

Greeting Customers on Live Chat

Best practice techniques for greeting customers on Live Chat.

This document forms part of a series of papers that deals with the Click4Assistance Experiences solution, live chat software and the many other features we provide. We recommend reading the range of papers as there are often references to other subjects with further information.

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Introduction

This paper focuses on live chat greetings from the perspective of operators, and examines associated best practices. Greeting a person over live chat presents some subtle differences to a face to face or telephone encounter. Therefore you may wish to vary the way you acknowledge people when they start a conversation.

To aid understanding of the topic, we have broken it down into several sub categories. We shall start by identifying the type of chat and examine how that can be used to tailor welcomes, before moving on to deal with the different ways to greet your visitor. The final section will highlight top tips from experienced operators in various different markets.

Identifying the type of chat

When an operator is presented with a new chat, it's good practice to examine the information presented to them and categorise the nature of the enquiry. Identifying the type of chat will aid the operator when deciding which welcome route to take. Here's a breakdown of the information available and the best way to use it.

Pre-chat form Pre Chat forms are used to gather information from your visitor before the chat begins. As with all aspects of the Click4Assistance solution, this form is fully configurable, allowing you to ask pertinent questions in order to inform your operators to the nature of the enquiry.

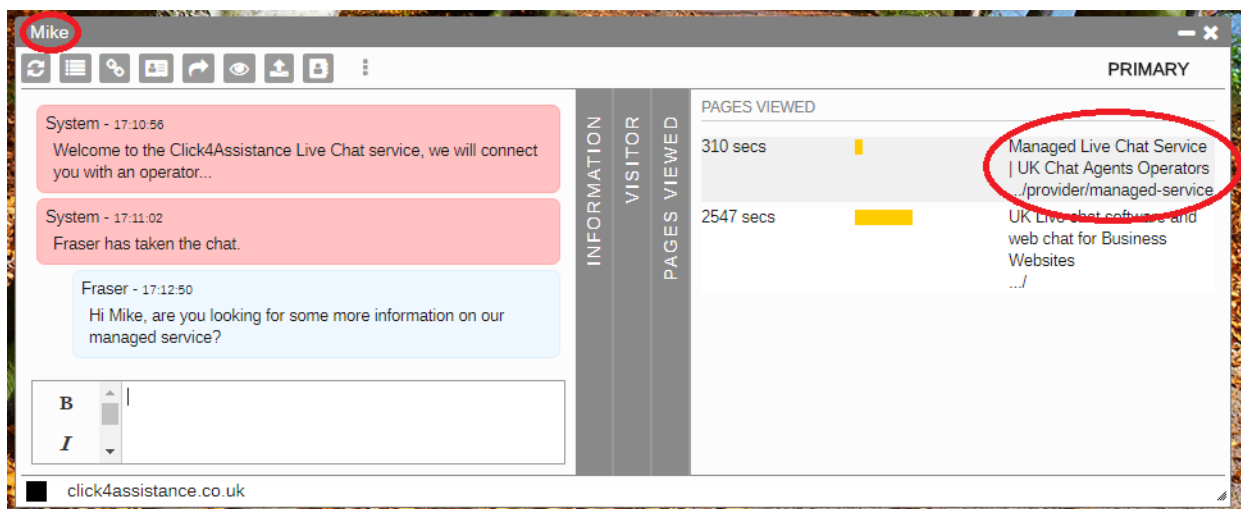
The type of enquiry they have selected on their pre-chat form may indicate whether it is a sales or support question. Visitors with support enquiries usually have a specific problem or question. With a sales chat, the visitor may have various questions or require more general advice on a product or service.

Adding a free text box enabling a visitor to ask a specific question before the chat can take this one stage further and save valuable operator time. As you know their question in advance, you may even be able to deal with the enquiry with just one reply!

The speed of response means the visitor leaves the chat satisfied, and the operator has not had to wait for a response, expediting the process and meaning they can move on quickly.

Which Button and Webpage prompted the chat?

Click4Assistance Experiences allows you to see which webpage the visitor was viewing when the chat started. Why not try personalising the greeting, include the visitor's name and ask them if they're looking for some information on a specific area. Let's see how this could work in the example below.



The screenshot shows the Click4Assistance chat interface. On the left, a chat history panel shows messages from the system and Fraser. The system messages are: "Welcome to the Click4Assistance Live Chat service, we will connect you with an operator..." and "Fraser has taken the chat." Fraser's message is: "Hi Mike, are you looking for some more information on our managed service?". The chat input area at the bottom has a text box and buttons for bold (B) and italic (I). On the right, a "PRIMARY" panel shows a list of "PAGES VIEWED". The first entry is "Managed Live Chat Service | UK Chat Agents Operators /provider/managed-service" with a duration of 310 secs. The second entry is "UK Live chat software and web chat for Business Websites" with a duration of 2547 secs. The first entry is circled in red.

INFORMATION	VISITOR	PAGES VIEWED
System - 17:10:56		310 secs
System - 17:11:02		2547 secs
Fraser - 17:12:50		

In this situation the visitor “Mike” started the chat whilst looking at the page about the managed service. The operator used this information along with Mike’s name, and created a personalised greeting. The sources of information have been circled in red.

Are they a returning visitor?

Click4Assistance informs you when a visitor has chatted or browsed your website before. Our live chat software stores this information, and it’s visible when a conversation is initiated. Why not welcome your visitor accordingly...

“Welcome back John, how can I help today?”

This will ensure John feels recognised and valued by your organisation. Transcripts of previous chats can also be held against the contact and can be used when greeting the visitor...

“Welcome back John, did you have a further question regarding your purchase, or can I help you with something else today?”

Alternatively, the conversion tracking module enables you to see if a visitor has made a purchase previously. This information can be used to personalise the welcome further, so you could write:

“Hi John, did you enjoy your holiday in Jamaica?”

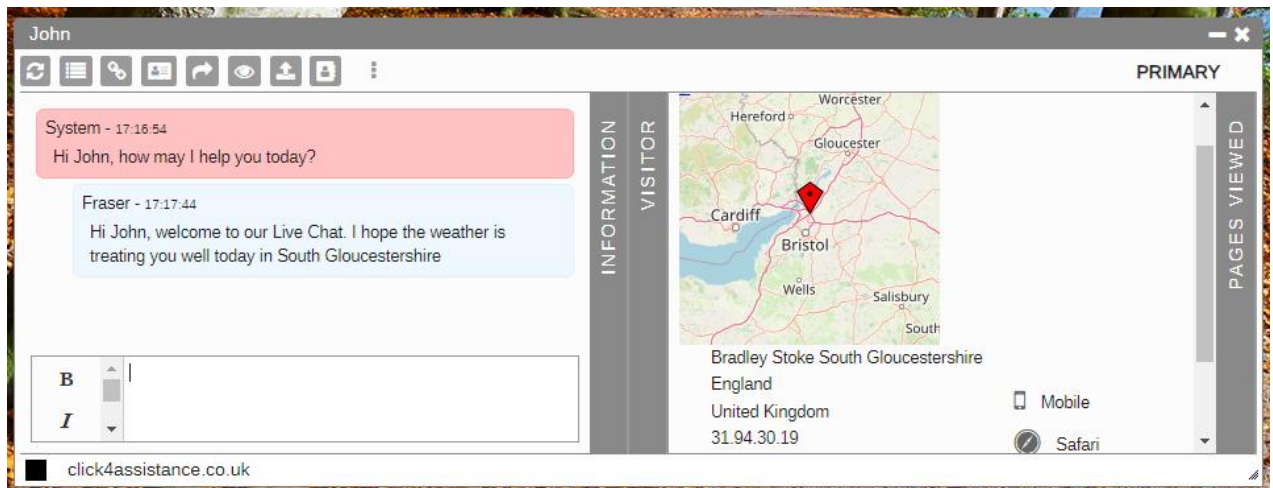
You may even want to consider starting a chat with “Hi, have you chatted with us before?” as statistics have shown that using this greeting can increase sales by around 16%. If this is their first visit, it opens up a line of communication with the visitor and allows the operator to introduce aspects of your business or products.

Source: Michael Gerber, author of “the E-Myth”.

The Visitor's Location

The Click4Assistance software can identify the visitor's location anywhere in the world. Why not use this to keep the greetings fresh and different.

Here's an example:



We trust you can see how this would be useful in starting the chat in a friendly and positive manner.

Inviting your visitor

Chat buttons rely on visitors starting the chat themselves, however proactive invitations can slide a message onto their screen to invite them to chat. Proactives offer a wide range of possibilities when it comes to greetings, and they can be used in various different ways. Have a look at these examples below for ways of tailoring greetings for different invitations.

Time on page

When a visitor has been viewing a page for a specific duration, you may want to offer additional assistance and send them a proactive invitation to chat. If accepted by the visitor, a chat will start. The operator can see that the person engaged the chat by clicking on a particular proactive and can use this information to greet them accordingly. For example:

“Hi, I see you would like some help with booking your holiday”

Special Offer

Send proactive invitations to promote your latest deals. If they are accepted the operator can respond appropriately:

“Hi Mike, we currently have 25% off this holiday, would you like some more information?”

If an issue occurs

Visitors can be invited to chat if they are having an issue, such as a difficulty making a payment. If the visitor is receiving a card error during the payment process, instead of getting frustrated and leaving the site, a live chat invitation appears and they take that option instead. The operator knows that they have accepted an invitation because they are receiving a particular error, so they can open the chat with...

“Hi there, I see you’re having some trouble making a payment, how can I help?”

This solution offers valuable benefits to companies who experience high bounce rates on conversion pages. Click4Assistance offers your company the chance to intervene instead of losing a visitor.

Now, you can see how important it is to know the nature of the chat you’re facing, here’s something to ponder about the type of welcome you use.

Types of Greeting

An important aspect of the welcoming procedure is deciding on the tone and specific language to be used in the greeting text. We recommend looking at the following suggestions, but be aware that your company may have their own guidelines which should be adhered to.

Formal

Formal replies are generally most effective in the following circumstances:

- B2B enquiries
- If you cannot distinguish the identity of the visitor that started the chat. E.g. if their name, company information or chat intentions are unclear.
- If the nature of the enquiry is support related. This doesn't mean you can't be friendly, however support enquiries often require a more professional approach to answer a question.

Here are some examples of formal replies in action.

"Hello you're through to Click4Holiday's live chat, how can I help?"

"Good morning, welcome to Click4Holiday's live chat service"

Informal

Using an informal approach to greeting visitors is just as effective, as long as it is used in the correct way. Here are some points to get you thinking:

- When the chat is sales orientated. It's often said that people don't buy a product, they buy a person. An informal approach is often better with sales enquiries as it helps build a relationship.
- When operators can see the visitor's intentions and feel comfortable taking on a more informal approach.
- If the operator can see the person has chatted previously, or they have personally dealt with them before, an informal welcome is appropriate.

Familiar

The familiar greeting category is closely associated with the informal one, and can be used in similar circumstances. But as you'll see in these examples, there is a subtle difference.

- It's more appropriate to use a familiar greeting when operators already have a relationship with the visitor.
- If you have previously answered support or sales questions from them.
- Personalisation is the key to familiar welcomes which will often include the first name of the visitor. Have a look below for some examples of this

"Hi John, it's good to see you again, how can I help?"

"Hi John, I hope you're looking forward to your holiday, is there anything I can help with today?"

Predefined Greetings

Click4Assistance's live chat software comes ready loaded with predefined replies that can be used to assist operators in answering questions. The software also allows operators or administrators to add their own to the list, on any subject they require. They can be used to create predefined welcomes which allow the operators to open a chat quickly and in an appropriate manner.

You can also include automatic personalisation. For example they could be set up to include the forename of the visitor like this:

"Hi Tom, how can I help?"

You could also include the operator's name.

"Hi Tom you're through to Sam, how can I help?"

Predefined greetings such as this can be accessed in two clicks, which is a serious reduction compared to the time spent typing out the full welcome. Including the key @VISITORNAME or @OPERATORNAME in the predefined reply will automatically enter the names of the visitor or operator each time.

Top Tips

Style is an important aspect of how chat operators communicate with site visitors. Consistently among communication channels is key as it ensures that the same service is given to every client who interacts, and that the company brand is maintained. If a chat operator is in doubt over a certain situation, then they should always refer to their company policy for guidance. However, there are some general rules and pointers that can make all the difference.

A Prompt first Response is Important

On average, a visitor expects a response to the opening of a chat within a maximum of 20 seconds. This indicates the importance of acknowledging your visitors early and showing them you are there to help. Just like when browsing in a high street chain, visitors feel more valued when they are greeted and acknowledged by the staff.

This can be difficult for live chat operators that are handling a high volume of concurrent chats, but there are ways to say hello quickly without losing the visitor. Why not greet them with

“Hello, you’re through to [Company Name’s] live help, I’ll be with you in a moment”.

By doing this, you give yourself time to work on other chats whilst your visitor does not feel neglected. Remember, a predefined reply could also be used to speed up the process.

Put yourself in your Visitors’ shoes

A visitor chooses live chat in order to receive a swift response to their question. If they have asked for the information straight away, they will be expecting a quick, to the point reply. It’s also important to treat them with the respect you would want to receive in the same situation.

Avoid overly familiar or slang terms

Being polite and friendly comes across much more natural and professional than attempting to use over familiar terms. In fact, they should be avoided at all costs, despite being used often in everyday verbal communication. An example of slang terms is text talk, such as shortening words so they are spelt incorrectly or including emoticons (smiley faces).

Coming across as overly familiar can be prevented by not using phrases such as “buddy” or “mate”. If in doubt, use a simple greeting that cannot be misconstrued. Alternatively, refer to the pre-defined replies to select a welcome which ensures you reply in compliance with your company’s brand. The Experiences solution comes with a range of pre-defined welcomes, or you can add some of your own to meet your company requirements.

Check Spelling and Grammar

Always make sure your spelling and grammar is correct so the greeting can be easily read and understood by the visitor. If in doubt, use the in-built spell checker.

Summary

Greeting a visitor on live chat is an important part of any sales or support service. Failing to acknowledge or recognise a new chat could mean losing a potential lead or even existing visitor completely. However, as the above examples have shown, there are simple ways to ensure this doesn't happen. The intelligent software allows chat operators to tailor greetings whilst keeping a professional approach. Pre-defined replies can also be used when operators are busy to promptly welcome visitors and inform them they'll be available soon. This allows the operator to communicate as the company requires and ensures the continuity of their brand is maintained.

Further Advice

Whilst advice on greetings is offered in this paper, we recommend that all chat operators comply with their company's own policy on visitor interaction. However, we trust that this paper will provide quality information so that internal policies can be continually revised and updated. All of the images used within this document are from test chats specifically set up to replicate real situations.