.
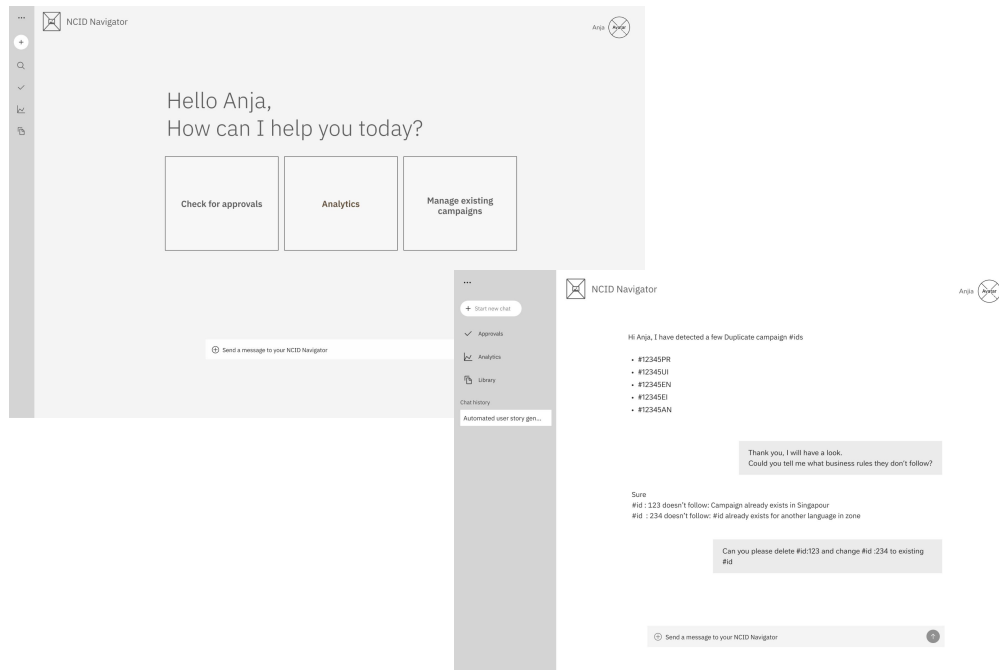
# Usability study: findings

Now that I have the key insights from the usability study, let's look at the findings and define the actual problems that a designer can solve.

## Finding 1

The user is unsure whether the AI is analyzing or waiting for a response. Detail missing: The loading indicator is unclear, or the AI chat bubble does not show that it is "typing."

## Finding 2

Users have difficulty figuring out how to start a new task or find examples of accepted commands. Detail missing: Help prompts or initial command suggestions are missing or not visible.

# Refining the design
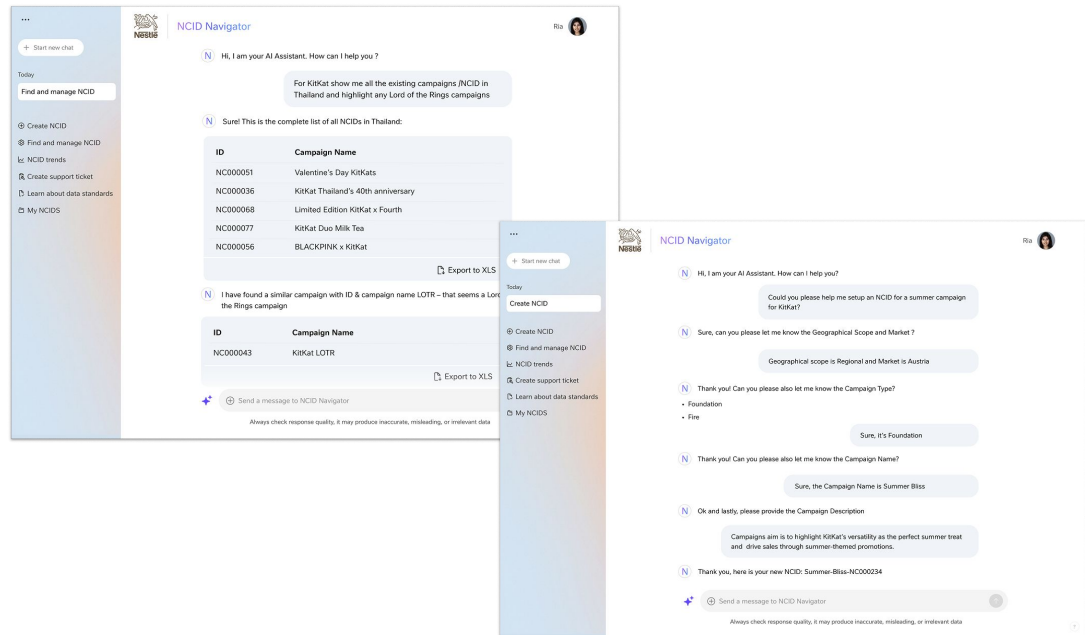
- High-fidelity prototype
- Accessibility

# High-fidelity Prototype: **Ria's user story**

After finalizing the low-fidelity wireframes, I worked on creating the final designs with the goal of making them simple and intuitive.
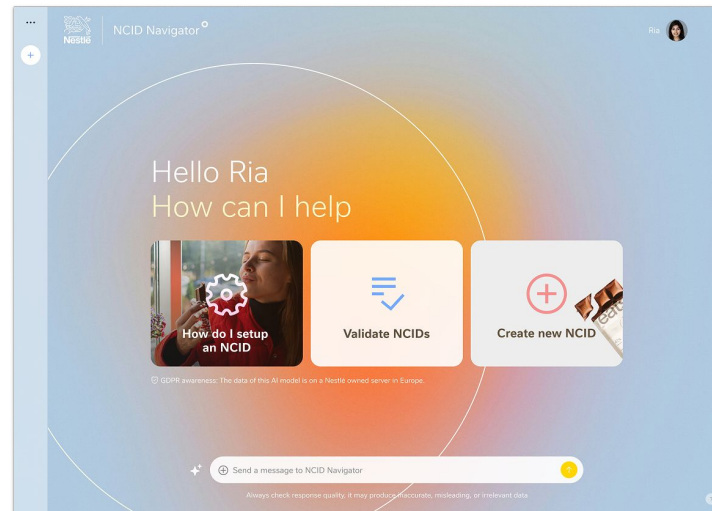
# High-fidelity Prototype: **Ria's user story**

This conversational AI makes it seamless for Ria to verify the uniqueness of her campaign idea and quickly initiate a new campaign if none exist, allowing her to work efficiently while maintaining brand consistency across campaigns.

# High-fidelity Prototype: **Joshua's user story**

This conversational AI tool simplifies the process, allowing Joshua to quickly identify, understand, and manage duplicate campaigns through a natural, conversational interface. This enhances efficiency, consistency, and strategic decision-making in campaign management.
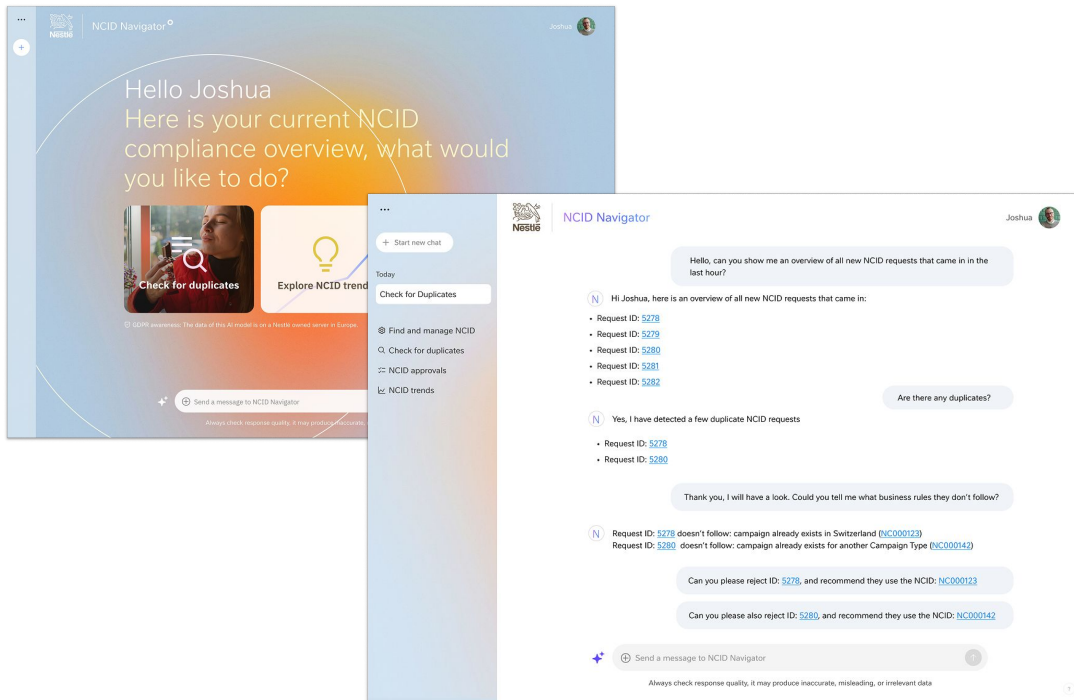
# Accessibility considerations

**1**

The entire interface must be navigable and usable using only the keyboard. This includes the chat window, text input, and activation of action buttons suggested by the AI.

**2**

All content, including AI responses, labels, and actions, must be properly tagged with ARIA (Accessible Rich Internet Applications) roles and attributes.

**3**

Comply with WCAG AA contrast ratios (at least 4.5:1 for normal text) between text (responses and queries in the chat window) and the background.

# Going forward

- Takeaways

# Takeaways

**Impact:**

The implementation of a marketing campaign management tool based on conversational AI (Watson X) will have a direct transformational impact on the company's operational efficiency and marketing performance. The main impact lies in significantly reducing campaign time-to-market and improving overall return on investment (ROI) by ensuring that every customer communication is unique, relevant, and consistent with the brand image.

**What I learned:**

As a UX UI designer, I have gained valuable insights and knowledge through the design process. Some of the key things I have learned include:

- The importance of simplicity in conversational effectiveness versus aesthetics
- Accessibility in conversational design

# Let's connect!

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