THE DO’S AND DON’TS OF WEB CHAT

with Johan Jacobs
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INTRODUCTION: LET’S CHAT ABOUT CHAT

Web chat is growing quickly as a favored communication channel for customer service and sales. But if it isn’t implemented correctly, failure is just about guaranteed.

Let’s look at four best practices that can lead to successful web chat.

Best Practice #1
COMMIT OR SKIP

Web chat does not lend itself well to pilot projects. if you plan on deploying web chat, you need to commit to the initiative or not do it at all.

Too often, pilot projects are not seen as strategic, and so a low-cost web chat product is used that does not deliver the depth of features required to deliver a great customer experience.

Unfortunately, all too often pilot implementations become permanent, leaving an inadequate web chat platform in place.

Web chat technology will not be your biggest cost. Salaries represent 72% of costs while technology is only 28%, so hiring and paying web chat agents will represent the bulk of costs.

However, costs for a phone interaction are not identical to web chat costs. Typically, the cost for a web chat agent is double that of a phone agent.

Web Chat Agent
= 72% of costs

• Avg. chat duration = 2x phone
• ½ as productive as phone agent
• TCO of web chat higher than phone
Best Practice #2

RUN MULTIPLE SESSIONS FROM DAY ONE

The need to reduce costs for the human side of web chat leads to our second best practice. Prepare your chat agents to manage at least two concurrent web chat sessions from the very first day of operation.

By increasing the number of simultaneous interactions, a web chat agent can become 2-to-3 times as effective as a phone agent.

This means the 72% of human operating costs can become 36% for complex interactions or 24% for simple interactions. The potential savings are huge, making the business case for chat easy to prove.

WEB CHAT BENCHMARKS

<table>
<thead>
<tr>
<th>Simple sessions</th>
<th>Complex sessions</th>
</tr>
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<tbody>
<tr>
<td>6 sessions</td>
<td>4 sessions</td>
</tr>
<tr>
<td>3x as productive as a phone call</td>
<td>2x as productive as a phone call</td>
</tr>
<tr>
<td>1/3 cost of a phone call</td>
<td>1/2 cost of a phone call</td>
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Or so it seems. The reality of meeting the benchmarks is different. There are very few agents who can achieve the benchmarks and still receive good customer satisfaction scores.

It is not impossible to increase the number of simultaneous sessions your agents can handle if you follow our next two best practices.

Best Practice #3

NEVER MAKE A CALL CENTER RESPONSIBLE FOR WEB CHAT

This best practice may seem counter-intuitive. After all, aren’t seasoned agents the perfect resource for implementing chat quickly, achieving the benchmarks and reducing the cost of providing customers with this great new interaction channel?
Quite simply, no for two very good reasons:

1. Call center agents can’t type.
2. They are notoriously poor at structuring well-written responses to customer questions.

A web chat agent needs to type a minimum of 65 words per minute to achieve the levels of productivity and simultaneous chat sessions required.

And because web chat is a written communication channel, agents must have good business writing skills. Poorly structured sentences, acronyms and text message abbreviations are not going to cut it with customers.

The day you start planning the deployment of web chat, start a recruitment and training drive to find agents who have the right skills across reactive and proactive chat.

Look for potential recruits who can demonstrate good typing and writing ability.

Individuals who have taken classes in typing and business writing are good candidates. Make sure they can deliver responses quickly and efficiently, and that the content they produce is well structured and professional in order to properly represent your company.

Give your web chat agents an environment that fits the task. Create separate skill groups where chat agents are separated from agents who talk on the phone.

If you plan to run multiple simultaneous web chat sessions per agent, keep agents dedicated to chat interactions. There is no good place to mix in phone calls to an agent who is expected to manage multiple chats at once.
Best Practice #4

TIGHTLY COUPLE KNOWLEDGE MANAGEMENT WITH WEB CHAT

The critical last element for successfully implementing web chat is to tightly couple your web chat technology with robust and sophisticated knowledge management. Integrated knowledge management is the key to achieving high levels of agent productivity and customer satisfaction with your web chat service.

All knowledge needed to answer customer inquiries must be available to your web chat agents — and not in multiple separate knowledgebases, but as a single, unified knowledge repository in order to streamline the process of finding answers.

TYPES OF KNOWLEDGE

• Corporate knowledge defines company policies and processes
• Agent knowledge provides content used to answer customer questions
• Customer knowledge enables you to identify and target the information to the individual
• Partner knowledge contains content specific to your trading partners and supply chain
• Social knowledge is useful information gathered from social media

Your knowledge solution must deliver sophisticated search capabilities. Google is NOT the type of search you want, as it is too broad, yielding hundreds and thousands of potential answers.

Effective knowledge management delivers only the most highly relevant answers by combining sophisticated search techniques.
The goal is to provide the “single right answer” in order to achieve 80-90% first contact resolution (FCR).

We need to measure the performance of the knowledge used by agents. **Relevance of response should be 85% or more**, and there should never be more than three potential answers served up in response to a question.

Great knowledge management alone will not guarantee productive, successful web chat. It must be **tightly linked with your web chat technology**.

This creates a closed loop system in which agents can quickly discover the most relevant answer, refine it as needed, resolve the customer’s question and update the knowledgebase for continuous improvement.

**SEARCH TECHNIQUES**
- Natural language search understands sentences
- Semantic search understands the different meanings of words and parses multiple questions in a sentence
- Intent-based search looks at behavior to understand the intent behind a question
- Decision trees or case-based reasoning leverage the search engine to ask questions that clarify intent

- Copy & paste
- Review & refine
- Send
- Update knowledgebase
BENEFITS OF LINKED KNOWLEDGE

• Accurate and relevant answers empower agents to handle multiple simultaneous web chat sessions, achieve high rates of FCR and increase customer satisfaction and sales.
• Content is well authored and effectively reflects your brand.
• The same content is used across multiple channels for higher consistency of response.
• Changes to content are easily added to the knowledgebase for organic improvement.

Looking to the Future

LIFE BEYOND WEB CHAT

It is important to note that the “human touch” is lost when your customer is not talking to an agent on the phone or engaging in a one-to-one conversation in a store.

One way to reduce the barrier between you and your customer and re-introduce a stronger human presence into the chat experience is to use video chat.

CONSIDERATIONS FOR VIDEO CHAT

• Agent aesthetics – It’s visual, so video chat agents must reflect the corporate image. Acceptable clothing, grooming and behavior need to be defined.
• Distractions – Keep them to a minimum. It may be necessary to require an unadorned area within the camera range. Moving people are also a distraction, so keep them out of camera range.
• Bandwidth – Video chat requires a lot. You must be able to deliver the bandwidth needed to keep the video chat from breaking up.
THE INTELLIGENT VIRTUAL ASSISTANT

Another option for increasing personalization is virtual agents, which deliver a text or voice interface via a mobile device or online.

Virtual agents can provide a conversational experience without needing to involve a human at all, reducing the cost for customer interactions.

Just like web chat, the ability of your virtual agent to answer customer questions is only as good as your knowledgebase.

Virtual agents must have the same easy, integrated access to knowledge as your agents to ensure relevant, consistent and accurate answers.
WEB CHAT FAQS
with Johan Jacobs
Web CHAT FAQS

Cost and Average Handle Time

What is the cost per web chat?
If best practices are followed, cost per web chat will be around $8-$10.

How does this compare to cost per phone call?
Cost per phone call is $35-$50. Costs for web chat are much lower but the average handle time is greater. This is applicable in all industries for both sales and support because no one can type as quickly as they can speak.

Agent Training and Capacity

Are web chat agents more productive than phone agents?
By running more than two simultaneous chat sessions, web chat agents will absolutely be more productive than phone agents. If running two or less chat sessions, the agents will be equally productive as phone agents.

How many simultaneous chat sessions should each agent have for highest efficiency?
The benchmark for simplistic chat sessions is 6 and for more complicated chat sessions the benchmark is 4. The complexity of these sessions depends on your industry and the support being provided.

What is the difference between simple and complex interactions?
A complex interaction is typically where the agent needs to perform a lot of back end systems activity. For example: financial services, travel booking or medical insurance lookup.

How does this concurrency benchmark affect customer satisfaction?
Concurrency has zero effect on satisfaction as the customer does not know that the agent is also busy with other customers. When doing concurrent web chat sessions, the metric to focus on is “time between chats” which is the time a customer has to wait before they receive a response from the agent. This metric should never exceed 30-45 seconds. If the metric becomes too long, satisfaction drops.
How can one agent handle so many chats at once?
With proper tools and training, along with factors such as the customer typing, the agent should have plenty of time to handle up to 6 simultaneous chat. But be careful that the time between chats never exceeds 30 seconds.

Once web chat is in place, what key metrics should be used to evaluate the agents’ proficiency?
There are only two metrics of importance for web chat agents. First, the productivity metric. Is the agent able to successfully run 4-6 simultaneous chat sessions? Second is the customers’ satisfaction rating of their chat interaction.

Should agents be trained in chat etiquette?
Absolutely. They should also be highly trained in business writing skills.

Can highly trained call representatives who are familiar with processes, client information and knowledge management systems be equipped with written communication skills and work on web chat rather than starting over with specialized agents?
Agents with writing based skills can be redirected to perform web chat. However, agents should not perform a blend of phone activities and web chat activities. The blending of these activities results in poor productivity and high total cost of ownership.

Should agents use emoticons if initiated by the customer?
Emoticons can put some humanity back into an interaction that is otherwise very clinical. However, agents must be very careful that inappropriate emoticons are not accidentally used.

When training agents to use web chat, can you start the agent with one session and gradually increase the number of simultaneous sessions?
If web chat agents are trained in business writing skills, type at least 65 words per minute, and are supported by an integrated knowledgebase, they will easily be able to start training with multiple sessions from day one. If multiple sessions are not run simultaneously when training first
begins, then web chat agents will only be half as productive as phone agents and chat sessions will cost twice what a phone call costs. The total cost of ownership metrics used to rate web chat success will be skewed from the point of implementation and will not support the business case.

Best Practices

With various support levels, should chat be offered in all support models or only in the top tier offering?
Include chat in any support level that deals directly with the customer.

Should agents who are involved with support emails also be involved in web chats? Is it difficult for the agent to switch between answering emails and replying to web chats?
It is appropriate for an agent that is trained in providing service using writing skills to be involved in multiple writing based channels such as email, web chat, knowledgebase authoring, social media, and texting/SMS services. However, if involvement in the other channels causes the agent to only perform one chat at a time, then channel activity should not be mixed. Productivity in web chat is very important.

How can chat be launched as a channel of service without increasing aggregate demand for service?
The goal should be to move people off the expensive channels such as phone to the less expensive channel of web chat. Strong advertising and marketing of your chat facilities are typically all that is needed to encourage people to use web chat. Once the web chat channel is launched and an efficient service is provided, hindrances or blocks to the adoption are rare.

Can a customer be moved from web chat to a phone agent if the complexity of the issue deems it necessary?
This situation happens in about 5%-15% of instances. In these cases, the practice must be for the web chat agent that the customer has been engaging with to phone the customer. Never force the customer to phone into a contact center and explain the issue all over again.
What is the best way of dealing with call requests received via web chat? The best practice is for the already involved web chat agent to make an outbound call to further engage with the customer so the customer does not have to repeat themselves. Never pass the escalation on to a new agent.

**Are blended or mixed contact agents (agents who handle both calls and emails) recommended?**

There is no business case that supports the blending of web chat and phone calls to the same agent. Every single metric talks against this practice because the skills required for the two interactions are completely different. It would be best to establish a separate writing based skills group and have those agents deal with web chat, email knowledgebase authoring, social media and texting/SMS.

**With system generated responses, can the chat be maintained purely by a virtual assistant or does a live agent need to be involved?**

The best scenario is for the customer to first engage with a virtual assistant that is supported by a deep knowledgebase. The virtual assistant will rate all content before delivering an answer to the client. If the answer within the knowledgebase is less than 85% relevant to the question asked by the customer, then the virtual assistant should automatically escalate the session to an assisted service interaction with a live agent. The chat from the live agent should then make its way back into the knowledgebase to be available should the same question be asked.

**Is it better to provide a long answer via chat, push a URL to the customer for more information or to switch channels?**

The customer should never be left to go and search for content themselves. The goal should be first chat resolution similar to first call resolution. However, if there is additional or supporting information then it is acceptable to provide a URL or, even better, to email the content directly to the customer so they have it for future reference.
Does chat work in highly technical environments?
In highly technical environments, web chat is often supported by collaborative browsing technology. This allows the web chat agent to join the customer on their screen and demonstrate or show the customer how to resolve an issue.

Does co-browse improve handle time and first chat resolution?
Co-browse actually increases handing time as more time is spent showing the customer how to resolve the issue. It does however have a huge potential for issue resolution due to the ability to demonstrate step by step solutions. The customer satisfaction often increases when co-browse is used.

Can web chat sessions be recorded and saved for future use?
Yes. This is a commonly recommended practice. All web chat sessions should be recorded, stored against the customer’s interaction history, used for text analytics to find trends, emailed to the customer as a record of the interaction and used for future audit purposes.

Are virtual assistants a recommended practice?
Virtual assistants are fantastic tools to handle large volumes of interactions and a strongly recommended technology to deploy. Best practice is to have the virtual assistant handle the chat session and if the relevance of response metric drops below 85%, the chat is escalated to a live web chat agent.

Can one drive sales through web chat?
Most often web chat supports the shopping basket or the online sales activity where the customer already has an interest. As a cold-sales-call type approach, it is a difficult technology to use to entice someone to a sale.

What percentage of interactions can be reduced with better website design and content access?
Very few. The key to reducing interactions is the ability to provide a single right answer that is 85% or more relevant to the question asked. There is no website technology or content management system that can achieve this. The only tool to do so is knowledge management.
Security

What level of security does web chat offer for sensitive information such as payment or Social Security Numbers?
The best practice is to have the user authenticate themselves by logging onto your transactional website as they normally would. Once logged on and authenticated, then you may securely transfer sensitive information. Secure information should not be handled in a web chat session launched by the client in front of the firewall.

Knowledge Management

How does web chat relate to the knowledge management solution?
Best practice is to buy both knowledge management and web chat solutions from the same vendor in order to get a pre-integrated platform. It can be extremely difficult to seamlessly integrate two separate products. If your current web chat vendor does not have a tightly coupled knowledge product, then change your web chat vendor to someone who does.

If you purchase a knowledge management solution from the same vendor as a web chat solution, will it still be applicable to other channels and relevant to the customer facing knowledge management?
Yes. A well-structured and well-populated knowledgebase that provides relevant answers can be used by call center agents, integrated with web chat, deployed alongside a virtual agent, contain video knowledge, be integrated with social media responses, be integrated with email response management solutions and be deployed on self-service websites. A strong knowledge management solution provides many other benefits as well and is truly the best technology investment any organization can make.
Other Considerations

What is the advantage of video chat if it does not save time or money?
Currently video chat is still an expensive technology that requires specially trained agents working in an office environment specifically developed for video interactions. Video chat is mostly used in unique situations such as the Hertz car hire where video kiosks have replaced people in the actual branches and the booking services have been centralized. Video chat is also used when engaging with high profile, high value clients to allow agents to put a face back in front of the client.

Is there a web chat solution that offers translation services for multiple languages?
There is no web chat product that translates but there are web chat complimentary technologies that intercept the interaction from the customer or from the agent and provide an accurate, on-the-fly translation. These are third party products that need to be purchased, licensed and integrated separately.

What is the difference between proactive chat and static chat?
Proactive chat is set up as business rules on a website that is used to monitor a customer’s behavior. Depending on the business rules, a chat activity would be initiated and pop-up to offer chat to the customer. This is a great tool to encourage specific customers to engage with an agent. Companies should be careful to use proactive chat appropriately to not be seen as a “big brother watching you” or a “hovering sales rep in the store”.

Meet the author

**JOHAN JACOBS**

Johan Jacobs is a former research director with Gartner, Inc. Based on his 13 years of experience, Johan has developed a depth of knowledge about best practices for web chat, including implementation techniques, ROI, required agent skills sets, contact center processes and the impact of knowledge management on agent productivity and customer satisfaction.

**LEARN MORE**

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