

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 conceptional 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:

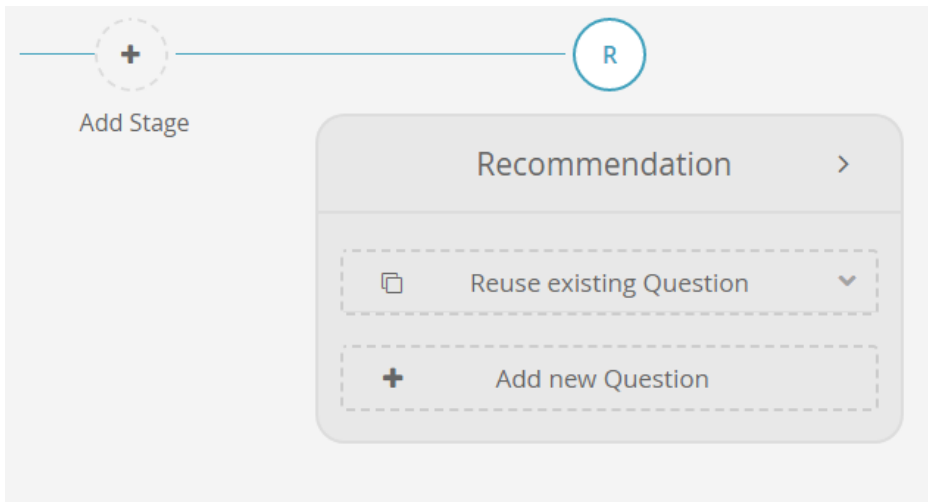
- [Stages](#)
 - [Stage Properties](#)
 - [Recommendation Stage](#)
- [Questions and Answer Options](#)

- 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.

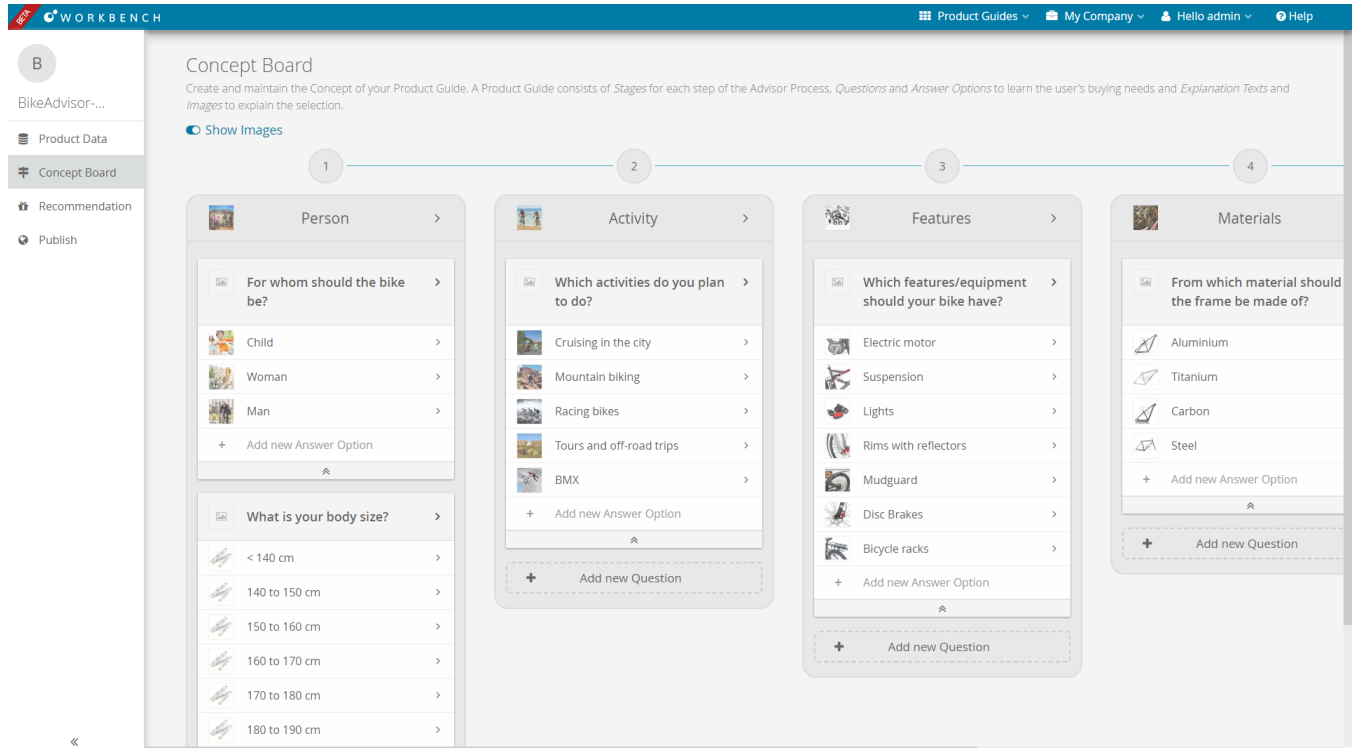
 **Further information:**

- 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.



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](#)