# Handling Sales Enquiries

## Best practice techniques for handling sales enquiries on Live Chat.

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



click4assistance.co.uk

0845 123 5871

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## Introduction

This paper details best practice techniques for using live chat software to handle sales enquiries. Through logical steps, the document navigates the processes from start to finish, and includes some tips on closing a sale on live chat. Subsections within the document include: preparing for the chat, automatic webpage navigation, using predefined replies, and the important differences in using live chat in B2B and B2C situations.

Not every sales enquiry is the same, visitors may be at different stages in the buying process. Whether they are ready to buy or just looking for information on a product, their chat experience can make a big difference to their final decision.

Using a live chat system to answer customer sales enquiries offers many benefits over a telephone or email system, such as:

<u>The speed of response</u>
With live chat, website visitors can get answers to questions extremely quickly, especially if it is only a simple question.

<u>Preventing miscommunication errors</u>
Live chat prevents miscommunication errors that can occur on the phone. Technical information on a product is also easier to follow when written, as there is no need for visitors to take notes, as the transcript can be emailed after the chat.

<u>Phone calls cost</u>
A phone call costs customers money, but clicking a chat button on your website is completely free.

<u>Increases productivity</u>
Chat operators can handle more than one conversation at a time, increasing their productivity and the amount of questions that can be answered.

## Sales Techniques

Sales enquiries can vary in length and nature, a visitor may only ask a single question, or they could be seeking in-depth advice on which product would fit their requirements. Before examining the tools available within the software, we will highlight sales techniques for both business to business and business to customer chat sessions. Click4Assistance always recommends that operators comply with their company's policy on visitor interaction, but we trust this paper will provide quality information, so internal policies can be continually revised and updated.

When handling sales enquires in a business to customer situation, consider the following.

<u>Build a relationship with the visitor</u>
It's often said that people don't buy a product, they buy a person. Be friendly and informative to the visitor; ask them open questions to ensure complete understanding of their requirements. If they already have a product in mind, answer their questions and ensure they have all of the information required to make an informed choice.

<u>Focus on the visitor and their requirements</u>
Trying to push a new product onto a visitor when it's not what they're looking for is unlikely to end in a sale. Instead, look at the visitor's requirements and find a product that will meet their needs.

<u>Sell a solution</u>
Visitors look for a solution to a problem when purchasing. Show them the benefits of the product and how it can be used as a resolution to their problem. Sell the benefits not the features.

<u>Think ahead</u>
Look for any possible reasons the visitor may have for not purchasing and attempt to deal with them before they arise.

<u>Don't rush your visitor</u>
Choosing the right time to close is difficult; rushing the visitor could risk losing a valuable lead. Make sure your visitor has all of the information they need and you have talked through any issues raised.

<u>Up or cross sell when appropriate</u>
Choosing the right moment to up or cross sell is also key. If you think a visitor may suit a slightly different product or version, make a suggestion. You should sell the benefits of this item in comparison to justify the up sell. Think about other products or services that may compliment what they are purchasing. For example, if you're selling a customer a holiday, you may want to suggest travel insurance.

<u>Can you compromise?</u>
What would be an acceptable compromise on your side to close the sale? Do you have authority to sanction a discount if it means closing the sale?

**If the chat session takes on a business to business format, you may want to look at these additional points:**

<u>Research the business</u>
Whilst at your computer, you could have a look in the pre-chat information and perform an internet search on the business you're dealing with. This would allow you to do a quick evaluation of the company and the market they are in, putting yourself in a greater position of power when it comes to evaluating their needs with regards to your products or service. It also allows you to get to know the size of the company you are dealing with, another important piece of information.

<u>Take on an advisory role</u>
Take a step back from the hard sell; offer advice on how your product could be integrated into their business. Highlight what benefits it could bring, explain how it could work for the business and answer the questions they ask. Remember, the individual you are chatting to may not be the ultimate decision maker, so ensure they are fully informed to pass on the information.

<u>Demonstrate you are professional</u>
Always demonstrate you are professional during the chat. If you say you will follow up, ensure you do. Remain in contact with them after the chat, be friendly and helpful but not over zealous in your approach.

<u>Gather relevant information</u>
With B2B enquires, there's a greater chance you won't be able to close the sale there and then. If this is the case, ensure you gather plenty of information on the business and the individual, so you can stay in contact whilst a decision is reached.

## Preparing for the chat

Before starting the chat session, you can discover valuable information about the sales enquiry. This can be used to evaluate the needs of the visitor in relation to your products or service. The pre-chat form is the main method of doing this and it can be configured to prompt visitors to enter data before the chat.

The Pre-chat Form

As with all aspects of the Click4Assistance solution, the form is fully configurable, enabling you to request that customers enter certain information. This allows you to ask pertinent questions to inform your operators to the nature of the enquiry.

This data can be used by the operator to distinguish the following:

- **The nature of the enquiry**
  The pre-chat form could request customers enter their query into a text box, so operators know the product or service they are interested in purchasing.
- **Customer or business information**
  Gathering their name, and if applicable, which business they work for, ensures existing or previous customers can be identified. This allows operators to distinguish if they have previously bought products or services from your company.
- **Which chat button and webpage prompted the chat**
  Operators can see where the customer started the chat e.g. which page they are viewing, or if a proactive invitation was accepted. This could supply further information on which product or service they are looking to buy.

Proactive Invitations

Proactive invitations can be configured to prompt viewers to start a chat. Operators can then see if a visitor came to the chat through a proactive, and if so, which one. If a proactive is accepted, it suggests to the operator the area they are looking for information in. Fully customisable, proactives can be designed to promote special offers or ask visitors if they need more advice on a certain subject.

Using the data

Operators can create a personalised greeting for a visitor, based on the information provided. For more details on this subject, please refer to *the greetings information paper*.

If a visitor had entered their name and that they're looking to book a holiday in Cyprus or accepted a proactive on that page, the operator could open the chat with:

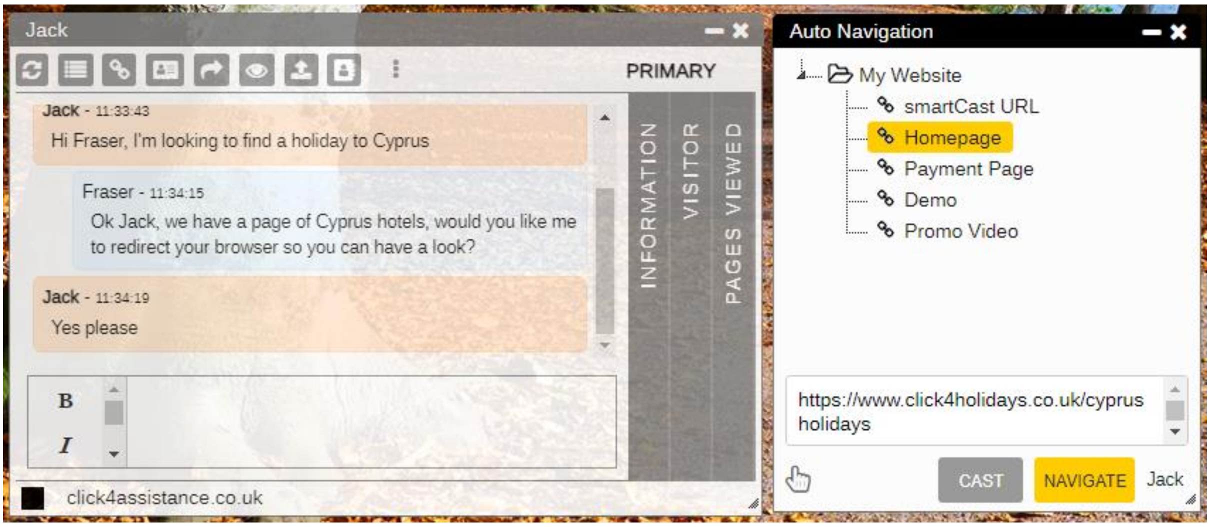
*"Hi [Forename], I see you're looking at booking a holiday to Cyprus, is that correct?"*

In this example the operator used the information to confirm the nature of the enquiry, enhancing the customer experience while ensuring they feel recognised and valued.

## Automatic Redirect URLs

Automatic Redirect URLs are used to navigate your visitor's browser to a new webpage without closing the chat window. These can be set up to include any webpage you require, on any site not just your own. For more information on how to add your own automatic redirects, please refer to the 'How To' guide within the software.

Here's an image of an operator selecting an automatic redirect URL.




This enables you to 'walk' a visitor through your site towards products, much like an assistant in a bricks and mortar store. Show your visitors the product's pictures, specifications or brochures. Rather than explaining what they can do, direct their browser towards a page showing them. When closing a sale, you could redirect them to a conversion page such as a sign up form.

The co-browsing feature also enables you to see what your visitor sees, making it easier to point out various areas on the page while chatting to them.

<u>Etiquette</u>

When using automatic redirect URLs, you shouldn't send them without asking the recipient first. If you do, it can be confusing and could possibly lead to the chat session being abandoned by the visitor. A simple "Can I redirect your web browser to that page?" is sufficient and you can proceed if they agree. It's good practice to inform them of what will happen, and which page you are sending them to.

## Predefined Replies in Sales Enquiries

This section will detail how predefined replies can be used within sales enquiries.

What are predefined replies?

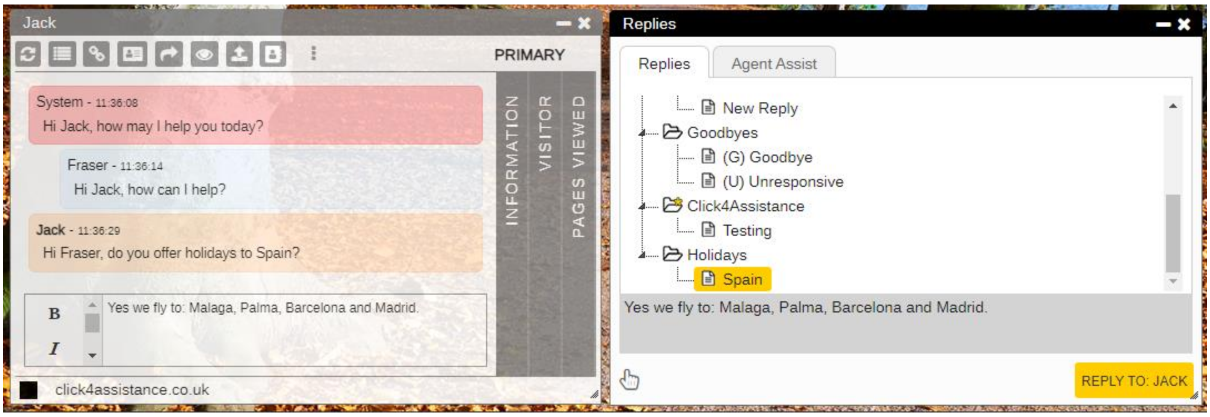
Click4Assistance's live chat software comes ready loaded with standard predefined replies that can be used to assist operators in answering questions. With two simple clicks, they can quickly add a prewritten response to a question in the chat, without having to type it out in full. The software also allows operators or administrators to add their own predefined replies, on any subject they require.

Creating groups to store the replies ensures they are easy to locate. For example, a holiday company can create group headings such as Destinations, Hotels and Flights. This means operators can source replies quickly, containing answers to the relevant questions.

Why predefined replies work in sales enquiries

Predefined replies streamline the sales process and prevent deviation. Operators can give an answer to a frequently asked question quickly and accurately.

Speed of reply




Having a predefined reply for this ensures the operator can reply to the sales enquiry quickly without having to type out the same reply repeatedly.

Ensuring accuracy and consistency of answers

Taking the above example, the operator can be confident the answer was correct.

A predefined reply ensures that answers given are completely accurate, and in the case of a holiday company, it stops operators having to remember all of the resorts they fly to. They also ensure an operator doesn't give out incorrect information that loses a potential customer.

Consistency among communication channels is key as it ensures the same service is given to every client who interacts, and the company brand and customer service policy are maintained. Predefined replies complement this, and ensure the answers are given in accordance with your company requirements.

Sales questions on technical products could mean providing specific industry relevant answers. Predefined replies ensure the answers given are always consistent and supply the customer with the correct information.

## Concluding the chat

Concluding a sales enquiry on live chat differs slightly from a support query. Operators need to make the decision on whether to try and close the sale, or extract quality information from the visitor to create a valuable lead.

Making this decision is difficult, so have a look at the following points for guidance on closing:

- Stay in the chat to answer all the customer’s questions, and ensure they are completely satisfied with the information they have been given.
- Show the customer the product in action with an automatic redirect URL. • Explain the benefits of the product or service and how it will solve their problems.
- Be interested in meeting the customer’s needs before trying to close too soon.
- Up or cross sell only at the right opportunity. Customers are more likely to buy if they feel you are suggesting a better solution to their problem.
- Ask the customer if they need any more information, then ask for the sale.
- What can you give in return? Can you offer a small discount?
- If the customer wants to buy, make it easy for them. Direct them towards the checkout with an automatic redirect URL.

However, if the customer seems unlikely or unwilling to purchase, then think about the following:

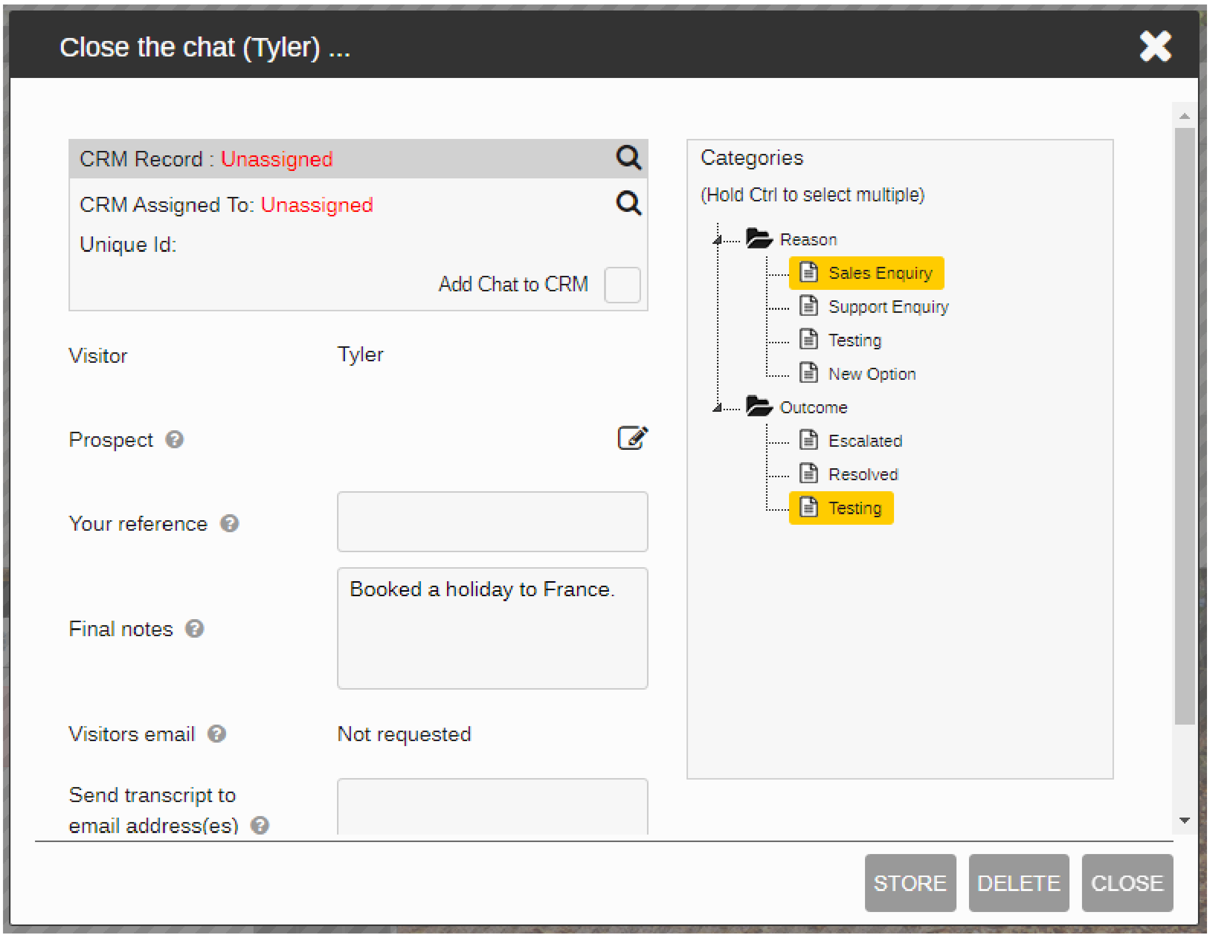
- Be prepared not to close, don’t risk losing a new lead that may return in the future by trying to force a sale.
- Get permission to send the visitor information to an email address. E.g. newsletters, white papers etc.
- The visitor then has your email address and all of the information to allow them to close in their own time.
- Add them to your CRM system as a lead and attach the chat notes; schedule yourself a follow up to ensure it is done.

• Remember, always adhere to company policy in how you talk to and treat customers!

<u>Categorising</u>

When a chat has come to an end, the operator will be prompted to categorise by the nature of the enquiry. It’s important to do this for reporting purposes, and the Experiences solution comes with pre-loaded groups and sub groups for categorisation. Additional can be added based on the needs of the business.

Here's an example of an operator closing.




When done correctly, this means productivity assessment can be efficient and accurate.

Stored chats can be viewed to gain an insight into:

- The sales questions being asked, to update your knowledge base
- How successful sales chats were handled, how did they close?
- How unsuccessful chats were handled, why wasn't the operator able to close?
- The duration of chats and operator response times
- Which products are popular and unpopular

All of this information can be used for streamlining and improving existing business procedures.

If a customer has requested an email transcript for further information, it will be automatically emailed to them when the chat is completed by the operator.

<u>Following up enquires</u>

Following up your sales enquiries effectively is equally as important as giving good information during the chat.

If a visitor has decided not to purchase during a chat, but has agreed to let you send them more information by email, then make sure you do so. A reminder can be set up on the Experiences solution, and it will appear on your homepage. This ensures the lead is not lost, and gives the visitor the chance to close in their own time.

## Conversion Tracking

An important part of sales is being able to track conversions, and with Click4Assistance you can do just that. The Experiences solution includes the ability to track conversions back to the successful operator, for productivity assessment.

<u>But what is a conversion?</u>

A conversion may be slightly different to everyone, depending on the nature of their business. To a retail website, it would be when a purchase is made, but to the service industry, it may be when a quote request or registration is made.

<u>How does it work?</u>

The conversion tracker works by registering when someone hits a certain page on your website.

The software will store the following about a customer:

- How they came to your website
- Which keywords were used
- Whether it was a chat assisted conversion
- If so, which operator controlled the chat

The main benefit of conversion tracking is the ability to run reports on the various criteria. From there, management can view and analyse the reports generated to assess the productivity of:

- Operators
- Their keywords
- Pay Per Click campaigns
- Search engine optimisation strategy

## Summary

In summary, this paper highlighted how our live chat software can be used to effectively handle sales enquiries. After offering advice on sales techniques in both B2B and B2C enquiries, we explained some of the features available within Click4Assistance to aid with this process. These included; predefined replies for consistency and accuracy, automatic redirect URLs for showing pages, proactive invitations and the pre-chat form for gathering information. The section on concluding the chat gave advice on how to close a sale, before explaining the importance of correctly categorising chats for reporting purposes.

## Further Advice

Whilst advice on sales enquiries is offered in this paper, we recommend that all chat operators comply with their company's own policy on customer 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 taken from test chats specifically designed to replicate real situations.