

An **InstantService** White Paper

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Proactive Chat Best Practices to Energize your Business

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1 ABSTRACT

Congratulations! You've chosen proactive chat as a means to increase sales and customer satisfaction rates, the following best practices help you understand the capabilities of this solution:

- Integrating with web analytics.
- Establishing comparison and control groups.
- Matching behavior to your brand.
- Presenting invitations at the right time.
- Following-up with reactive chat.
- Avoiding the use of chat to gather visitor information.
- Limiting the number of invitations offered.
- Providing time to understand your invitations.
- Applying proactive invitations outside of chat.
- Making changes often.

2 INTRODUCTION

So, you've chosen proactive chat to boost the potential of your website. Great idea! Now you can initiate chat sessions with visitors at critical points while they browse. Businesses around the world have successfully implemented this practice to bring in sales and build customer loyalty.

Now, how do you access the full potential of this amazing chat tool to propel your business into even greater success? Over the last ten years, InstantService has gathered best practices that, if implemented, have an immediate, positive effect on your company's bottom line.

Companies using proactive chat increase sales, average order value, and customer satisfaction:

- *Dymo*—Has seen a 15% decrease in shopping cart abandonment.
- *Golfsmith*—Saved 40 shopping cart abandons within the first three hours of using proactive chat, resulting in over \$25,000 in net new revenue.

- *Ritz Interactive*—Discovered internet customers who chatted were three times more likely to purchase and provided an average order value 40-50% higher than customers who did not chat.
- *REI*—Acknowledges that 58% of their customers chat prior to purchasing.

Applying proactive chat and following these best practices help your business realize similar success.

3 INTEGRATE WITH WEBSITE ANALYTICS

Many companies have strong analytics engines already in place, but they often go underutilized. Use these existing applications to identify problem areas on your website, and then apply proactive chat to the problem areas.

In regards to tracking, proactive chat events are just like any other website event. Take advantage of your existing website analytics designed to report on these events.

Before deploying rules and invitations, integrate the proactive chat events into your website analytics so that proactive offers, acceptances, declines, sessions, and agents can be included in your existing online marketing campaign and conversion reports. Proactive chat events can then be included in reports to measure the effect on bounces, errors, abandonments, customer satisfaction, conversions, and average order values.

Although InstantService provides a very capable visitor and conversion tracking module for implementation within your website code, it is often redundant overhead and cannot match the capabilities of a proper website analytics system, such as Omniture, Coremetrics, WebTrends, and Google Analytics.

4 ESTABLISH A/B COMPARISON AND CONTROL GROUP TESTING

The proactive chat rules contain a segmentation condition that allows you to easily define and target different segments of your visitor audience. For example, you can design a pair of rules with the exact same conditions where Rule A applies to 80% of the visitors, and Rule B applies to the remaining 20%.

Both visitor groups qualify based on the same conditions, this pair of rules compare the effectiveness of two invitation messages and/or designs. You can also use the second visitor group as a control group, registering within your website analytics that the visitors in the group qualified for the conditions but did not receive the invitation, and thus, did not chat. You should see a higher conversion rate and average order value in the first group over the control group.

The segmentation condition is not limited to two groups. You can segment your audience into multiple comparison and control groups by varying the percentages. Comparison testing of proactive chat can also be managed by integrating with your content management system if it has the capability.

5 MATCH THE PROACTIVE MESSAGE TO THE BEHAVIOR AND THE BRAND

It is very important to carefully consider the message and design of your invitations. Ideally, each rule should trigger an invitation related to the visitor's behavior.

For example, a proactive rule can be defined to offer assistance to visitors at *Store.com* after a product search returns zero results. The invitation for this rule should present a clear and pertinent message, such as: "Hi! Would you like help with your search? A *Store.com* product expert is standing by to chat now." This message is understood, trusted, and accepted much more often than a generic message, such as: "Need help? Click here to chat."

By anticipating the visitor's exact need for assistance, you build confidence in the visitor that your *product expert* (not *sales agent*) can actually provide helpful advice

and not waste the visitor's time. The invitation is the next logical course of action for the visitor to take and becomes an integrated part of a positive website experience.

It's also important to match the design and appearance of the invitation with the website. If the offered invitation has a generic look that is inconsistent with the branding of the website, the visitor is less likely to trust it as a service offered by your company.

6 PRESENT YOUR INVITATIONS AT THE RIGHT TIME

Based on your website analytics, you are looking for the *magic moment*. It's that perfect mixture of page positioning and customer intention to buy. It's the best time to encourage your customer, perhaps provide him or her with added incentives to press on to the finish, to the completed sale.

So what should you keep in mind as you're identifying the magic moment?

Rules are often designed with time thresholds that are too short, such as 10 or 20 seconds on the page. This is fine if the visitor has already qualified via other rule conditions, such as arriving at the site via a hot keyword, following a certain click stream, abandoning a process, or experiencing an error.

However, if the only condition is time on-page, it often makes sense to offer the invitation later rather than sooner. For example, offering an invitation when someone is on your billing details page may be a good idea, but 10, 20, or even 30 seconds is much too soon. You likely end up inviting everybody, since most people spend at least a minute reviewing and filling out the form on this page. It would be better to increase the threshold to a higher value, such as 60 or 90 seconds. Consult your website analytics to find out how long visitors usually spend on this page, and then add 20 or 30 seconds to greet those who are taking longer than average and may need assistance.

Offering an invitation too soon can be annoying; distracting visitors while they make a purchase is counter-productive. Invitation placement on your webpage is

also important. Be sure to configure any animation on the invitation so it keeps the form fields clear as your visitor completes them. Allow your customers plenty of time to avoid frustrating them.

7 FOLLOW-UP YOUR PROACTIVE INVITATION WITH A REACTIVE CHAT BUTTON

It's impossible to know exactly when your visitors need assistance, and in these cases, presenting a reactive chat link on your pages in addition to the proactive invitation makes sense.

The decision to offer both proactive chat as well as the reactive chat option depends on your agent resources. If chat volumes expand beyond what your agent resources can handle, it may not be practical to present a reactive chat link on your pages. This may flood your queues with unqualified visitors. In this case, the proactive chat rules qualify your visitors so your agents can focus on the hottest leads.

Additionally, visitors may not be ready to chat when you present a proactive invitation, but they may be ready later in their session. Make sure a reactive chat link is within easy reach when your visitors are ready to chat. Their success at finding the link at the right time alleviates any frustration they may encounter while visiting your site. Their positive view of you increases as they realize you are cognizant of their needs.

To better support this scenario, the reactive chat link can be programmed to only present itself on your pages after a visitor has qualified for a proactive rule. The proactive invitation can present this option with a message such as: "You can chat with us at any time by clicking the Chat Now button in the right sidebar."

This scenario is a win for everyone. The qualified visitors can chat when they like, and the agents remain focused on chatting with your hottest leads.

8 AUTOMATICALLY PASS VISITOR DETAILS TO YOUR AGENTS

Details about your proactively-invited visitor should be automatically passed to your agents. This helps optimize the customer experience in two very specific ways:

- *Avoid post-invitation forms.*

Do not require visitors to complete a pre-chat form once they have accepted the invitation. An invitation is perceived as an immediate offer of assistance. If your visitor clicks an invitation and is then prompted to fill out a form, considerable visitor drop-off occurs before the chat session.

Pass the details about the visitor from their web session automatically, and have your agent request the missing information, if needed. The most important goal in a proactive scenario is to establish communication with the visitor.

- *Avoid requesting visitor information during a chat session.*

Requesting information during a chat session is a waste of time for the visitor and for the agent. Obtain and pass the information automatically from your visitor's web session, so your agents can immediately and intelligently respond to your visitors' needs.

The visitor's current page, product category, cart contents, selected form fields, errors, and similar information are commonly available in the page and can be easily passed. Other details such as the visitor's account number, name, membership level, email address and phone number could also be available in their session. However this may require additional development work.

9 LIMIT THE NUMBER OF INVITATION OFFERS

Limit the number of offered invitations to one or two per browser session. In addition, you should limit the frequency of offered invitations by requiring a few minutes to elapse between them. An invitation offered at the wrong moment is distracting. Offering it again is annoying and can negatively impact your visitor's satisfaction level.

Use a combination of the Invitation Conditions in your rules to control how many times they are offered. For example, the customer has:

- Not previously declined this rule's or any invitation.
- Been offered this rule's or any invitation a certain number of times.
- Not been offered this rule's or any invitation within a certain amount of time.

10 PROVIDE TIME FOR INVITATIONS TO BE READ AND UNDERSTOOD

When designing your invitations, select an option to make the invitation automatically dismiss itself after a specific amount of time. If used, in most cases this threshold should not be less than 20 seconds. The appearance of an invitation can be jarring to a visitor. These visitors may initially ignore the invitation and it may take them a moment to realize its purpose. If you've only allowed 10 or 20 seconds for the invitation to be read, it may fly off the screen just as the customer is about to click it. We recommend showing the invitation for 30 seconds or more.

You can choose to have the invitation persist on the screen until it is accepted or declined, but configuring an auto-dismiss threshold is useful. This would ensure the visitor hasn't left his or her computer and returned after an hour to find your invitation still on their screen. You can sidestep the situation where a visitor accepts the invitation only to find your agents may have logged out for the day or become busy assisting others. An auto-dismiss helps build a visitor's positive impression of your customer service.

11 APPLYING INVITATIONS BEYOND CHAT

Invitations can be configured to take your visitors to any web location when accepted. It does not have to be a chat action. This allows you to use proactive invitations to support promotions and serve customized content based on the visitor's behavior.

For example, you may want to design a rule that simply detects when *Product X* has been added to the cart. You know that when *Product X* is purchased, *Product Y* is a possible cross-sell opportunity, so the rule triggers an invitation permitting your customer to see the product details page for *Product Y*.

12 MAKE CHANGES OFTEN

A fully-optimized, proactive chat campaign takes time to build. Visitor behaviors are difficult to interpret and target and they are always changing. To take full advantage of proactive chat's capabilities, tweak and modify rules on a weekly, daily, or even more frequent basis. Basing adjustments on your website analytics is highly recommended.

13 CONCLUSION

Proactive chat is powerful, and its potential is only limited by your imagination. It brings a new level of interactivity and maturity to your website, and your positive customer relationships set you apart from your competition. It is the personal touch that often makes the difference between losing and making sales.

ABOUT INSTANTSERVICE, INC.

InstantService is a leading software-as-a-service (SaaS) provider of proactive chat and email management solutions. Since 1998, our technology and expertise have increased sales, reduced costs, and improved customer service for companies and contact centers worldwide.