67 TIPS for Building Live Chat Success

Best Practices for Agents and Admins
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I. INTRODUCTION

For contact center agents and administrators, delivering an “average” customer experience can be challenging enough, let alone delivering an “exceptional” one. But great customer service isn’t a fantasy – hundreds of great companies deliver it daily. In fact, a recent Forrester study showed that the number of companies with “good” or “excellent” customer experience index scores has steadily increased between 2007 and 2014. And we know why. It’s not any fancy management and incentive system developed by fancy consultants from a fancy city in fancy suits.

It’s a combination of great people, great processes, and great technology.

I’m reminded of an interview I did with an outstanding chat agent at a customer site. I asked her if she preferred being on chat or answering the phones because, at this particular company, the agents were cross-trained to do both, though not simultaneously thankfully. I’ll never forget her response: “I love being on chat. I wish I could throw away my phone and always be on chat, every day.” I then asked her why she liked chat so much. What I expected in her answer was some flavor of, “It’s easier,” or “I don’t have to talk to them,” or “It’s quieter.” But that’s not what she said.

“I enjoy being able to help – I mean really help – more than one person at once.”

This agent was genuinely enthusiastic about live chat technology’s ability to support efficient concurrency. Was this excitement innate for her? Perhaps. And perhaps the company culture in which she worked attracted her, or nurtured it, or both. Certainly, the people are the most important thing, but the people will fail without the right support, the right processes and the right tools. This eBook is divided into three parts to help address all the ways a live chat implementation can be done successfully. Section one is about the all-important chat agent, section two is about the management of the agent, and section three is about how management can support chat. Together, these tips can help make your company’s dream of excellence become a reality.

- Ross A. Haskell
 Director, BoldChat Products
 LogMeIn

1. Forrester, The Customer Experience Index, 2014
II. Tips to Keep Agents at the Top of Their Game

1. Answer chats within 10 seconds, even if it’s with just a “hello.” Customers like to know that their service representative is ready the moment they are. Even if you are finishing up with another customer, take a moment to acknowledge them with a “Hi! I’ll be with you in just a minute,” message. That initial greeting will let them know you are just about ready to give them your full attention. If you can’t respond within 10 seconds, definitely respond within 20, as this is the average time would-be chatters will wait until giving up on the chat.

2. When serving returning customers, always refer to their chat history for context. Taking a moment to review previous customer service issues and the customer’s shopping history will give you a great deal of insight into the challenges a particular customer may have been facing and the questions they may have had. This is especially critical if they are following up on a previous issue. You can shine as a service professional by quickly understanding their issues and getting right to the heart of the matter.

3. Be professional, but also inject your personality into the chat. No one wants to talk to a robot. While you should use a professional demeanor, share yourself through your conversation. There is nothing wrong with a sense of humor or a witty comment, as long as it fits into the dialogue.

4. Don’t allow your attention to wander; make sure customers feel that you are focused on the chat and their specific needs. We all have days when our attention isn’t as laser focused as we’d like it to be. However, when you are working with a chat participant, you should be paying close attention to each of their comments and questions and responding accordingly.
5. Listen for important comments and feedback from customers that could lead to product improvements, new developments or better chats. Customers are the BEST source of feedback about your product or service. They may have thought of things that your development team never dreamed of. If you have a chat participant who makes a suggestion, make note of that and thank the customer!

6. Stay on the same page – literally. Co-browsing is a great way to streamline the chat process. If you can see and interact on the same page your customer is looking at, you will be able to quickly point out features that can answer their questions.

7. Be honest and direct if a customer asks a question you don’t have the answer to. The reality is that you simply won’t have the answer to every question. Accepting that from the moment you start to work will make it much easier to say, “I don’t know. Let me check.” Answering questions directly develops trust and honesty in the customer service relationship.

8. Work to shorten your average response time. While chat is certainly more streamlined than many other processes, realize that customers still don’t like to wait. Shorten your response times while being careful to maintain the quality of your prose.

9. Empathize and let the customer know that you understand their frustration. Customers, like everyone else, simply want to be understood. If you have someone in a chat who is emotional about their situation, let them know that you really do understand why they feel as they do. Then, work diligently to solve the problem, following up until the solution has been put into place.

10. Always ask for feedback after the session. Recap with your customer at the end of your session. Were they happy with the service? Do they have any suggestions as to how their experience could have been improved? Do they need additional information about anything you discussed? Debriefing gives the customer the opportunity to ask more questions and finish the conversation in a satisfying way. Always remind the customer to complete the official after-chat survey.
11. **Ask if they would be interested in additional services or products.** Checking in with chatters to see if they need additional service or would like to hear about additional products not only helps your company but can help the customer take advantage of special offers. Sales and new product or service releases are worth taking a moment to explain. Benchmarking shows that chatters, on average, purchase 55% more than non-chatters.

12. **Customer service agents should be friendly and happy to help.** Attitude counts! Sure, we all have a bad day once in a while, but customer service agents should have an attitude that encourages customers to participate in the chat. Being friendly and approachable is key. Remember that even though chat is a written format, chat participants can tell whether an agent is just getting through the day or thriving.

13. **Address each customer by name.** Chat participants are more than just chatters. By calling them by name, you are acknowledging that they are a person and more than just an account in a vast database.

14. **Use chat to build your reputation – ask satisfied customers to leave a message on your Facebook page or Tweet about you.** Building a great reputation is one of the keys to building a great business. Ask every satisfied customer if they’d be willing to help you out by leaving positive feedback on social media.

15. **Use professional language appropriate to your industry, but don’t be overly formal.** By nature, chat isn’t nearly as formal as, well... a meeting in a boardroom. There are certain environments that require more formality, such as the banking and medical industries. For others like retail or hobby-related enterprises, customer service agents can relax their language to better reflect the individual brand. Formal, no. Friendly, yes. Change language to adapt to the formality or informality of the business (e.g., finance vs. surf boards).

#LiveChatBestPractices: Share the wealth! Offer sales and new products to chatters.
16. **Do not use acronyms.** If your ABC isn’t doing the PDQ, your customer won’t have the foggiest idea what you are talking about. Limit your use of business-specific acronyms to conversations held between you and team members. Keeping your language understandable will go a long way to building openness and trust with customers.

17. **Provide articles that will educate customers.** Extra education for customers will help you assert yourself as an expert in your field. And expertise is the most valued attribute a chat agent can have. According to a survey of chat participants, among the top 10 factors that contribute to a chat session’s success, agent expertise about the products and services they represent is #1, with more than 90% of chatters selecting it.

18. **Allow for non-topical chatter about the weather, location or sports.** You should be friendly and can digress to more casual topics while you’re getting information or waiting for something. Chatting about general topics such as weather or vacation plans can make an agent seem human and friendly. Those characteristics build great customer relationships.

19. **Don’t give up on tough questions; you can win or lose customers that way.** Have a customer who brings you a tough question? Don’t throw in the towel. Take a moment to acknowledge that you haven’t seen that issue before and quickly get some help. Let your customer know that you will get them the answer, though it might take a minute. Persistence is the way to keep customers.

20. **Always be patient, no matter how frustrating the customer or request.** Did your customer want the blue one, not the red one, and is furious? The best way to respond is always with patience and professionalism. Quickly move to an action format and get their problem resolved. Resolution equals calm for both you and the customer.

21. **Write your answers in simple, clear language with proper grammar.** Chat is not texting. You should always use proper grammar and clear language that can be easily understood.
22. **Manners matter – say “please” and “thank you.”** Being polite to customers demonstrates professionalism and tact. “Please provide more detail,” “Thank you for being our customer” - these are small but important pieces of the conversation.

23. **Always inform a customer in the event that you have to transfer his or her chat to another agent who can better assist them.** While you should generally avoid having to transfer a chat at all – first chat resolution should always be the goal – sometimes it can’t be helped. In this situation, make certain you tell you the chatter that a transfer is going to take place and wait for them to acknowledge that they understand it. If you are the recipient of the transferred chat, see Tip #1.

24. **Ask for and incentivize referrals.** “Do you know someone else who might enjoy this product?” is a simple, yet powerful way to ask for referrals. Even more powerful would be to offer the chatter a special link, coupon or discount code that they can share with friends.

25. **Keep it simple.** Sure, chat is a time saver, but even so, customers don’t want complex solutions. Give them the most direct and easiest way to handle their issue. They will be grateful for your quick, efficient service. One in five website visitors pick chat as their preferred communication method, and when asked why it is their favorite way to interact with online businesses, the number one answer is, “It’s the most efficient way to get my question answered.”

26. **Learn the keypad shortcuts for chat functions you perform often.** Learning shortcuts can be a time saver not only for you but for your customers as well. Asking for additional training on keyboard efficiency will also delight your supervisor – it means you can be more efficient at serving customers, which will make you and your supervisor look brilliant.

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**II. Tips to Keep Agents at the Top of Their Game**

#LiveChatBestPractices: Ask for referrals to boost sales – word of mouth goes a long way.
27. Before opening company or product web pages on customers’ browsers, ask their permission. If you are guiding their web experience, it is only polite to ask to change their screen view. Computers are personal items, so you’ll want your customer’s blessing before stepping into that space.

28. Proof communications before hitting “send.” Read your communications before they go out to avoid embarrassing typos. You never know what you might find when you take a moment to reread your chat messages before you hit “send.”

29. Use chat tags to categorize conversations as “complaints,” “new sales,” etc. and provide supervisors, sales and marketing with critical data. Not only do you fix problems for customers, but you also need to push information back into the company. By categorizing conversations, company managers have a way to see exactly how customers either like or dislike their products.

30. Have a brief, polite closing message available to send whenever customers decide to end a chat suddenly. There are times when a chat participant goes AWOL. If that is the case, having a prepared message is a huge help. “Thanks for contacting us. I haven’t heard from you for a while so I’ll be closing the chat so that I may assist other customers. Feel free to start another conversation if we can be of more help,” is a friendly and non-confrontational way to end the interaction.
31. Be aware of holidays and refer to them in your greetings, conversations and closings. Holidays are a great way to insert casual conversation into your chats. Showing your human side as an agent will help you to quickly build rapport.

32. When chatting with angry customers, allow them to expend all their frustrations while remaining calm. Then work to solve their problem quickly, without providing excuses. Dealing with an angry customer can be a real challenge. Don’t take it personally. Simply allow them to vent and quickly focus on fixing their problem.

33. Learn how to pace your chats so customers are served quickly but don’t feel like you’re speeding them through the conversation. Keeping your conversations moving forward is the key to helping as many customers as you can. Ask specific questions that allow you to identify the real issues that need to be addressed.

34. Never use one-word responses. If your customer has taken the time to ask a question, do the same with your response by providing an explanation for your answer – whether positive or negative.

35. Don’t criticize your competitors and/or their products or share any rumors about them. “If you can’t say anything nice, don’t say anything at all.” Disparaging your competition makes you and your employer look petty. Take the high road instead. If a customer comments on another company, shift the conversation right back to the work at hand.

#LiveChatBestPractices: Be a lover, not a fighter. Let angry customers vent and then fix their problem.
36. **Give customers the ability to close or decline chat invitations.** Chat invitations are effective, but what if you have an “I’ve got it” kind of customer? Give every potential chatter the ability to decline your chat invitations easily. Customer service agents should be invested in resolution, not how many chats they take. Chat is more than just a way to quickly handle more customers. Quality counts! Carefully choose performance metrics that promote quality interactions, not just speed. Reward those who strike a balance between expediency and quality.

37. **Provide a transcript option for customers.** Were detailed instructions provided by the agent to solve a problem? Did you provide an order reference number? By providing a transcript option, chatters will be able to quickly act on your agent’s advice without the frustration of having to request the information again.

38. **Customize chat for your industry – use invitation messages to ask if they have specific questions on a product or service.** Industry-specific chat questions can up the ante on your level of expertise. Make sure that agents and management are up-to-date on the latest products, services and requirements for your industry so they can answer pertinent questions. The #1 thing chatters say determine a chat session’s success is the “product/service knowledge of the agent.”

39. **Train staff to be able to manage multiple chats simultaneously.** Managing multiple chats requires management staff to make a commitment to providing agents with a higher level of training. Choosing a chat product that allows agents to stack chats across multiple monitors helps a lot.
40. **Add chat features to email signature.** Having chat features attached to the entire team’s email signature makes it easy for current and potential customers to access individualized help whenever they need it, foregoing the need to go to the website and find the link. Ready access to chat is a great way to send the message that your company makes everything easy.

41. **Utilize customer information to know the client better and serve their exact needs more quickly.** Having order history, past chat records, and customer information at the agent’s fingertips just makes sense. This quick access creates quick action and even quicker answers to questions – all things that win customers. Administrators can create a default view for agents which includes the most useful information they will need.

42. **Schedule a regular briefing with marketing department personnel so agents are aware of the latest branding strategies and other marketing initiatives.** Agents are on the front line with customers. Making sure that everyone is in the loop about new offerings in the mix can promote sales right from the chat floor. This type of interaction also lets information flow back from agents to teams in development, management and production.

43. **Make sure whatever company and/or product information you are sharing with customers is accurate and up-to-date.** Inaccurate information can sink a chat – fast. Chatters will believe that your company simply isn’t aligned if agents don’t have the latest information about product releases, developments and policy changes. A company that doesn’t communicate well internally can easily lose customers.

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**#LiveChatBestPractices:** Keep everyone in the loop with regular brand updates for chatters.
44. When your chat volume is low, utilize non-chat periods to monitor other agents’ chats to increase your knowledge and skills or help to improve theirs. Observation and training is one of the key aspects to developing expert chat agents. Working as a group to understand the way chat works and watching live interactions will help create an environment of speed and accuracy – it’s the reason chatters prefer chat.

45. Scripts can be helpful for simple and common customer inquiries. However, agents should be allowed and trained to disregard scripts whenever it is necessary to resolve a specific or unique inquiry. Even the best actors improvise from time to time. Agents should be provided with scripts to be used as a guideline, not as a mandate. No chatter wants to work with an agent that sounds robotic.

46. Enable helpful features, but don’t rely on them. Most chat programs have features such as spell check and grammar check that will help your chats be more polished and professional. Take advantage of the tools available to you, in addition to your own judgment.

#LiveChatBestPractices: No phony baloney. Don’t use a script if it doesn’t fit.
IV. Operation Live Chat: Tips for Supervisors and Admins Only

47. Utilize a load balancer to ensure chats are evenly distributed among agents. Load balancing is an effective strategy to make sure that everyone has a steady, but not overwhelming, stream of chats in the queue. Overwhelmed agents not only make mistakes but can seem impatient or stressed. This can create an ugly impression for your company.

48. Choose the right distribution methodology for your operation. Not all chat operations are the same, so choose the way chats get distributed amongst your team based on what works best for your business or department. A round robin system or least busy algorithm might work best for you.

49. Utilize a supervisor dashboard to monitor the performance of service agents. Having an intuitive supervisor dashboard will give team leaders the opportunity to not only correct but also compliment the work their agents are doing. Dashboard metrics can also provide information that can lead to helpful training and new policies that can positively impact chats.

50. Give agents a chance to vent. Working on the front lines of an organization can require a ton of self-control. Schedule regular times for chat agents to relay their experiences and talk about what their chatters are bringing to them. This can provide valuable organizational insight and provide support for chat agents.

51. Provide adequate training for all customer service agents prior to putting them on live chat. Sending a new agent out into the field without the right amount of training would be like asking a kindergartener to do calculus. Chat agents are trusted with one of the most valuable assets a company has – its reputation. Don’t set agents free to chat until they are equipped with the knowledge, skills and tools they need.
52. **Make sure chat features are visible on every page of your website.** Can you imagine how frustrating it is for potential chatters to have to dig through your site to find a chat link? Don’t make it that hard. Put chat features in a visible area on each page of the website – large enough to be seen, but not so overwhelming that it looks like all you want people to do is chat. In high value areas like sign-up forms and shopping cart pages, you may also want to consider having multiple chat buttons in different locations on the page.

53. **Add company logo to chat window.** Personalizing your chat window with your logo, colors and branding makes you look that much more professional. Customers love an integrated look. If you are planning on building your chat reputation, taking the time to extend your branding to it is worth the investment.

54. **Remind users of important policies while they wait.** Having a prepared script covering your return policies for retail or product-driven operations that loads while chatters wait can be a helpful reminder. This type of communication may even streamline your chat processes as questions may be answered before the chat even begins. It also speaks of your dedication to customer education and ease of use.

55. **Post working hours to the chat page so customers don’t click when no one is working.** It’s fine to show a chat button when you’re not available as long as you clearly state your operating hours. Post your chat availability, including the time zones, so potential chatters know when they can chat with you.

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#LiveChatBestPractices: Chat links on shopping cart pages keeps sales up!
56. **Offer perks for using chat services.** Encourage your customers to take advantage of your chat services by offering free shipping after a chat. This small token of appreciation shows that your organization is committed to working with customers and going the extra mile to make sure they are satisfied.

57. **Allow flexibility in the use of customer service protocols so agents can adapt to each situation and determine the best way to serve individual customers.** Customer service protocols need to be in place to ensure the best chat experience. That said, they shouldn't feel like a straitjacket to the agents who are trying to work with chatters. Showing confidence in your agents’ judgment and expertise may help them to come up with creative solutions that will win you customers.

58. **Provide agents with continuing education on customer service to develop their skills and be more effective and efficient.** Becoming an excellent agent isn't a one-time training process. Putting ongoing training in place will help to ensure that every chatter gets a great level of service from your agents. Training on everything from product development and software updates to how to deal with angry customers can improve the customer service experience – for both the agent and the chatter.

59. **Pair each new agent with an experienced agent so they can support new agents.** The old adage, “two heads are better than one,” is applicable to chat. Putting an experienced agent and a new agent together is a powerful combination. The experience of a seasoned agent with the fresh perspective of a new agent can offer organizations creative feedback and options they hadn’t considered before.
60. Develop a live chat system that allows agents to transfer a chat to a more experienced agent or supervisor to answer customer questions that the original agent may not be able to answer. Transferring a chat when the initial agent simply can’t formulate a solution shows that your business has a deep bench. Creating processes for dealing with specialized topics or issues shows chatters that you are serious about taking care of your clients.

61. Provide each agent with two monitors: one dedicated to the chat screen and another for inventory systems, CRM, etc… Since a chat agent’s office is literally their monitor, giving them a little extra space is a good idea. Allowing chat agents to have multiple monitors will help them remain more visually organized, increasing their efficiency and effectiveness. This will also prevent them from losing chats or having so many pages open at one time that it compromises speed.

62. The location of your chat button is key. Sure, you can put your chat button wherever you like on your website, but survey respondents ranked the upper right hand corner of webpages as their #1 preference. Don’t try to be so creative with your placement that you end up losing customers.

63. Integrate chat with email to allow agents to see a customer’s chat history when emailing the customer. Giving agents the flexibility to see a customer’s chat history while utilizing email is another powerful tool in the toolbox for chat agents. This is especially true for agents who are managing more than one chat at a time. The visual reminder of the current chat will save the agent time and frustration in writing a follow-up email.

64. Integrate chat with remote support technology to allow agents to seamlessly transition from a chat to a support session. When larger issues with a customer arise, giving agents the flexibility to immediately transition to a support mode represents simply the best in responsiveness. Imagine the surprise from the chatter when they realize your agents can actually fix the issue they need help with? You will earn a customer for life.

#LiveChatBestPractices: Put the chat button in the upper right corner, right where chatters expect to find it.
65. **Integrate chat with CRM databases to allow data, including complete chat transcripts, to appear in your CRM database.** Metrics are an ever-evolving way to improve products, customer service and monitor profitability. With chat becoming more and more popular among users, integrating this service into your CRM profiles will give your marketing and development teams more ammunition when creating services that target your customers’ needs.

66. **Make an email form available to customers to capture lead information when agents are not available to chat.** For those global customers who may try to contact you when your chat services are not staffed, offer an immediate link to an email-based form that will let them know you want to talk. A short, professional note such as, “We’re so sorry we missed your chat. Send us a message and we’ll get back to you as soon as possible,” will let them know you do want to help.

67. **To keep information secure, chats should be encrypted.** Needless to say, with the amount of personal information floating around, no one wants to have their identity compromised. Even worse is when your company’s lack of security has caused the breach. To save your organization and your chatters from information theft, every chat should be encrypted with the latest technology and regularly upgraded. Even better, communicate this to the chatter to give them peace of mind.

#LiveChatBestPractices: Help people turn on chat by giving them a floating chat button.
We started this eBook in the hopes that we could produce maybe thirty or forty time-tested tips to make a tangible impact on your live chat implementation. We were amazed that we were able to generate nearly seventy suggestions that had the ability to pass muster.

Live chat works. It absolutely drives sales. It absolutely lowers costs. It absolutely improves customer satisfaction. At any given time on websites around the world, one in five visitors would pick chat as their preferred way to communicate with an online business. Why does chat suffer from such low penetration then? The answer is because live chat takes cross-departmental planning, operational coordination and a new way of thinking, incentivizing and hiring. Live chat, in many ways, is simple and, in other ways, complex. We hope that the tips included in this three-part eBook have steeled your dedication to the technology and the positive results it can drive for your business.
Whether your company has a high demand for live chat or is just getting started, the BoldChat team can help you get the most from live chat through planning, training, customization and optimization.

Contact us today to learn how BoldChat can improve your live chat operations and customer experience!

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