

Create the advisor concept



What is the Advisor Concept?

This page and its subpages describe how to **create the Advisor Concept** in order to offer **great conversational experiences** and **Guided Selling solutions**.

The *Advisor Concept*, or *Product Guide Concept*, **contains all Topics within the Advisor or Product Selector**, the **Question Flow** (i.e. sequence and dependencies how the Topics are presented) and also the idea of what **products to recommend** in which situation.

The Workbench is designed to **create smart and powerful Advisor Concepts** which leverage the **knowledge of your best product and sales experts**.



Advisor Concept and Guided Selling

Product Guides are based on the concept of Guided Selling. Just by asking your customers a few relevant questions, Guided Selling recommends each individual customer to see the ideal product for their requirements. Click the following links to read more about [Guided Selling](#) and [Product Guides](#).

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What is the concept board?

All steps of building the Product Guide concept and connecting it to your product data are performed in the [Concept Board View](#). It can be reached by clicking the linked Product Guide name within the Product Guide overview table (see [Add a Product Guide](#)).

Idea behind the Concept Board

Creating **successful** Product Guides is about having a **smart and structured advisor concept**. That is why excentos has arranged all major conceptual steps of developing Product Guides in the Concept Board.

The Workbench is designed to provide you maximum support in **freely editing and changing** the advisor concept and **connecting it with the product data**. To provide you a good overview, all Stages, Questions and Answer Options are displayed clearly within the Concept Board. Their positions are easily changeable via [drag and drop](#).

Depending on your situation, you can create the full concept first, or start with the product data, or do both iteratively at the same time (see [Start with Advisor Concept or Product Data?](#)). See also our [Product Guide Concept Manual](#) for **best practices** and **do's and don'ts** when developing your Product Guides.

Elements of the concept board

The documentation about **developing the Product Guide Concept** contains the following pages that each describe the elements configurable in the Concept Board:

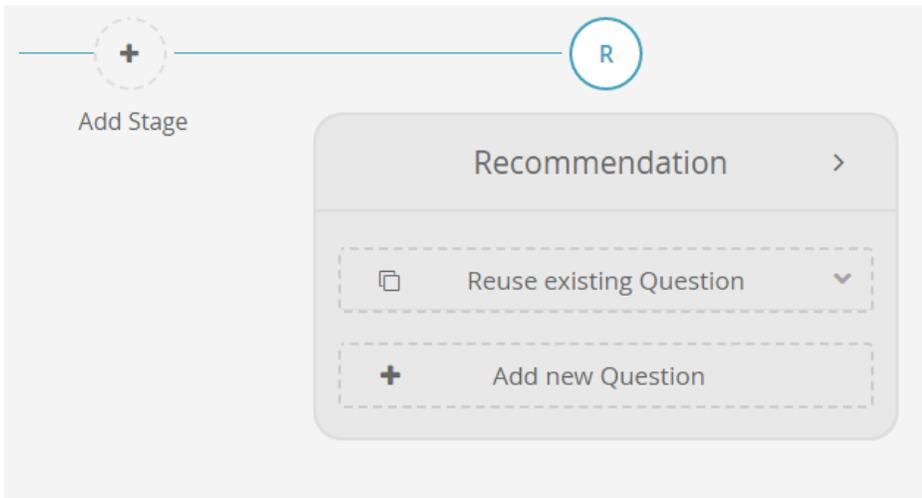
- [Stages](#)
 - [Stage Properties](#)
 - [Recommendation Stage](#)
- [Questions and Answer Options](#)

- General Properties
- Data Binding and Connections
- Answer Option Type
- Matching and Reasoning
- Preselection Configuration
- Set the Visibility
 - Hide non-matching Answers
- Explanation Content
- Concept Board Action Bar
- Rule Builder Modal Window

Concept board view

Initial (Empty) view

When you first enter the Concept Board of a newly created Product Guide, the view only contains three default components which help you to start building your advisor concept. This includes adding [Stages](#), [Questions](#) and [Answer Options](#).



The three default components are:

1. **"Add Stage" button:**
Creates a new [Stage](#) in your Product Guide. After the creation process is finished the Stage can be filled with some questions.
2. **The Stage "Recommendation":**
The [Recommendation Stage](#) displays the product recommendations that fulfill the user requirements (i.e. the Answer Options the user selected). Since every Product Guide requires a Recommendation Stage, it is **not possible to delete** this Stage.
3. **Action bar:**
The action bar contains the two menu items "Visualization" and "Highlighting". Within the visualizations menu some graph visualizations can be found to show different connections in the *Concept Board*. The highlighting menu contains several variants to highlight certain concept elements with the same properties (coming soon). For more information, please look at [Concept Board Action Bar](#).

Cards organize the advisor concept

Every element of an advisor concept ([Stages](#), [Questions](#) and [Answer Options](#)) are visualized by **cards**. The Workbench uses this way of visualization since...

- the cards provide a fast overview of the entire advisor concept
- they provide drag and drop of entire Stages, Questions or Answer Options which gives you a quick and easy way to change the elements' order
- the card appearance is familiar from e.g. the Google Material Design

Drag and drop

Developing a good advisor concept implies testing of different alternatives. Therefore it is possible to drag and drop Stages, Questions and Answer Options. Simply **grab** the certain element **at its name label** and **drop** it on the wished position.

 **Further information:**

- All Stages, but the Recommendation Stage can be dragged and dropped. That is why the Recommendation Stage have to remain the last Stage in the Product Guide.
- Questions can be dragged and dropped within a Stage as well as to other Stages.
- Answer Options are only draggable within its Question.

Example

This is how the Concept Board might look like for a "Bike Advisor" Product Guide. The shown advisor concept below contains:

- 4 Stages - e.g. "Person" or "Activity"
- 1 Recommendation Stage
- 5 Questions - e.g. "Which activities do you plan to do?" or "What is your body size?"
- Corresponding Answer Options - e.g. "Cruising in the city", "Mountain biking", "Racing bikes", etc.

The screenshot displays the 'Concept Board' interface in Workbench. The board is organized into four stages, numbered 1 to 4, connected by a horizontal line. Stage 1, 'Person', contains two questions: 'For whom should the bike be?' with answer options 'Child', 'Woman', and 'Man', and 'What is your body size?' with answer options ranging from '< 140 cm' to '180 to 190 cm'. Stage 2, 'Activity', contains the question 'Which activities do you plan to do?' with answer options 'Cruising in the city', 'Mountain biking', 'Racing bikes', 'Tours and off-road trips', and 'BMX'. Stage 3, 'Features', contains the question 'Which features/equipment should your bike have?' with answer options 'Electric motor', 'Suspension', 'Lights', 'Rims with reflectors', 'Mudguard', 'Disc Brakes', and 'Bicycle racks'. Stage 4, 'Materials', contains the question 'From which material should the frame be made?' with answer options 'Aluminium', 'Titanium', 'Carbon', and 'Steel'. Each stage has an 'Add new Answer Option' button and a dashed box for 'Add new Question'. The interface includes a sidebar with navigation options like 'Product Data', 'Concept Board', 'Recommendation', and 'Publish'. The top navigation bar shows 'Product Guides', 'My Company', 'Hello admin', and 'Help'.

i Case Studies

Read our [case studies](#) to get ideas and some inspiration for your Product Guide.

Read on: Get to know [Stages](#) **or** [Questions and Answer Options](#)