



**for Live Chat Supervisor
and Admin Success**

Best Practices for Supervisors and Admins

INTRODUCTION

For contact center agents, delivering an average customer experience can be a challenge, let alone delivering an exceptional one. But great customer service isn't a fantasy—hundreds of companies deliver it daily. In fact, a recent Forrester study showed that the number of companies with “good” or “excellent” customer experience index scores has steadily increased between 2007 and 2014.¹ And we know why: It's a combination of great people, processes, and technology.

I recently interviewed an outstanding contact center agent at a customer site and asked her if she preferred being on chat, or answering the phones. I'll never forget her response: “I love being on chat. I wish I could throw away my phone and always be on chat, every day.” When I asked her why she preferred chat, I expected her to answer something like, “It's easier,” or “I don't have to talk to them.” But that's not what she said.

“I enjoy being able to help – I mean really help – more than one person at once.”

She was genuinely enthusiastic about live chat's ability to support efficient concurrency. Was this excitement innate for her? Perhaps. And perhaps her company's culture attracted her enthusiasm, or nurtured it, or both. Certainly, people are everything to the success of live chat, but even the most dedicated supervisors and administrators will fail without the right support, processes and tools. This short checklist addresses successful live chat practices that can help make your company's dream of excellence a reality.



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LogMeIn

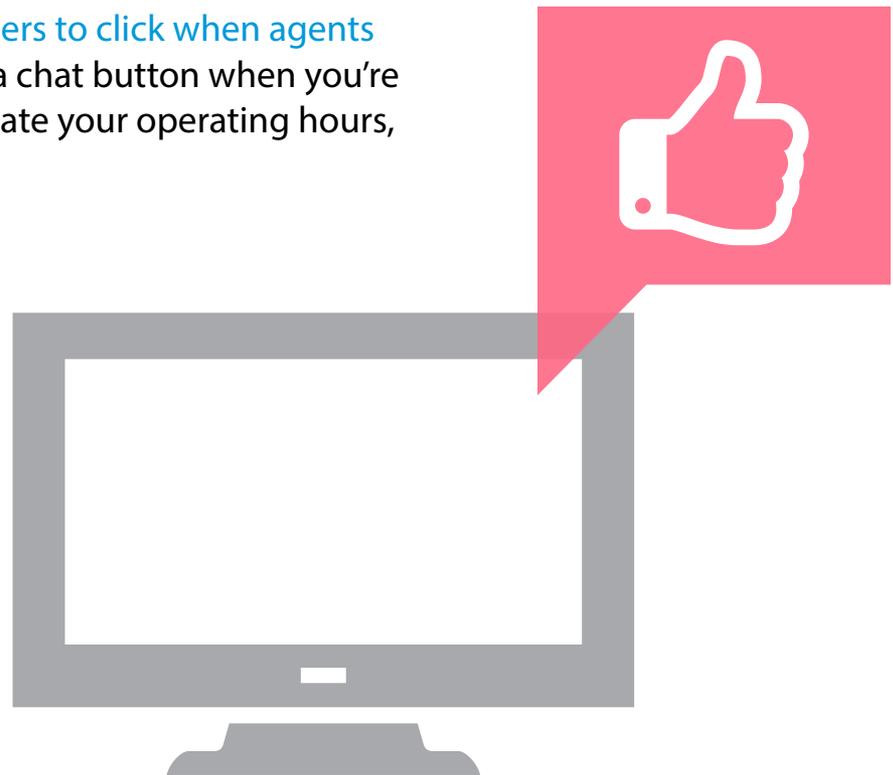
¹.Forrester, The Customer Experience Index, 2014

OPERATION LIVE CHAT:

Tips for Supervisors and Admins

1. Make it easy for customers to chat with you

- **The location of your chat button is key.** Survey respondents ranked the upper right-hand corner of web pages as their #1 preference. Don't try to be so creative with your placement that you end up losing customers.
- **Make sure chat features are visible on every page of your website.** Chat buttons should be large enough to be seen, but not so overwhelming that it looks like all you want customers to do is chat. In high-value areas like sign-up forms and shopping cart pages, consider having multiple chat buttons in different locations on the page.
- **Post chat hours to encourage customers to click when agents are actually available.** It's ok to show a chat button when you're not available, as long as you clearly state your operating hours, including time zones.





2. Help agents be successful

- **Provide adequate training for all agents prior to putting them on live chat.** Chat agents are trusted with one of the most valuable assets a company has—its reputation. Don't set them free until you've equipped them with the knowledge, skills and tools they need to thrive. Pair new agents with experienced agents, so they can help support and collaborate with one another.
- **Train staff to manage multiple chats simultaneously.** Managing multiple chats requires supervisors to commit to providing agents with a higher level of training. Choosing a chat product that allows agents to stack chats across multiple monitors can be beneficial.
- **Utilize a load balancer to ensure chats are evenly distributed among agents.** Load balancing is an effective strategy to make sure that everyone has a steady—but not overwhelming—stream of chats in the queue. Overwhelmed agents are prone to mistakes and can seem impatient or stressed, creating a poor impression with customers.
- **Develop a system that allows agents to transfer a chat to a more experienced agent or supervisor when they encounter questions they can't answer.** Transferring a chat when the initial agent can't formulate a solution shows that your business has a deep bench. Creating processes for dealing with specialized topics or issues also shows chatters you are serious about solving their problems.

3. Knowledge sharing is key

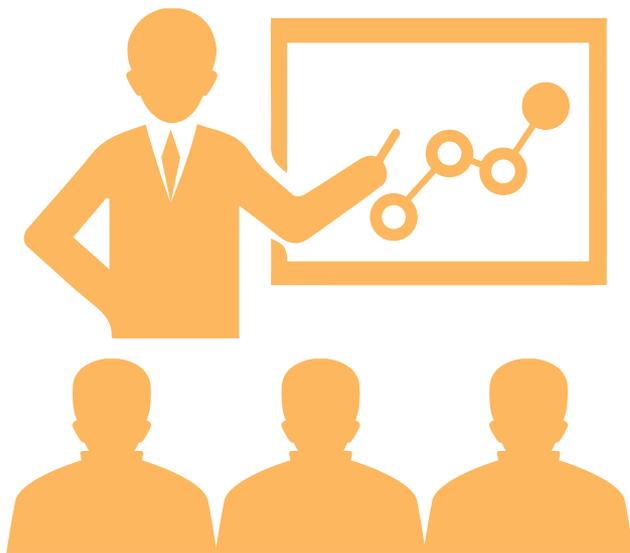
- [Schedule regular briefings with marketing personnel.](#) Agents are on the front line with customers, so it's important to keep them in the loop about new branding strategies and marketing initiatives. This type of interaction enables them to promote sales right from the chat floor, and also allows feedback to flow back from agents to development, management, and production teams.
- [Inaccuracy can sink a chat fast.](#) Make sure the company or product information your agents are sharing with customers is accurate and up-to-date. Chatters won't believe your company is aligned if your agents don't have the latest information about product releases, developments, and policy changes.

4. Integrations save time

- [Integrate chat with email to allow agents to see a customer's chat history.](#) Giving agents the flexibility to see a customer's chat history while utilizing email is another powerful tool for chat agents. This is especially true for agents who are managing more than one chat at a time. The visual indicator of a current chat will save the agent time and frustration in their follow-up communications.
- [Integrate chat with remote support technology to allow agents to seamlessly transition from a chat to a remote support session.](#) The ability to switch instantly to support mode represents the best in responsiveness. Imagine the surprise (and delight) when a chatter realizes your agent can quickly fix the issues they need help with. You'll earn a customer for life.
- [Integrate chat with CRM databases to allow data—including complete chat transcripts—to appear in your CRM database.](#) Metrics are an ever-evolving way to improve products, customer service, and profitability. With chat's increasing popularity, integrating this service into your CRM profiles will give your marketing and development teams more ammunition towards targeting your customers' needs.

5. Monitor and optimize for improvement

- **Utilize customer information to know the client better and serve their exact needs more quickly.** Having access to information like order history and previous interactions will enable quick action and even quicker resolution. Create a default view for agents that includes all the critical information in one place.
- **Monitor agent performance via a supervisor dashboard.** An intuitive supervisor dashboard gives team leaders the opportunity to not only correct, but also to compliment the work their agents are doing. Dashboard metrics can also lead to helpful training insights and new policies that can positively impact your chat operation.



- **Provide agents with continuing education on customer service.** Becoming an excellent agent isn't a one-time training process. Put ongoing training in place on everything from product development and software updates, to how to deal with angry customers. Continued agent education will help ensure every chatter gets a great level of service.



Whether your company has a high demand for live chat or is just getting started, the **BoldChat** team can help you get the most from live chat through planning, training, customization and optimization.

Contact us today to learn how **BoldChat** can improve your live chat operations and customer experience!

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