Handling Support Enquiries

Best practice techniques for handling support 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.

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Introduction

This paper details some of the best practice techniques for using live chat software to handle support enquiries. Through logical steps, the document navigates the processes associated with support enquiries from start to finish and includes some top tips from experienced operators. Subsections within the document include: using the pre-chat form, predefined replies, and following up enquiries.

Support enquiries can arise from a variety of different customer questions. Not necessarily product specific, they could occur before during or after a sale has been made. For example, someone who has just booked a holiday may need to make a change to their booking, or require advice on paying their deposit; this is a post sale support enquiry.

Using a live chat system to answer customer support queries offers many benefits over a telephone or email system. Speed of response is the main advantage, but live chat also prevents miscommunication errors that can occur on the phone. Lengthy or complicated instructions are also easier to follow when written. There is no need for visitors to take notes as the transcript can be emailed after the chat.

Preparing for chat

Support questions are often more in-depth than sales enquiries, it can take several replies before a solution is achieved. Support enquiries can come from existing customers or site visitors, but for the purpose of this document, we will refer to them as customers. Preparation is important when handling enquiries in a support environment. The pre-chat form can provide valuable information about the enquiry you are receiving.

<u>The pre-chat form</u>

Pre-chat forms are used to gather information from your visitor before the chat begins. As with all aspects of the Click4Assistance solution, the form is fully configurable, allowing you to request that customers' complete information. This means you can ask pertinent questions to inform your operators to the nature of the enquiry.

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

- **The nature of the enquiry**
  The pre-chat form could request customers to enter their query into a text box, potentially allowing operators to answer the question in one reply.
- **Customer and business information**
  Gathering the name of the customer, and if applicable which business they work for, ensures existing or previous customers are identified. This allows you to differentiate any specific requirements.
- **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 information ensures operators are prepared before starting to deal with the enquiry.

<u>Using the data</u>

Operators can create a personalised greeting for the customer, based on the information provided. Please refer to the *<u>greetings information paper</u>* for more details on this subject.

If a customer had entered their name and a request to change an existing booking, the operator could open the chat with

"Hi [Forename], I see you're looking to change your existing booking, is that correct?"

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

Knowing the Customer

The information gathered during pre-chat can be integrated with your company's existing CRM system to record the finer details. This also allows the operator to acknowledge any support or service level agreements in place with the customer. Reading previous chats stored against the customer will ensure that operators are aware of any ongoing support issues currently in progress. The current location feature on the software also means you can transfer the chat to a local agent in that location to deal with the enquiry.

Gathering the Relevant Information

Asking the customer for specific details ensures you can build an accurate picture of the enquiry before attempting to achieve a resolution. It's better to do this at the start of the chat so you know exactly what the customer's requirements are.

Once the relevant information has been gathered, the operator can analyse the situation to ensure they can help the customer, or decide to refer to another staff member.

When the Immediate Answer is not available

Customers generally understand that not all enquiries have straightforward answers, and further investigation may be required. However, they will expect to be kept informed as the situation progresses. If an operator cannot provide an answer immediately, they have the following options:

Putting the customer on hold

When more information is needed, keep the customer up to date on the situation. Explain they will be put on hold whilst you deal with their question, politely make them aware of the situation and that you will be back shortly. This will ensure the customer is comfortable while waiting and dissuade them from abandoning the chat. Check back with a brief message if the delay is extended; make them aware of the progress and confirm they will remain connected to the chat session.

Escalating an enquiry to an colleague

If you cannot answer the query and decide to transfer the chat, notify the customer explaining why this has happened. If possible, refer to the co-worker by name to ensure the customer knows who they will be dealing with. Let the customer know there may be a brief delay before the transfer occurs. This will enable the new operator to review the chat transcript and prepare a greeting and response to the enquiry.

Inviting a colleague into the chat

Instead of escalating the chat to a different operator, you could invite them into the current session. This enables continuity of customer service, and ensures the first operator maintains ownership of the chat. The customer then benefits from the full knowledge base of your company's operators.

Using the training room

The Click4Assistance Experiences solution provides an operator training room, where you can ask questions to all of, or an individual colleague. This can be used to get a quick answer instead of escalating the chat or directly involving another operator. Often this will require that you briefly put a customer on hold while you investigate the answer. Please ensure the guidelines above are followed in this situation.

Using an automatic redirect

If lengthy or detailed information is required, refer the customer to a specific page within your website. The automatic redirect function will change the customer's browser to display the relevant webpage. This may be particularly useful if the operator needs to show the customer a series of complicated steps that would be easier to understand when being read on a web page rather than a chat window.

Predefined Replies in Support Queries

This section will show how predefined replies can be used in support queries.

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.

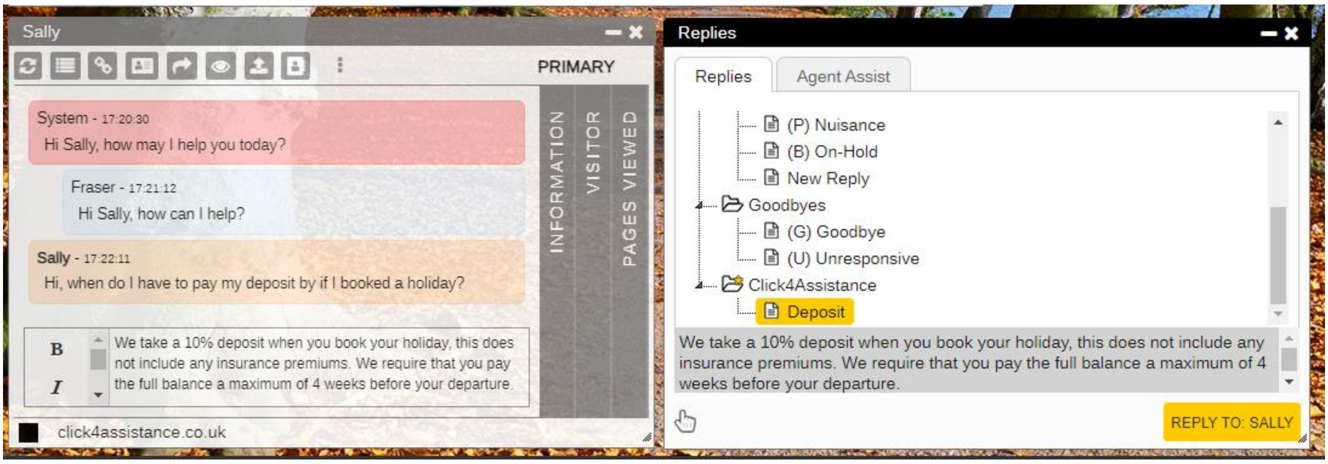
Creating groups to store the replies ensures they are easy to locate. For example, a holiday company can create group headings such as Bookings, Insurance and Baggage. This allows operators to source replies quickly, containing answers to the relevant frequently asked questions.

Why Predefined Replies work in Support Queries

Support enquiries require an accurate, concise and quick response. Predefined replies enable operators to respond quickly whilst ensuring consistency and accuracy of answers, as they are based on your company's knowledge base.

Speed of Reply

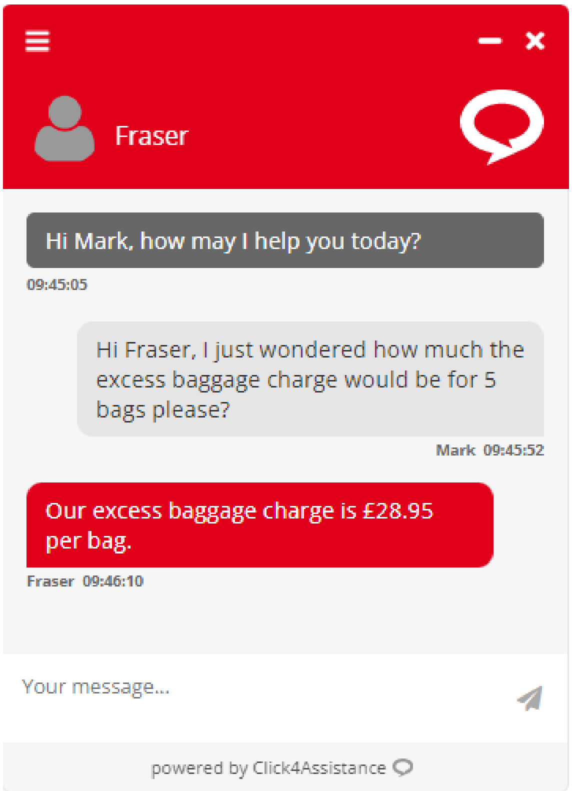
Having a predefined reply set up that contains a small statement prevents operators having to type out the same reply repeatedly, and conforms to your customer service policies.

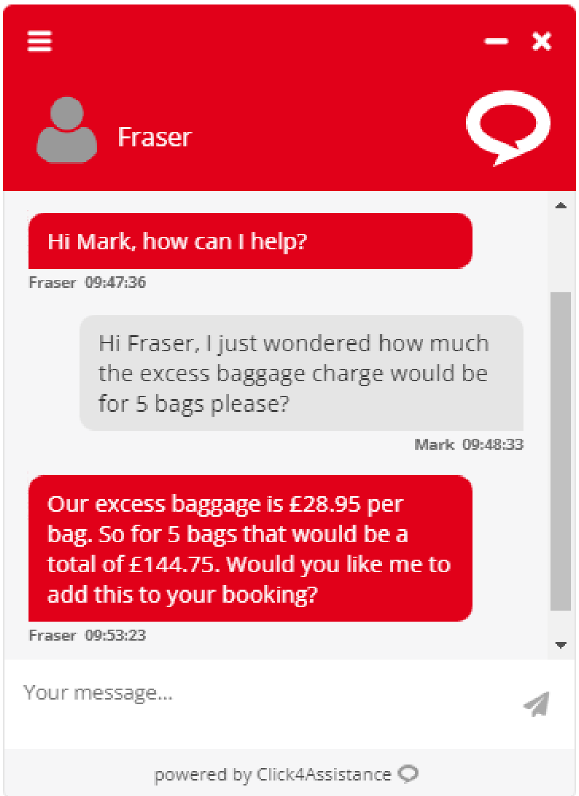


Ensuring Accuracy

If the customer has specific requirements, a standard reply may not suffice. In this circumstance a predefined reply can be used, but it should be edited before sending. Remember, if the reply doesn't fit the question it could make the customer feel the operator isn't listening or understanding their needs.

Here are two examples:





Here the operator went a little further by editing the reply and ensured the question was answered correctly.

Ensuring Consistency

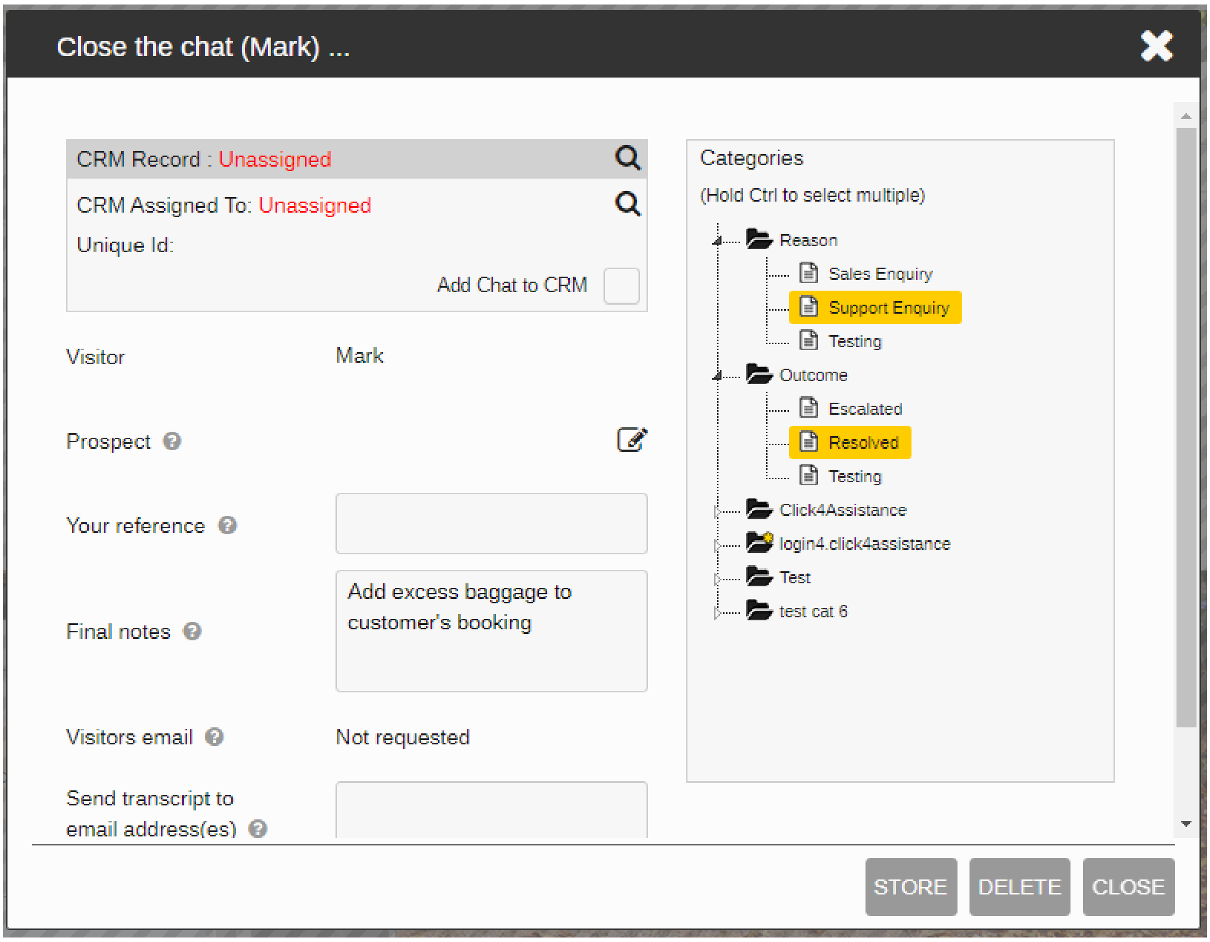
Consistency among communication channels is key as it ensures the same service is given to every client who interacts, and the company brand and customer service policy are maintained. Predefined replies comply with this, and ensure the answers are given in accordance with your company requirements.

Providing support on a product or service can mean answering complicated or technical questions. Predefined replies ensure the answers given are always consistent and supply the customer with the correct information.

Concluding the chat

At the end of a chat, the operator will be prompted to categorise the nature of the enquiry they have just dealt with, and it's important they do this correctly for reporting purposes. The Experiences solution comes with pre-loaded groups and sub groups for chat categorisation, however administrators can add their own categories based on the needs of the business.

Here's an example of an operator correctly closing.



When done correctly, this enables productivity assessment from a management perspective.

Stored chats can be viewed to gain an insight into:

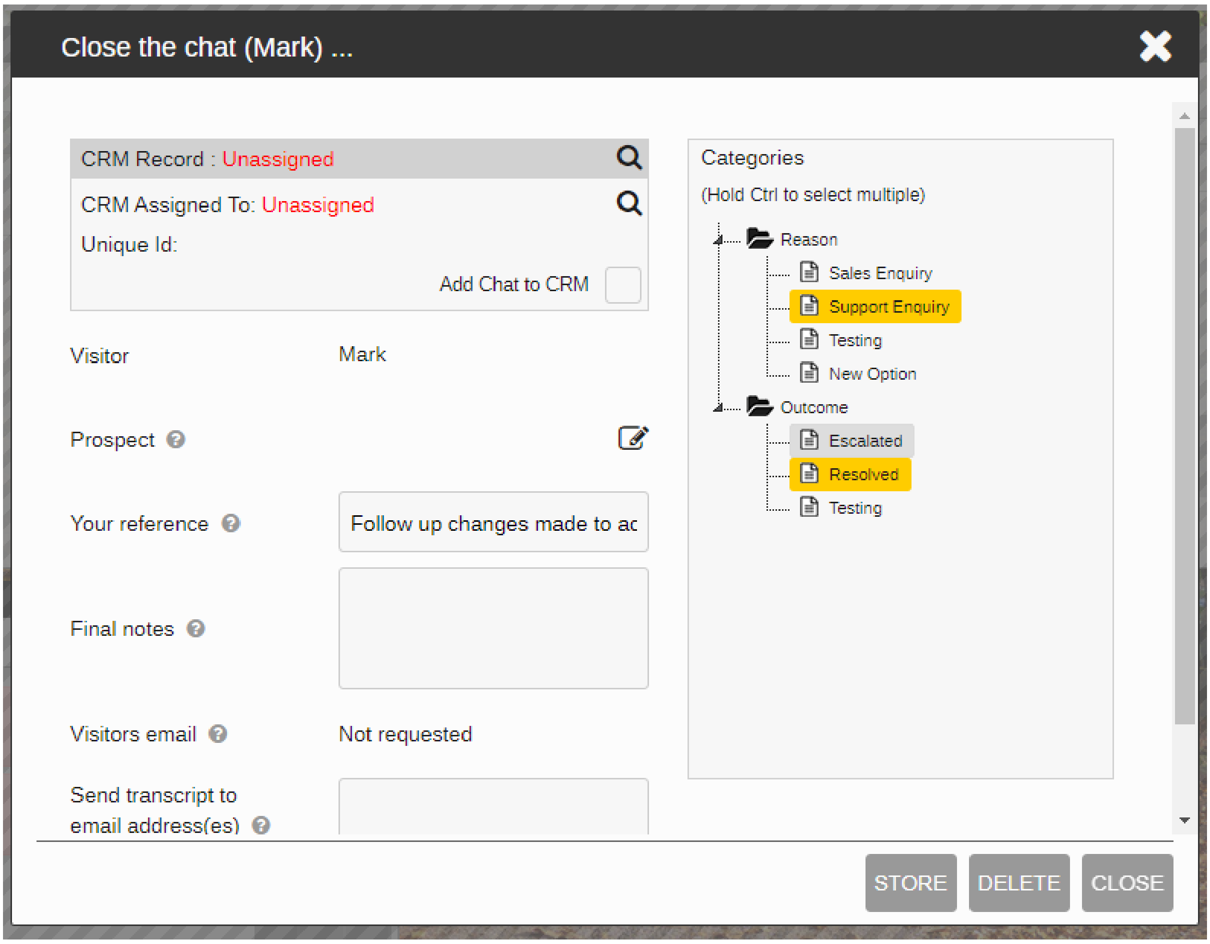
- The questions being asked, which can update your knowledge base
- How successful chats on a certain topic were handled
- How unsuccessful chats were handled and what could be improved?
- The duration of chats and operator response times
- Identifying training needs

All of this useful 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.

Following up Enquiries

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

If a formal quote needs to be sent, a reminder can be entered when the chat is closed and it will appear on the operator's homepage. This ensures the quality of support is continuous through all channels, even after the chat has ended.



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Top Tips

Chat operators dealing with support issues should always remember to open the conversation politely and promptly ask the customer to explain the issue at hand. Here are some top tips.

<u>Know the business and product</u>

How well do you know products offered by your company? An in-depth knowledge of your area within the organisation is vital when providing live support. Customers use the live chat route because they want a quick response, therefore it’s essential you provide reassurance that you can help them.

<u>Have information at hand</u>

Having access to information is vital when dealing with support queries. Knowing how to source answers to customer questions is a must. Whether this is by: using predefined replies, asking a colleague, referring to company documents, or directing the customer to an appropriate webpage using an automatic redirect. Being able to locate information quickly is good practice and will help improve the level of customer satisfaction.

<u>Pay careful attention and ask the right questions</u>

Paying full attention and asking the right questions work together. Miscommunication on which exact product version could mean a lot of wasted time for you and the customer. Ask for the exact booking reference, or product number at the start of every chat. Don’t be afraid to ask questions, building up an exact picture of the problem is good practice before you start trying to make a diagnosis. Clear simple questions will help you do this, and keep the conversation flowing in the right direction.

<u>Know when to escalate a chat</u>

It’s important to know when to escalate an issue. If you receive a chat you can’t deal with, think about the following before escalating it.

1. Get good information on the customer’s enquiry, so when the chat is passed on, the recipient knows exactly what the situation is.

2. A decision should be made as quickly as possible so the process is streamlined and the customer isn’t left wondering what’s going on.

3. It’s good practice to explain the situation to the customer and tell them exactly what you are going to do and what they should expect to happen.

4. A predefined reply could be set up to inform the client that you are gathering further information and will be back soon. Customers will be fine with this as long as they feel their query is being worked on.

5. Select the correct operator. Using the information collected, you should be well positioned to pass the chat on to whoever is best qualified. Always check the correct person is selected to prevent the customer from being transferred again.

Remain calm and clear

Spelling and grammar should be completely accurate so the customer can fully understand the questions and advice being offered. Staying polite, friendly, but on track with the chat should ensure that a solution is reached.

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 emote icons (smiley faces). Coming across as overly familiar can be prevented by not using phrases such as “buddy” or “mate”. If in doubt, use a neutral term that cannot be misconstrued.

10 top tips for handling an irate customer

Dealing with a customer who is angry or upset can be very difficult, but these steps can help ease the situation:

1. Let the customer type. Read what they say and don’t interrupt, this will allow them to get their point across and give them time to calm down.

2. Allow the customer to express themselves and give their opinion on the matter, but remind them that inappropriate behaviour is not tolerated should the need arise.

3. Recognise any mistakes that may have been made on your company’s part, and be sympathetic towards them.

4. When the customer has given their version of events, confirm key information and facts.

5. Take ownership of the customer’s issue, and reassure them you will take every available step to reach a resolution. Explain exactly what you’re going to do and ensure you do it.

6. Throughout the chat, when resolutions are being offered to the customer, ensure they are happy and get responses to verify this.

7. In the end, confirm with the customer what has been agreed during the chat, even if it’s not a full resolution.

8. If a follow up is required, enter a reminder to ensure it is completed promptly.

9. Send them an email of the chat transcript for their future reference.

10. Finally, write detailed notes on the chat including the issue and what was proposed to fix it. This can be stored against the chat and entered at the point of completion to be used by other operators should the customer return.

Always turn negatives into positives

If the above steps are followed when dealing with upset customers, then a negative situation can be turned into a positive one. It's often said that it's easy to do things right when everything is running smoothly, but it's how you deal with problems that matter. Promptly and politely solving issues will show the quality of your customer service. It can even open an additional channel of communication with customers. Following up grievances after the event, builds on this relationship and ensures the lasting impression of your company is a positive one.

Summary

We have seen how live chat can be used to effectively handle support enquiries and emphasised tips for best practice. The advice included, ensuring operators have detailed knowledge of the products and services provided, and that clear questions were asked. We looked at predefined replies, a feature that allows the consistency of answers to be maintained, but also explained how they should be edited when used within support chats. In a final section, the importance of following up chats was highlighted along with the system's ability to schedule tasks to be completed at a later date. These sections combine to provide excellent customer service when handling support enquiries.

Further Advice

Whilst advice on support 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 from test chats specifically set up to replicate real situations.