Unleash business value from next-generation chat: 6-step approach

Savvy businesses have successfully used web collaboration tools such as chat and cobrowse to attract, win, and keep customers. However, these tools pay off only if you leverage best practices from selection to deployment and continuous improvement. Here’s a six-step plan to get it right.

**Step 1: Know your technology**

Not all chat tools are created equal. Make sure the chat solution offers comprehensive functionality, including routing, workflow, monitoring, agent-to-agent collaboration, ability for supervisors to monitor and “barge in”, reporting, analytics and knowledge management. Integration with other channels is equally important, without which the customer experience will be disconnected across touchpoints. For instance, the chat agent shouldn’t ask the customer to repeat information that had already been shared by the customer through web self-service.

In order to stand out, look for differentiating functionality such as the following:

- Ability to make proactive offers at the right place and time, based on intelligent, configurable rules and even case-based reasoning. The offers could be contextual content, coupons, as well as offers for any real-time service, not just proactive chat
- Next-gen capabilities like video chat and simultaneous cobrowsing with chat or phone interactions. Digital customers are often looking for multiple collaboration options and the ability to switch seamlessly from one to another during the same session – one could call it “superchat”!
- Chat over mobile browser or in-app chat
- All of the above integrated with each other and other interaction channels for a true 360 degree customer view for the business and a connected experience for the customer

**Step 2: Start small and smart**

It’s a good idea to start with a limited rollout, expanding the deployment once your agents are trained on the tools and issues are resolved.

You could consider placing the chat button in specific places at first, for example, in an authenticated area of your website. If you place it everywhere, you might receive more chat requests than agents can handle. Consider offering proactive chat selectively – for example, if the user seems to be stuck on a
certain web page or the shopping basket value is above a certain threshold to warrant high-touch, real-time service.

Finally, avoid forcing customers to download or install software for collaboration. Downloads create poor customer experiences and lead to higher abandonment rates. Moreover, some customers balk at them due to concerns about downloading malware.

**Step 3: Set up agents for success**

Agent experience and effectiveness are critical to the success of chat deployments. Here are some best practices that can help:

- Use multichat, but only to a point. The time delay between typing, sending, and receiving messages allows agents to effectively conduct multiple chat sessions simultaneously. Five seems to be the limit, and three is best practice.
- Empower agents with knowledge. A common multichannel knowledge base can help reduce both training and response times significantly, while delivering the same right answer across touchpoints. With the help of the knowledge base, new hires become effective immediately. Chat is just a communication tool; only knowledge delivers the right answer!
- Deflect long-lived, complex interactions to other channels like phone. You don’t want chat agents to be stuck in protracted and inefficient chat sessions in such situations – it will be a losing proposition for the customer, agent and the business.

**Step 4: Remember your brand is on candid camera**

In the case of video chat, make sure that the reps you are putting in front of the camera are aligned with your brand personality and values. Agent hiring and training becomes even more important in this case. Moreover, the surroundings of the agent should reflect your brand as well; this means not only making sure that the physical environment of the contact center is brand-aligned but also the surroundings of work-at-home virtual agents or outsourced agents as well. Make sure you are able to offer one-way or two-way video chat, depending on customer preference and the use case.

**Step 5: Monitor and analyze**

Monitoring is critical for all real-time interaction channels. In fact, do not deploy until you have tested your solution’s volume and quality monitoring features.

Treat web collaboration like any other support channel: set goals, define metrics, track, and report on them. Moreover, make sure the metrics are aligned with the goals of the contact center. For instance, average chat handle time is a common metric for contact center efficiency. However, research has shown that pushing agents to reduce average handle time will often make them ignore other important metrics such as first-contact resolution and revenue generated in the case of sales-focused contact centers.
Step 6: Get the word out

The success of chat and cobrowse on your website depends on how well you market it to your current and prospective customers. Here are some tips:

- Include a live chat link in outgoing e-newsletters, notifications and promotional emails
- Offer chat invitations while engaging with customers through social media
- Encourage customers to use chat instead of phone for faster service during peak traffic
- Multichat is typically less expensive than phone calls
- Use IVR recordings to encourage customers to try chat when phone hold times are at risk of exceeding accepted SLAs

In short, taking a goal-aligned, best-practice approach to technology, people and process, and leveraging next-gen chat technology for differentiation, will ensure chat success.

About eGain

eGain (NASDAQ: EGAN) customer engagement solutions power digital transformation strategies for leading brands. Our top-rated cloud applications for social, mobile, web, and contact centers help clients deliver connected customer journeys in an omnichannel world. To find out more about eGain software, visit http://www.egain.com/products/.