Live Chat Playbook

Setting your Live Chat Operations on Autopilot

SalesIQ

If you are familiar with online advertising and are involved in your company's marketing team, you probably already know that 98% of website visitors won't sign up for your product or service right away. How can this substantial amount of bounced traffic be retained? How can more shopping carts be saved?

Using live chat, most customer issues are resolved in 42 seconds. 63% of customers reported that they are more likely to return to a site that offers live chat. If this comes as news to you, you'd be surprised to learn just how much live chat can build transparency and trust among customers.

1 Starting a chat with customers

When someone visits your site, it's because they need some information about your website or your products. Put your best foot forward and make that first impression count. Identify your customer's navigation pattern, based on their location, and send targeted messages that encourage them to chat. Companies that nail their special crafted greeting get up to 10X more chats.

Mentioning your customer's name lends a personal touch.

Hello *customer's name*, How may I help you?

If the customer hasn't provided their name, you can ask for it.

Hello, may I have your name, please?

Suggestions:

- Use a well- framed greeting.

- Have the "time on website" trigger equal to or greater than that of the sign-up time. If there is a login option, start the conversation with a "Welcome back!" to greet returning visitors.

2 Engaging customers in live chat

Once a customer becomes a recurring customer, it is natural to assume that they will return no matter what. How can live chat help you sustain and nurture this relationship you've built?

Hi there, Betty! How can I help you today?

Hi Lamar, I wanted to know if there is a free upgrade available for my account.

I'm sorry, Betty, under your current subscription, you're not eligible for a free upgrade. However, you could renew your subscription for a nominal fee to get the free upgrade and other benefits.

That would be great!

Would you like more details regarding the additional benefits? I'll be glad to assist.

Yes, thank you.

Suggestions:

- Personalize your chat messages so that your customers know you're not a bot!

- Pick the right time to engage with your customers. For instance, you could initiate a chat with the customer after he/she spends more than a minute on your product page.
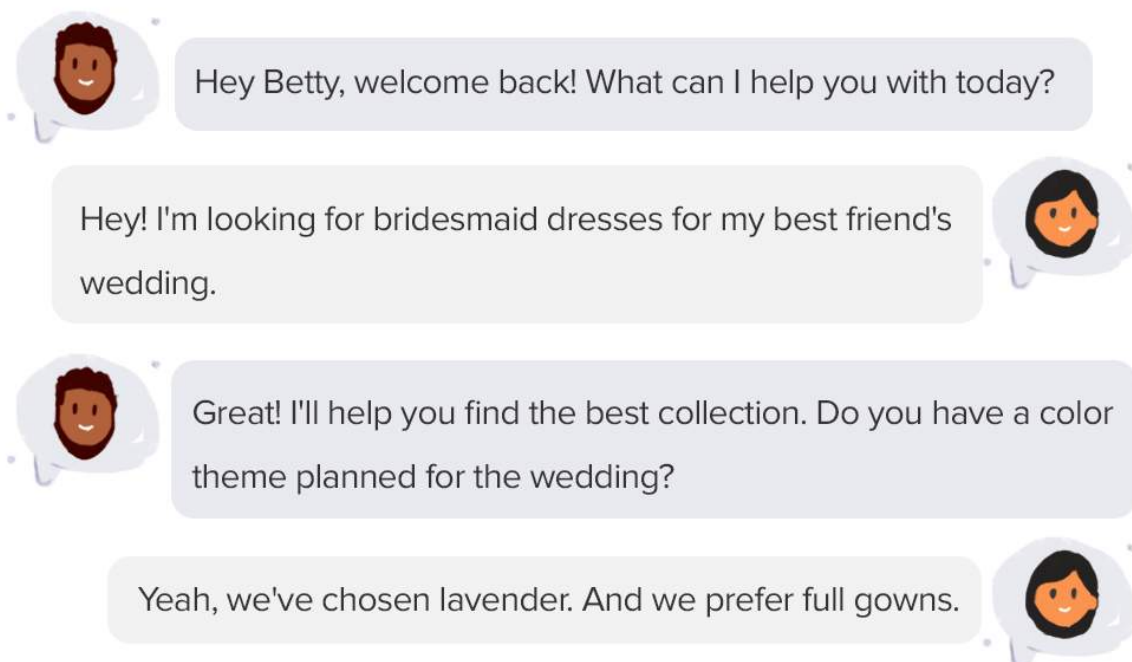
3 Approaching an existing customer

The probability of selling to a new prospect is 5-20%. When selling to an existing customer, the probability jumps to 60-70%. To craft a conversation with returning customers, check previous conversations you've had with them, i.e, the chat history.
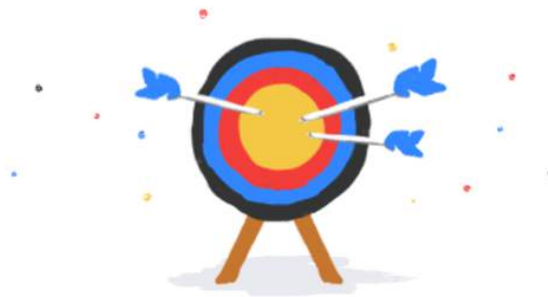
Creating targeted, conversation-starting chats can be an incredible way to boost the conversion rate of your page.

Hey Betty, welcome back! What can I help you with today?

Hey! I'm looking for bridesmaid dresses for my best friend's wedding.

Great! I'll help you find the best collection. Do you have a color theme planned for the wedding?

Yeah, we've chosen lavender. And we prefer full gowns.

That's perfect! We have a slash neck solid lace gown in stock. Please follow the link[...] I'll just forward a few more options to your email address. P.S: We also make customized wedding dresses.

Oh, that's amazing! I'll get back to you.

Sure, have a great day :)

Suggestions:

- Since you have the previous purchase history of the customer, you can figure out their patterns and send more relevant suggested items.

- You can have an informal conversation with an existing customer if they're responsive to it.

4 Chatting when the customer is describing a problem

Once the customer has stated their issue, listen carefully and ask

questions that will help analyze the problem. Don't overdo it by providing information that may be too technical for the customer to grasp.

Hey! I'm not able to create new triggers on my site. Can you help with this?

Hello Betty, let me check if I have got this right......Correct?

If you're not able to understand the issue with the information the customer gives you, ask for more details.

Can you please elaborate more on the email trigger issue you are facing?

Suggestions:

- Be genuine and helpful while addressing customer pain points. Reply to the chat within 15 seconds.

- To avoid confusion, make sure you understand the customer's issue before giving instructions or offering solutions.

5 Being persuasive in chat

Be persuasive, not pushy.

Hi, I am unable to find the customization option in my settings. Could you help?

Hi Betty, you are currently using the free trial version, which has limited customization options. I would be glad to help if you want to upgrade to the premium package. This package comes with a host of customization options focused on boosting conversion rates.

No, I'd like to continue with my free package for now. Is there any way I could include my brand logo?

I am sorry, this option is not yet available for the free pack. According to the information, I have with me, your free package will expire in 2 weeks. Would you like my assistance in upgrading to the premium package then or would you like to upgrade straightaway?

Right, in that case, I'll upgrade to the premium package in 2 weeks.

Yes, of course. Our team will remind you when your free package expires. If you have any further questions, I'll be glad to help.

Thank you, Lamar.

Suggestions:

- Think about how you would like to be offered assistance when you are facing a setback or don't have enough information. Ask your customer for more information while keeping this in mind.

- Take the time to explain and clarify.

6 Being proactive in chat

A recent analysis of interactive chat suggests that investing in reactive chat can produce a 15% return on investment, while investment in proactive chat will produce up to 105% ROI.

Hi there! I see you're interested in subscribing to our exclusive package. If you subscribe today, you could get up to a 30% discount. Would you like to learn how?

Yes, please.

Here's a promotional code you can use at checkout: 26P10Z.

Thank you, Lamar. I'll definitely be taking advantage of the offer.

Glad to be of assistance!

Suggestions:

- The trick lies in providing a "human touch"—make sure you display a photo of yourself when you initiate or respond to chats.

- Remember, it can't hurt to call your clients by name.

7 Avoid wait time during chat

60% of customers say they hate waiting longer than a minute for a live chat agent to respond. This includes the wait time spent during call transfer or when visitors are put on hold. Remember the annoying music that plays while you're on hold?

Before transferring the call, inform them why and to whom their call is being transferred.

> Betty, I'm going to connect you with Ryan from the sales department. He'll be able to help you with this problem.

Provide the chat agent with the customer's name and explain the nature of their problem. Ask the customer's permission to put them on hold.

> Would you mind holding on for few minutes while I check this with our support team?

Yeah, sure.

Thank you for waiting. I have the details regarding the product. Let me send it over to you.

8 Handling complaints

Sooner or later, customer support will throw you a curveball. You may have to handle a problem you've never seen before. It's your responsibility to juggle between solving your customer's problem and gaining their satisfaction.

"When customers share their story, they're not just sharing pain points. They're actually teaching you how to make your product, service, and business better." - Kristen Smaby

I haven't received my purchase yet and the payment went through a week ago. What's taking so long?

I'm sorry you didn't receive your purchase on time. Let me find out what I can do to make it up to you.

Suggestions:

- Acknowledge the customer's feelings by first listening to their complaint. Sometimes it's the small issues with slow response time that are difficult to handle.

- Two reasons why you lose customers is that they a) feel poorly treated or b) believe you failed to solve the problem in a timely manner.

9 Handling angry customers

What if you come across a customer service situation that demands your immediate attention, but no script or template has prepared you for this moment? Every live chat agent encounters an angry customer at some point.

I am unable to access my account. This isn't even my first registered complaint. I am beginning to have second thoughts about my subscription with you. Service is terrible!!

I am sorry there was a delay in getting back to you. I understand why you would be irritated. Let me look into your query right away.

Suggestions:

- Customer service expert Robert Bacal provides the CARP acronym to deal with angry customers.

    C - Control your anger and don't respond in the same manner as your client

    A - Acknowledge the gravity of the situation and empathise

    R - Refocus your attention to the situation at hand

    P - Problem-solve by employing the most efficient strategy

10 Engaging visitors with information to increase lead scores

Lead qualification is the first step in generating a visitor's score. A pre-chat form is used to collect visitor information prior to the chat, which you can assign specific teams to assist with.

Set rules and allocate points for definite conditions, for example:

- Add 20 points if the visitor's last visit duration is more than 2 minutes

- Add 10 points if the visitor's last visit duration is less than 2 minutes and more than 1 minute

Suggestions:

- Once the visitors follow your customer's path to purchase, you can begin assigning numerical value to the leads, helping you make more informed marketing and sales decisions.

11 Replying when you've made a mistake

Even when the necessary training and script is given to the chat agent, mistakes may still occur. Be clear and direct about the fact that you've made a mistake. Apologise for personal mistakes, but also for mistakes made by someone else. You are representing your company, not yourself as an individual.
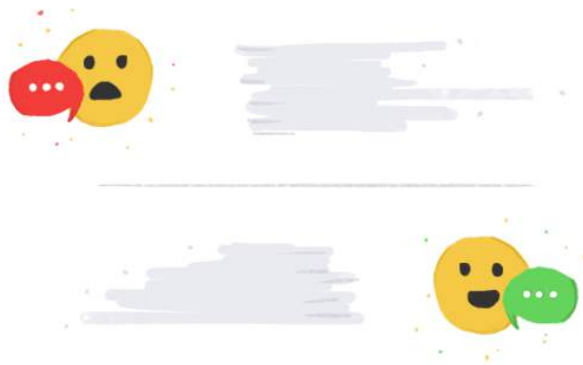
Betty, I'm sorry we sent the invoice to the wrong address. We are going to resend it now to the correct address. I'm sorry for the inconvenience. We're adding 10 more days to your subscription to make up for our error.

12 Reducing churn rate using live chat

A company's churn rate is measured by the percentage of customers who have cancelled their subscription to a product or service within a given timeframe. Eighty-five percent of customer churn is due to poor service. There are many ways you can use your live chat service to retain customers. Ideally, this should be practised well ahead of time, so that the customer does not, in any scenario, feel the urge to switch over to another product or service provider.

Hi there, Betty! We haven't heard from you in a while. Would you be interested in trying our 14-day free trial pack?

Suggestions:

- Timing is everything. Connect with your customers when you know they can use some additional guidance in picking the right product or payment option.

- You can offer post-chat surveys to assess your performance and bridge gaps.

13 Approaching customers who have shown interest in your product

Visitors who show interest in your product are your potential customers. To convert them into customers, you need to nurture them through making their purchase decision.

> Want to know how many prospects visit your website? Our live chat visitor tracking software will help you find potential customers and close deals faster.

Attach "Yes, I'm interested!" and "No, thanks" CTA buttons for visitors to respond to the message.

> What's stopping you from the purchase? Swipe, sign, and buy any mobile device/appliance on EMI in our store.

Suggestions:

- Customers can show interest in your site by liking your page on social media, subscribing to your newsletter, etc Use this spark to convert them into paying customers.

- Tell the customer what's in it for them. They already have access to information about the product. Create interest in them to improve customer retention.

14 Turning customers into brand advocates

Now that you've provided your customers with quality service and they've given their approval, it's crucial that they help spread the word. Turning your satisfied customer into a genuine brand advocate can be a huge boost to your conversions. This is a marketing strategy with low investment and high potential returns.

> If you enjoyed our customer service, we would love it if you'd share your experience with friends. For each sign-up from your friends, we will knock off $5 from your premium package fees.

> Sure, I'll spread the word!

Suggestions:

- It's important to identify the right candidates for brand advocacy. Pick customers who are genuinely happy with your service and have a wide network of friends who are likely to be interested.

15 Creating automatic triggers with relevant content

Most companies use live chat with handy features like triggers and shortcuts. Use this technology appropriately and sparingly. Live chat platforms are essentially used to provide a personal connection between

you and your customer. Before setting automated triggers, think about how it will enhance your conversation.

Step 1: Select the phase where the trigger message should appear

      a. when a customer lands on your site

      b. when a customer accesses a particular page on your website

      c. when the visitor performs a specified action or

      d. when a visitor leaves your website

Step 2: Set the pre-determined conditions

Step 3: Set the point when the chat window should open

Hi there, may I introduce you to our latest range of business analytics tools?

or:

Hi, I see you're interested in our risk management software. Would you like to learn more about it?

Suggestions:

- Instead of messaging everyone individually, set triggers to engage the right customers.

- Customize your live chat triggers with preconfigured conditions, such as time spent in the checkout section or whether the visitor is a returning customer.

- Set triggers for pages where the conversion rate is less than 2%.

- Strategically place the live chat button.

16 Using live chat tools

Typing Indicator: It's always great to have a head start when you need to know what your customers are thinking. By framing responses even before they finish typing, you can save time and handle multiple chats.
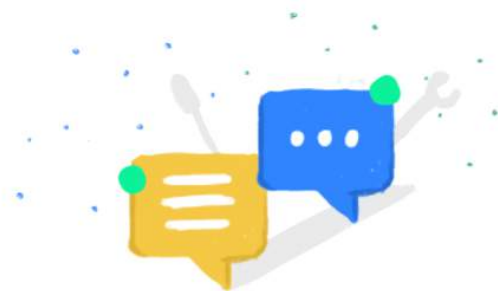
Hi, I want to know if the premium package will be on sale soon.

Yes, you can get the package at a 20% discount between May 19-26.

Suggestions:

- Make sure you have activated the alert button to notify you when the customer finishes typing and hits send.

17 Chatting when you're not sure how to answer a customer's question

52% of consumers will abandon online purchase if they can't find quick answers—so the key is to reply instantly and accurately.

But what if you're not sure about the solution you're giving? Promote cross - department cooperation—chat agents should know about the product lines in your organization. This will help them to perform both as a salesperson and support personnel.

Can you give me more information about the lead scoring feature?

I'm sorry, I don't have information on that. Let me clarify with the marketing department and get back to you shortly.

Suggestions:

- If you are unsure about the solution, it is best not to wing it. Customers need definite solutions and they'll get irritated if the issue recurs. Try to solve the problem once and for all.

18 Avoiding negative statements

Customers start chatting to look for expert advice or for more detailed information. Being too straightforward and replying "I don't know" just won't do. Understand that customers are not fully aware of the product, and as a chat agent, it is you who have in-depth knowledge about the product/service.

> I understand automated triggers, but how do I set the ideal time for more reach?

> That's a good question. Let me connect you with our support engineer, Paul.

> Hi Betty, let me take you through the steps to optimize your triggers effectively..

Suggestions:

- It takes 12 positive experiences to make up for one unresolved negative experience. Instead of saying "This product is not available until next month.", you could say, "The product will be available next month. I can place the order for you right now and notify you once it reaches our warehouse."

- Apologize when you don't have the answer, but assure them that you'll get back with the right information, or connect them with someone who can resolve the issue.

19 Using visitor behavior analysis

Understanding your customer's buying patterns and needs is essential to reducing bounce rates. Some business applications show the customer's response even as they're typing, so the live chat agent can preempt their requirements.

Hi there, I see that you've added our exclusive package to your shopping cart, but haven't purchased it yet. Do you need more details regarding the pricing and payment options?

Hi, I want to renew my subscription for this year. Wanted to know the availability of other similar packs before doing so.

You can follow this link [..] to see all available packs. I'll be glad to assist you in your decision.

Yes, I would like to know if there will be a discount on the price.

Suggestions:

- One of the ways visitor behavior can be analyzed is visitor segmentation, which focuses on differentiating your visitors by factors like where they come from, how long they spend on the site, whether they are returning visitors, etc.

- You can draw up a graph of your visitors' journey through your site.

20 Giving honest responses

A Kissmetrics report suggests that friendly customer service agents contribute significantly to brand loyalty. Not to mention that an honest response is sure to guarantee your client's respect!

Hi, I'm not able to open my account. Once I enter my username and password, I get a message that says, "Account inaccessible." This problem has persisted for two days now.

I am not sure how to rectify this error, but I'll find out from the technical team as soon as possible.

Other honest responses such as the following can also be effective:

That's a good question, Betty. Ella from the technical team will have more information on this. Shall I connect you to her?

21 Approaching missed visitors

Do you miss someone's question due to high visitor volume? What if visitors send a message to your live chat customer support and neither you nor your chat agents attend to them? You could potentially lose customers if this continues, unchecked.

I would like to know my shipment details... Time: 14:35

I'm sorry we missed your chat. Time: 18:23

Your shipment code is: **087EDG4926**

You can track your shipment using this code.The average time taken to deliver the product is 3-4 working days.

Suggestions:

- Send reply email directly to the missed visitor, even if their request has been closed by some other chat agent.

- Apologize for your late reply and provide them with the information they were looking for.

22 Supporting customers who speak a different language than you

When reaching out to a global audience, cross-cultural interactions are inevitable. After the proper research and analysis, you could choose the foreign languages that you would like to provide support in. Hiring support staff who are proficient in the language is the next step.

Rohan, a non-native English speaker could attend to his chats with foreign clients as Ryan. Real-time chat translation options such as those provided by Zoho SalesIQ will also come in handy.

Hi, how can I help you?

Bonjour, comment puis-je aider?
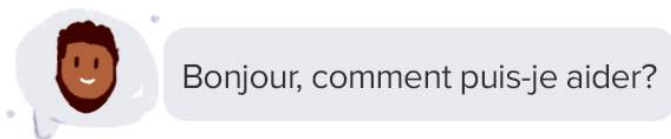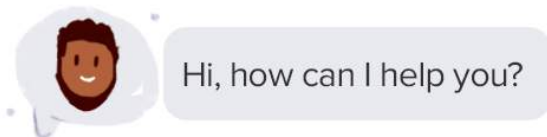
Suggestions:

- Consider possible cultural gaps and bridge them well ahead of time. This could include having your live chat agents use nicknames that your clients are familiar with.

23 Boosting up-selling and cross-selling

U p-selling is a popular sales technique all sales agents are familiar with. Most customers, too, are aware of the optional upgrades to their purchases. Take your most recent visit to any fast food joint. Do you recall being asked, "Do you want extra toppings with that?" Cross-selling works on a similar principle. It involves selling your customer a product that is related to, or may be used in combination with, the product they are interested in.

Now that you've decided on our exclusive package, would you like to upgrade your purchase by including customization options?

Can you give me more details?

With these customization options, you can deliver on your brand value. They are available at a 20% discount when you buy them in combination with the exclusive package. I'll be glad to set you up with a free demo of the customization services.

Suggestions:

- Personalize your message and keep track of the pricing.

- Up-selling and cross-selling have better rates of success when you include a small bonus for your customer.

24 Setting up canned messages/responses

Canned responses are like saved chat shorthand. Instead of typing the same answer for the nth time, they save keystrokes and shorten your response time. Use preconfigured responses to answer standard questions.

Hey Lamar, Can you tell me about your return policy?

#returnpolicy (canned shortcut) If you don't like the color, fit, or design, simply return/exchange your purchase within 15 days of delivery. Log in to your account to use our easy online return process.

Suggestions:

- You can also assign canned responses to groups.

25 Identifying the navigation pattern of the customer to send targeted messages

Google Analytics is a free, versatile tool you can use to analyze the activities on your site and improve SEO. One of its features generates a visitor navigation report. With this data, you can send targeted messages to the customer and close deals faster. Follow a data-driven approach for pages that are converting well.

- Create a list of the main pages in your site that prospective customers interact with.

- Analyze the conversion rate for the selected pages and segregate the time into business hours and after hours.

- Analyze your site visitors and segregate them based on domain area, behavior on site and so on.

Not sure which plan is most compatible with your site ?
Let me help you. Here are the bestsellers...

or:

Having difficulty making the purchase decision?
Let me assist you.

Suggestions:

- Your website navigation should be logical and intuitive. For large websites, try using a sitemap.

- You can track the success rate of personal chats and also find the sources that are generating traffic to your site.

26 Using live chat content to retarget the product to customers

Retargeting or remarketing is powered by a cookie-based technology that allows you to track your website visitor even after they leave your site. Take, for instance, a visitor who spends time on your website, but doesn't sign up for your product or service. Through retargeting, a simple code or pixel will follow them across the sites they navigate. As the page loads, you can bid for your advertisement to be placed. In nanoseconds, your ad will be viewed by your audience, once again reminding them of your brand presence and value.

Hi, we just noticed that you have been eyeing our premium package for quite some time now. Would you like assistance in making the right pick from our range of options?

Thank you, I would like to know if there is a free trial I could use before I make my choice.

You can use our free trial package for 30 days. I can email you the details right away.

Thank you, Lamar!

Suggestions:

- Make your remarketing efforts part of a larger marketing strategy. You can combine customer retargeting with the spontaneous customer support that a live chat feature offers.

27 Using chat bots effectively

Chat bots are programs that use artificial intelligence to mimic human conversation. It's easier to create chat bots than to train chat agents, but the challenge is how to make them sound convincingly human. Fifty-one percent of people say that a business' support needs to be available 24/7.

Instead, connect with customers using a simple pre-chat form and send canned responses, which are prepared earlier for these situations.

Suggestions:

- The key is to sound more human and not to reveal that it's a chat bot.

- Use chat bots only when chat agents are not available.

28 Assisting customers in their purchase decisions

Usually customer inquiries are one of two types: Either the customer is

looking for more details, or they're in a dilemma about a purchase decision. It's more important to create customer satisfaction by presenting choices, than it is to close the deal right away.
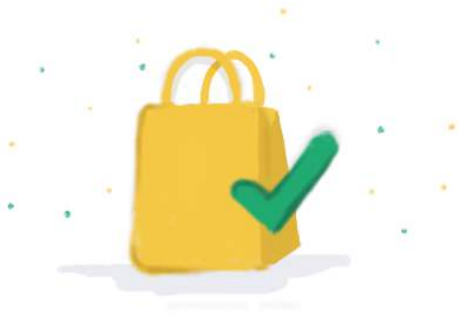
Hello Betty, How may I help you?

I am looking for a smartphone.

Great! Can you give me more details about the features you're looking for?

Mostly I'm looking for a dual sim, connectivity features, and a 12 megapixel camera.

Let me send you some models that meet your specifications...

I think I'll go with the Galaxy Note 7.

You can also consider Samsung Edge 7. It has more additional features.

Yeah, will consider it. Thanks.

Suggestions:

- The chat agent should have the ability to provide the necessary information to the customer. For instance, if the customer is interested in product A, but product B is more suitable, you can always suggest it as an alternative.

29 Optimizing chat conversions

A/B Testing Live Chat: As discussed, live chat holds the potential to impact your ROI greatly. It is crucial, therefore, that you test your live chat service from time to time and update your services as required.

Lamar wanted to check the test results for two different variations of a single live chat feature. In version A, he added a call-to-action button, while version B didn't have one. After testing the two versions on a sample of 500 visitors each, he could observe a conversion rate of 12% in version A and a conversion rate of 3% in version B. To test the results, he used a set of metrics that included the visitor ratings and bounce rates.
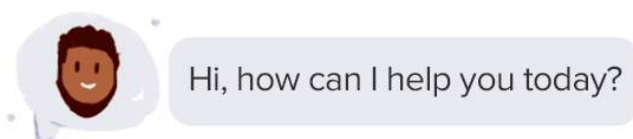
Version A:

 Hi, how can I help you today?
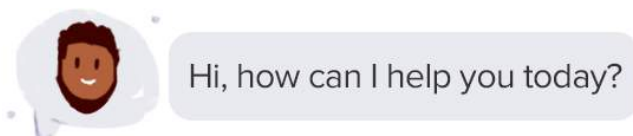
CTA button: Are you doing your SMO right? Click here to find out

Click Here

Version B:

 Hi, how can I help you today?

Suggestions:

- Consider the key areas you would like tested. For instance, what are the common complaints your live chat service has faced? What are your customer expectations, and are they being fulfilled?

- Remember to test a single chat variation at a time so that your test results have ample clarity.

30 Offering a post-chat survey

The post-chat survey can help you evaluate your service and fine-tune whatever needs improvement. So, the next time you interact with customers, you'll know you're providing services that meet their requirements to the dot.

Now that we have gone over possible solutions to your inquiry, would you mind filling out this short review of our services? It will only take 5 minutes of your time.

Suggestions:

- Make the questions as brief and succinct as possible.

- Provide space for feedback/suggestions at the bottom of the review.

31 Following up with customer issues

Following up is essential in all stages of the customer cycle, from target audience to prospects to after-sales. It's a great way to build trust, and this trust will lead to customer loyalty.

Hello Betty, I just wanted to let you know that we're still investigating the problem. I will email you as soon as the issue has been sorted out.

Suggestions:

- If you promised the customer that you'll get back with some information, it's best to do that within 24 hours.

32 Sending chat transcripts to the customer

Chat transcripts provide valuable information both for customers and chat agents. They include visitor ratings and other related information. Providing customers with chat transcripts shows your dedication to doing a thorough job while giving customers quick access to past solutions.

It was wonderful speaking with you today, Betty. Would you like to receive a transcript of our chat for future reference?

Yes, thank you.

Suggestions:

- Before sending over a transcript, ask your customer if they want access to it.

- Provide export options so the customer can view the chat at any time, whether they're online or not.
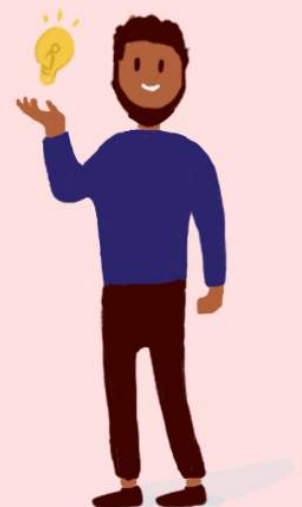
33 Rewarding loyal customers

How do you ensure that your client becomes a returning customer? Customer loyalty goes a long way toward bringing them back and bringing in more business. Having a loyalty program or reward system for frequent customers can be a big value-add.

Hi there, Betty. You have been with us for well over a year now. And we couldn't be happier to tell you that you can now unlock your Silver account with us. It includes a range of free benefits for you to choose from.

Thank you, Lamar!

Suggestions:

- Offer frequent customers benefits like free merchandise, gift coupons, and discounts. These act as added incentives that can prevent shopping cart abandonment.

34 Wrapping up the chat

Ending the conversation is also a mark of the service you provide. Before ending the conversation, ask if you can be of any further assistance. If any further action is to be taken, clarify what was agreed upon.
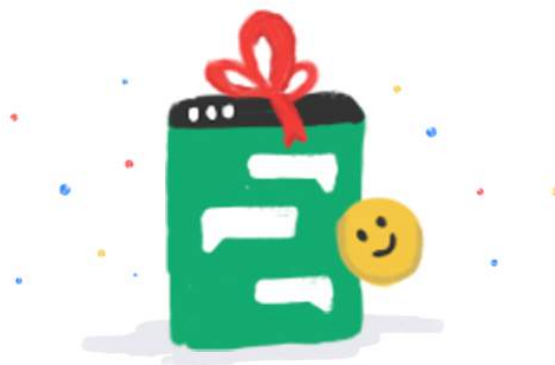
Your payment receipt has been sent to your email address.

Okay!

Is there anything else I might help you with today?

No, that'll be it.

Sure! As we agreed, I'll post a note to our support department regarding the ticket and we'll follow up with you on that by tomorrow. Goodbye!

Suggestions:

- Thank the customer for engaging with you on live chat, and invite them to chat again. Avoid abrupt goodbyes. End the conversation with a definite "goodbye" or any other expression that leaves no doubt that the conversation is ended.

- Who should hang up first? Preferably, let the customer hang up first.

Conclusion

Quality customer service is fundamental to the long-term success of any business. Live Chat provides instant support and information to any customer who faces challenges in online shopping. According to Forbes, 92% of customers feel satisfied when using the live chat feature compared to other communication channels. The key differentiators in favour of Live Chat include providing convenience to the customers, increasing sales, boosting customer loyalty with instant replies, addressing customer pain points and giving you the edge over competitors.
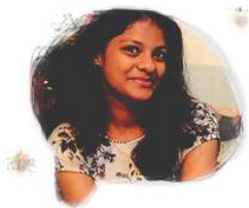
We hope that the tips included in this e-book provide positive results in your business. Happy selling!

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