LIVE CHAT HANDBOOK

A Practical Guide to Drive Engagement
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Chat Humanizes
The Digital Experience

Live online chat is proving to be a successful way to fulfill consumers’ desire to connect with companies. Customers expect chat to be consistently easy and effective at answering their questions and resolving their issues.

It may seem hard to provide a consistent experience because each chat engagement poses a unique question on a unique subject from a unique customer. But by focusing on how best to engage with customers via chat, this channel can become one of your most powerful sales tools.

“Chat is going to have a 3% higher conversion than phone, but 28% better [conversion] than those who don’t engage at all.”
- Manager of business processes, insurance company
Drive Conversions and Loyalty

Taking the time to get your chat offering absolutely right can really pay off. Chat can significantly boost sales and build repeat customers.

- **38%** of online consumers said they had made their purchase due to a chat session.*
- **20%** increase in shopping cart size with chat engagements.*
- **63%** of online consumers said they were more likely to return to a website that offers live chat.*
- **92%** of consumers are satisfied or very satisfied with their experience when they chatted on a mobile device.**

*Forrester Research, Inc.
**Moxie
Four Types of Chat Engagements

There are 4 different types of chat engagement:

**Hyperlink** – A simple text link embedded on a web page that customers use to initiate a chat session.

**Button** – A visual cue embedded at a strategic location on the page to start a chat session.

**Proactive** – A dynamic popup that is selectively initiated by the company and invites the customer to chat.

**Responsive Button Overlay** – Often designed as a sticky “file” tab or persistent button that is visible at all times, no matter where the visitor is on the page. The customer clicks the tab or button to initiate a chat.
The When, Where and Why of Chat Hyperlinks

Chat hyperlinks are short, simple statements embedded on web pages that a visitor can click to initiate a chat. It’s important to make sure that the hyperlink:

• Is in a location that is easy to find.
• Clearly describes the action the customer needs to take, such as “Chat with us now. Click Here.”

Chat hyperlinks can be a good choice on customer care and Contact Us pages. However, if chat is a key part of your online sales strategy, chat buttons or proactive chat would be better choices as they are more visible. Hyperlinks can be a good supplemental way to enable visitors to start a chat, but don’t rely on them as your primary mechanism to get visitors to connect with you.
Boost Chat Use with Buttons

Chat buttons help visitors more easily identify how to chat. They let you add an image and a style that reflects your brand. When using a button:

- Make it easy to find and keep the location consistent, such as always in the right top corner of a page. Don’t make visitors have to scroll the page to find the button.
- Use colors that draw the visitor’s eye. Choose something that ties into your website, but stands out from the colors behind it.
- Use an icon and wording that make clear how the visitor uses the button to start a chat.
- Never use an icon of an agent with a headset for your chat button as this will confuse visitors.
Reach Out to Customers with Proactive Chat

A great way to engage visitors is with proactive chat. Moxie has found that proactive chat achieves a high 10-15% acceptance rate. It engages visitors based on their behavior, placing a pop up in front of them to let them know that you are there to help.

When using proactive chat:

• Do it for good business reasons. Do you want to increase sales of certain products? Are customers consistently getting stuck on a page of an application form? Are you trying to boost the dollar value of a cart?

• Make sure the look and feel of the invitation coincides with your brand and the customer base you serve. Do not overdo the branding - keep it simple and clean.

• Keep invitations friendly, but assertive and provide a call to action that makes it clear what the visitor must do to start the chat.
Keep it Relevant

Evaluate timing and context to make sure that any proactive invitation is relevant to what the visitor is doing.

- Engage when the time is right. Analyze the amount of time visitors spend on certain pages to identify when an invitation might be timely. For example, if visitors spend an average of 3 minutes on a high-value product page, extend the invitation at the 2-minute mark. Don’t do it the instant they land on the page.

- Get the context right. Let’s say you want to use proactive chat to promote opening a savings account. Don’t annoy customers who already have savings accounts with this invitation as it is irrelevant to them. Based on information about logged-in customers, a rule can launch the invitation only to those who have a checking account but not a savings account.

![Diagram]

**HAS SAVINGS ACCOUNT?**

- **Extends invitation**
- **Do not extend invitation**
Increase Chat Visibility with Responsive Chat

As businesses look for more ways to increase chat’s presence without always using a proactive invitation, responsive chat has evolved to provide this capability. Responsive chat uses a “file tab” that is always visible no matter where a visitor is on a particular page.

When a visitor clicks on the tab, it is best if the chat window opens within the web page’s frame rather than in a separate window. This provides continuity, as the visitor does not have to toggle between a chat window and the web page during the engagement.

Keep the look and feel of the responsive chat tab and window simple and minimize branding. Because the tab is a part of your web page, making it visually busy or using it to push your brand will distract the visitor from your website.
Best Practices for a Great Chat Experience

Businesses invest an enormous amount of time making sure their ecommerce operations reflect their brand and consumers’ expectations of the brand. Because chat is now a key part of this experience, the same attention needs to be paid to how chats take place.
Evolve Your Chat Thinking

Typically, chat has been used selectively and only with high-value customers. But chat has proven to be an effective sales booster across all customers and a good way to reduce service costs by deflecting expensive phone calls.

Wide customer adoption and the potential value to your organization require new thinking about chat. Today, it is far better to make chat available to all customers at all times.

You also do not need to limit yourself to just one of the chat techniques. For example, you can combine use of a responsive tab, proactive chat and text link for multiple opportunities to engage with and influence your customers.
Tailor the Chat Experience to the Consumer

No matter which types of chat you choose to implement, there’s no one-size-fits-all solution for the customer’s experience during chat. Consumer expectations vary based on the business, and the chat experience should match these expectations. A breezy, casual chat style may be fine for a cutting-edge clothing site, but it is unlikely customers want a bank representative to be just as casual when chatting about a mortgage or health savings account.
Follow the Three E’s For Chat Agents

Ultimately, the success of your chat experience will come down to the skill of your chat agents. Keep in mind the Three E’s for developing your chat talent pool:

1. **Educate** your agents on the company’s intentions and goals for the chat channel. Teach them about the website and the products. School them in chat etiquette so that visitors sense a friendly, smiling agent helping them.

2. **Empower** your agents by building as much content as needed to make their jobs easier. Make it quick and easy to find the right information.

3. **Encourage** your agents to tell you what they need to delight your customers, help them get what they need and get out of their way.

*For more information about how to best recruit and train chat agents, please read “The Do’s and Don’ts of Web Chat” available at: http://resources.gomoxie.com/WebChat_eBook.html*
Measure Your Chat Success

Obviously, one of the key ways to measure the success of your chat engagements is by comparing order size or dollar value of purchases when chat is used versus no chat. But to measure how well you are meeting customer expectations of the chat experience, use a survey that follows these best practices:

- Deliver the survey immediately after a chat session has ended. The experience will still be fresh, and customers are more likely to consider it as part of the chat engagement.
- Make sure the survey appears within the chat window. Don’t force customers to go to another web page.
- Keep it short with no more than 5 questions and never make customers scroll to complete the survey.
- Include a free-form field for comments. These can deliver highly valuable information about the customer experience.
Crate and Barrel wanted to build a competitive advantage and offer customers their channel of choice to improve customer experience, engagement, and acquisition across mobile, tablet, and desktop shoppers. It was critical the solution be easy to use and administer for the company’s business users.

135% INCREASE IN AOV WHEN CUSTOMERS ENGAGE ONLINE

30% INCREASE IN CUSTOMER INTERACTION WITH PROACTIVE ENGAGEMENT

3X INCREASE IN CONVERSION

90%+ CUSTOMER SATISFACTION RATE

“Moxie Concierge allows us to assist our customers on their preferred channel and device. Increasing customer engagement through the Concierge solution improves revenue, average order value, and customer satisfaction.”

- Joan King, Vice President of eCommerce for Crate and Barrel
Chat and The Mobile Consumer

A great deal of ecommerce is now moving to the mobile platform. For example, in a recent survey, 47% of millennials said they regularly make purchases on their mobile devices.*

This means that chat cannot be isolated to just desktop transactions, but must become an integral part of your mobile experience.

*https://www.linkedin.com/pulse/customer-service-experience-way-gina-cuff
Is Mobile Chat Different from Web Chat?

The thinking used to be that mobile chat always had to accommodate the small screen with shorter communications and smaller amounts of information. This has not proven entirely true. The most important factor for mobile chat is the behavior of your customers:

- If your customers are “digital natives” who are completely comfortable with mobile, then chat can operate just as it does on your website.
- If your customers are less comfortable or resistant to mobile, a chat experience that provides shorter interactions and less information may be a better choice.

Mobile chat design principles mirror web design principles. Consider using multiple types of chat, such as a responsive tab and a button. Maintain chat placement consistency – if you have a button, make sure it is always in the same place on the mobile page.
Maintaining the Context

The key to a great mobile chat experience lies in the customer’s ability to keep context while chatting with an agent. You can do this with technology that allows mobile customers to chat and browse at the same time. This requires:

- A chat window that transparently overlays the screen, letting customers still see the page they are viewing.
- A convenient way to minimize the chat window so customers can continue browsing and then reopen the chat with a swipe.
- A visual cue for a minimized chat window that lets the customer know when an agent has responded.

It’s also important to accommodate sometimes unreliable mobile phone service using technology to reconnect a disconnected customer with the same chat agent so that the conversation can continue seamlessly.
LEARN MORE
If you’re interested in learning more about Moxie’s solutions for live chat, please contact:

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