

# Live Chat Support Services — Everything You Need to Know



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# Overview

Customer support is crucial to the success of any business. Whether you're looking to resolve customer issues, delight your customers or retain and sell to more customers, support plays a crucial role. Live chat is one of the most engaging and efficient ways to provide customer support.

In this guide, we cover a range of topics relating to live chat support, from the basics to software options and how to set up a world-class live chat operation that delights your customers.

## 1. Why Live Chat Support?

Live chat is quickly becoming the top customer support channel for many companies. It's convenient for customers and highly cost-effective and efficient for companies. There are many benefits to implementing a live chat support channel for your customers.

### Improve Website Visitor Engagement

For most companies, your website is the top channel for your brand, and it has many jobs:

- Explaining the value of your offers
- Guiding prospects to become customers
- Providing answers for customers about your product or offering

Live chat adds a real human element to your site experience, helping you improve engagement with your prospects and customers. Live Chat provides the highest customer satisfaction of any channel.

### Faster Than Email, More Convenient Than Phone

Chat gives your customers the immediacy and live interaction of a phone call with the relaxed convenience of email. During live chats, customers can multi-task without having to wait hours or days on an email response.



### Less Costly Than Phone Support

When compared to phone support, live chat will save you money because:

- Agents can handle multiple contacts at once, reducing staffing requirements — agents can be 4x more efficient
- Chat allows agents to serve customers more quickly with pre-scripted responses — agents become even more efficient
- Good live chat software lets you track previous customer interactions and puts transcripts at agents' fingertips, speeding up resolutions and reducing number of contacts for any single issue

- You don't need expensive phone and data networks, an automatic call distributor or call recording equipment with chat

Chat doesn't require a native accent, only strong written communications, making it easier to outsource worldwide and often save 65% on direct labor costs.

## Drive Sales

Adding live chat support to your website should be priority number one, especially if you're a SaaS, subscription, ecommerce or retail business. With live chat at your side, you can speed up the sales process by providing instant answers to prospect questions, reduce shopping cart abandonment and increase the conversion rates on your landing pages and sign-up pages.

In addition, live chat is a perfect platform for up-selling and cross-selling while customers are actively online. And as an outsourced support provider, we've directly driven 177% ROI through live chat sales.

## Valuable Analytics

Because live chat is a fully digital channel, it provides an opportunity to capture comprehensive visitor tracking and support analytics. Instead of simply providing support, you can gather useful data that helps you improve your business. Actual chat transcripts provide detailed insight into customer behavior.

## 2: Types of Live Chat Support

In general, live chat support of course means engaging in live, written conversations with customers. But you can use live chat in several different ways:

- Proactive Support
- Reactive Support
- "Traditional" Customer Support
- Cross-Selling and Upselling
- Technical Support & Ticket Management

### Proactive Chat Support Invitations

We have all experienced Live Chat in action. When you're browsing a company's site to check out their marketing software tool, but you still have some questions. Then, *ping*.

A friendly support agent starts a chat with you and asks if there's any questions she can answer for you.

You say sure, and you get answers to all of your questions, giving you peace of mind and helping you decide it's time to sign up for a free trial. That's proactive chat support in a nutshell — proactively inviting customers to engage in a chat when the time is right.

With strategic thought and analysis of your specific website user behavior and your offers, you can integrate proactive chat in a way that benefits your customers and your business. To get you thinking, here are some use cases for successful proactive chats:

- Hesitant Shoppers — visitors lingering on sign-up, shopping cart or checkout pages may need help to complete a purchase
- Returning Site Visitors — they're already familiar with your company and may be ready to chat
- Engage visitors before they leave — trigger chats on pages with high bounce and exit rates
- FAQ Page Visitors — these folks clearly have questions; after a certain period of time, proactively starting chats may help you resolve contacts and guide those nearly ready to purchase
- Visitors to "Bottom of Funnel" Pages — people on product pages, case studies and free trial pages are already browsing your offers. this is the time to reach out
- Referral Page Visitors — Driving visitors to specific pages for a campaign? Engage them once they reach your key pages
- Geographic Target Visitors — prospects from certain geographic locations may be exactly who you're trying to reach
- Targeted Leads — certain software lets you track who's on your site, so if the right person from that big target b2b account visits, you can get a notification and reach out

Visitor data allows you to personalize proactive chat invitations, triggering chats either manually by live chat agents or automatically using the software. Key pieces of visitor information can include:

- Geographic location
- Current page
- Referral page
- Time on site
- Visit time of day

Key Don'ts:

- Don't put invitations on every page, repetitively
- Don't start chats too fast – wait more than just a few seconds
- Don't try to start chats multiple times in the same visit if they don't engage on the first try

- Don't be generic or robotic
- Don't offer chat if you have no available agents or there is a long wait time

For more, read this piece from [Comm 100](#).

## Reactive Chat Support Buttons

Imagine going to a gift shop and searching for the perfect trinket. You might see a sales associate in the store, available to help. If and when you want help, you'll seek her out, and the sales associate will help you. That's reactive support. The key is being there and visible when the customer wants a helping hand.

You'll need to strategically plan the placement of live chat buttons to maximize convenience for the website visitor, so they can always engage with you when they're ready. Placing chat buttons and icons in prominent places on your site and apps can also turn would-be phone calls into chats, saving you money as chat is more cost-effective than other channels.

## "Traditional" Customer Support

You've got a customer who has a problem, and needs help. So she reached out to you for a hand with your product. That's what most people think of when they picture customer support. Live chat is well-suited to handling any of the traditional types of support, including:

- Customer Onboarding — helping customers get up and running so they get value from your products and services
- Product Support — from basic password recovery and product education to advanced troubleshooting
- Billing and Account Management — handling sensitive issues of plans, packages, billing due dates, payments, refunds, adjustments
- Customer Retention — processing cancellations, renewals and customer contract extensions
- Better Customer Service Experience



## Cross-Selling and Upselling

Live Chat is the perfect platform to inform existing customers of your other offers or to ask them if they want more of what they already have. In other words, to upsell or cross-sell to them.

For example, if a visitor is browsing a personal software plan and you offer a team plan that's better suited for her needs, you may be able to help her and increase your bottom line at the same time.

The best time to cross-sell or upsell customers is after you've already resolved their issue. In this approach, agents ask questions during chats to uncover key drivers of a customer's success and then subtly turn the conversation toward your offers at the appropriate time.

Satisfied customers who've just had an issue resolved may be ready to extend or renew their plans. And some may benefit greatly from scheduling a separate consultation with your inside sales team to discuss one of your premium offerings.

Depending on how much sales you want to drive, you can turn your whole support center into a profit center —

The process involves several key steps:

- Always resolve the customer's issue first – don't try to push a new product or offering until that is done
- Develop tools that allow the agent clear visibility into what products and services the customer does not already have
- Educate agents on the features and benefits and provide them potential buying clues they can look for
- Create simple to use scripts for qualifying a customer and to pique interest in additional products and service
- Provide tips for agents on how to introduce relevant offers during chats and more importantly how to close on those opportunities
- Identify top sales performers and incorporate their chat transcripts into training and knowledge base

Monitor and coach on selling incorporating sales into your QA process.

## Technical Support

When a customer is having a technical issue, many times the first place they will go to will be your website.



She wants to find the answers and find them quickly. Aside from having a strong online knowledge base, having a technical support agent available to assist will help reinforce the value you place on the customer experience.

Chat is as an effective channel for technical support and may include:

- Multiple tiers of technical support including basic triage, troubleshooting and repair
- Internal and external help desk support
- Self help and assisted knowledge base access
- Warranty claims management
- Remote network services and remote infrastructure support
- Outage management

### 3. Live Chat and Customer Support Software

In this section, we introduce the various types of live chat and support software, cover the key features you'd need and give you an overview of the most popular platforms available today.

#### Overview: Types of Software

In general, customer support software is designed to simplify support by giving you an efficient, centralized way to manage your support contacts — both incoming chats and proactive chats you initiate. But there are many, many options available. Depending on the platform(s) you select, you may select software that incorporates automated chats (chat bots), documentation, customer records, canned (pre-scripted) responses agents can use, transcripts from previous chats and other relevant data.

Here's a brief rundown:

- **Live Chat Software** — standalone live chat software that hook into your website or apps and let your agents chat with customers.
- **Help Desk Apps** — they do it all, bringing everything from phone calls and emails to texts, social media messages and website chats together into one comprehensive command center where agents engage with customers
- **Knowledge Base Tools** — digital repositories of answers to common support contacts about everything from pricing, features and services to frequent problems and more
- **Team Inbox Tools** — lets you bring in emails from multiple addresses to answer your support@company.com and billing@company.com questions together; they usually include advanced features, such as pre-scripted replies to speed up response time

- **Forums** — lets users engage with each other, similar to communities like WordPress' user-to-user support

What's under the hood of these software tools? Here are the different features you might want:

- Simple ability to chat one-on-one with visitors to your site
- Easily gather user feedback
- Handle multiple chats at once
- Support outside the browser with native desktop apps
- Support bug tracking and documentation
- In-app support
- Integration of a large team on a budget (think 50+ agents)
- Self-hosted support
- Full-featured integration of all support channels in one platform
- Integration of customer records, previous transcripts
- User visitor data
- Integration with your knowledge base
- Scalability — can you upgrade for more features and integrate more users
- General ease of use



## Chat and Help Desk Software at a Glance

Here's a look at some of the popular chat and help desk software options available today, and some of the key features they provide (at the time we wrote this article). This is not by any means a comprehensive list.

### ZenDesk — team inbox, knowledge base, social, chat, phone, forum



- **Omni-channel** — support for chat, email, SMS (texts), CRMs (think Salesforce), forms, and other data-related tools
- **Custom-add-ons** — you can build your own apps and extensions

- **Knowledge base integration** — when customers ask questions via Zendesk's chat on your site, it populates relevant documentation which often eliminates contacts by helping customers help themselves
- **Surveys** — includes a Net Promoter Score (NPS) survey at the bottom of messages

## Zoho — CRM, social media, support and much more



- Absolute all-in-one software and one of the cheapest to get started
- Office files
- CRM
- Accounting
- One account for all of the Zoho apps
- By signing in with a Zoho account, you can set up a support center with email, documentation, and a user forum, and bring in as many of your teammates as you need to manage support.

## Freshdesk — team inbox, social, chat, phone



- Omni-channel support
- Built-in service level agreement (SLA) policies to help prioritize support contacts across channels
- Marks tickets as increasingly important based on how long they've waited
- Doesn't turn everything into an email — e.g. Facebook messages are handled on a dedicated Facebook Page tab
- Sends push notifications to mobile app users when you respond
- Real-time live chat support

## UserVoice — team inbox, knowledge base, mobile support, forum



- Combines project management, customer support and a forum in one app
- Great for providing feedback to direct product development
- Customers can send in new public ideas or private messages, and your team can answer them all from one combined dashboard.
- Integrations with internet phone systems, CRMs, social networks and more
- Integrates support with project management queue

### Kayako — team inbox, knowledge base, chat, phone

- Offers native apps for almost every device — mobile iOS, Android, Windows Phone, and Blackberry, along with desktop app for Windows PCs and Macs
- Integrates emails, calls and live chats
- Includes an advanced knowledge base supporting articles, tutorials, troubleshooting guides and news
- Automatically searches through knowledge base before letting users send emails
- Presents agents with individual customer's chats, emails, billing, logs and more together whenever they start a contact



### Hubspot — team inbox, knowledge base, chat, phone

- All the tools you need to run complete inbound marketing campaigns.
- A full suite of sales tools for your whole team to shorten deal cycles and increase close rates.
- Creates a unified library, accessible to your whole team.
- When a lead clicks an email link to open your document, or shares it with a colleague, you are instantly notified on your desktop.
- See how often your team is using different pieces of content, and how your prospects are engaging with it.
- Live Chat Support



### HappyFox — team inbox, knowledge base, social, chat, phone, mobile support, forum

- Time tracking inside the team inbox — see how long each email takes to answer
- Billing for priority support
- Imports existing support tickets from Zendesk and Desk
- Lets you export reports with contacts, tickets and more in spreadsheet formats.
- Mobile framework accommodates other support apps



### LiveAgent — team inbox, knowledge base, chat, social, forum

- Pulls every interaction agents have ever had with a customer into one chat-style thread with previous emails, chats and more.



- Live chat widget for websites
- SLAs to ensure on-time support for top customers.
- Lets support team members set their schedules and keep new tickets from coming into their queue while they're away — great for remote support teams

### **Reamaze — team inbox, knowledge base, chat, social, mobile support**



- In-app support — .builds help docs in Reamaze and allows embedding into your website or app, alongside Reamaze's chat widget.
- Customer history and interactions included inside your app and in their chat widget,
- Monitors an email address or social accounts for help messages and brings everything together for in one place

### **Deskero — team inbox, knowledge base, social, chat**



- Monitors social networks right alongside your support requests
- Pulls in any support requests you receive from LinkedIn, Twitter and Facebook and monitors each network for keyword mentions
- Helps you find people who need your tool and see what competitors are up to
- Provides previews for entire support messages and replies in the dashboard, without requiring agents to jump back and forth between screens.
- XML exports for data — portable to other support apps

### **UserEcho — team inbox, knowledge base, forum, social, chat**



- Forum-focused support tool
- Lets users ask for new features, add comments and thoughts about them, and upvote their favorite ideas.
- New comments and votes show up in your email support queue, along with the rest of your support emails
- Helps you prioritize the most important new features for your development roadmap

### **Desk — team inbox, knowledge base, social, chat, phone**



- Lets agents easily switch between multiple tickets and chats with convenient tabs
- Provides all user data on customers while they're on the chat with agents

- Part of the Salesforce family of apps – shows CRM data alongside tickets if you're a Salesforce user and logs support contacts back to a Salesforce CRM profile.
- Integrates Salesforce's reporting tools in Desk

### Intercom — team inbox, chat, social



- Provides detailed filters and customer profiles to help find highly specific tickets, such as purchases from two years ago
- Watches customer interactions with your website, tracks pages visited, when a trial is started, whether a pricing page is viewed, or other engagements
- Great for proactive support — enables in-app chat with users to proactively answer questions before a purchase,
- Integrates email and social media as well as chat
- Lets agents jump between emails quickly
- Displays each contact's full profile—including the last time they visited your site, the number of times they've used your app and other user data
- Sends automated emails and marketing materials to keep customers engaged



## 4. Live Chat Operations

In this section, we cover the key operational components of a great chat support organization, including:

- Hours of operation
- Staffing levels and workforce management
- Staffing teams: in-house vs. outsourced
- Training
- Documentation

## Hours of Operation

In the ideal world, everyone would offer 24/7 coverage but for many companies it is not economically feasible or in some cases needed. When setting up your support operation start by examining who is your customer and where do they live. If your business is primarily a regional player supporting businesses that operate during normal business hours, staffing during that time may be all that you need. If your customers are spread across multiple time zones, consider where there is the most crossover and start to build schedules from there.

When to expand hours of operation? Whatever hours of operation you choose, it is important to track volume by interval to identify peak times. This includes tracking volume and activity when support staff is not available. If you begin to expand your footprint across multiple time zones and your product or service become mission critical for the customer, that is when expanded hours of coverage may become a higher priority.

## Staffing Levels and Workforce Management

Contact centers strive to provide the best possible support, drive the most sales and build the happiest team with the fewest necessary agents. It's all about efficiency. At a minimum, you always need two people, so one can cover for the other while they go on breaks. Then, depending on your hours, you'll need more agents. For example, if you offer 24/7 support, that's a full three 8-hour shifts. At a minimum of two agents working at any given time, you now need six agents minimum. Depending upon how many contacts you expect during peak service hours, you may need additional staff to achieve the desired service level for customers. Staffing the optimal number of agents can get very complex.

Historical patterns are the best way to predict future patterns, including peaks and valleys during the day. One can use a simple spreadsheet to develop an hourly forecast and by understanding a few key variables begin to estimate staffing needs by half hour.

**Erlang C** is a traffic modeling formula used in call center scheduling to calculate delays or predict waiting times for callers. **Erlang C** bases its formula on three factors: the number of reps providing service; the number of callers waiting; and the average amount of time it takes to serve each caller. There are free online calculators that utilize **Erlang C** that can be used as a starting point for developing schedules. Read more about [Workforce Management Basics](#).

## Training

Training is absolutely crucial to a strong support operation. Agents need to become experts in your company, products and policies. They need to have great people skills, exhibit strong communication,

be patient and have a desire to serve with empathy.

They need to be able to understand the culture of your customers — this comes into play when outsourcing with an offshore partner. Ensure your partner has strong cultural training programs in place.

For chat support channels, strong written communication is required along with the ability to multi-task. Training should incorporate listening techniques specifically for chat. If you are working with a near shore or offshore partner confirm they have ESL (English as a Second Language Training) in place. There are so many subtle differences in the use of the English language, mastering inferences and analogies takes practice.

## Documentation & Knowledge Base

The goal of a great knowledge base and documentation is to help your customers help themselves while decreasing the number of unnecessary customer chats and contacts you receive — saving you money. You want to turn your customers from novices into experts on your products.

A knowledge base is a central library of FAQs, tutorials on using your products, login and password recovery steps and simply a collection of useful information on anything and everything that helps your customers use your products.

Use cases:

- A great knowledge base helps customers help themselves, making them more confident and self-reliant in their use of your product as well as reducing contacts
- It also helps your support team, as they can quickly pull resources while they're on chats with customers and even share those resources directly with them

Best practices:

- Explain every detail you possibly can in documentation — if there's any ambiguity, it may lead to more customer contacts
- Go through using your products step-by-step, chronologically, so it's easy for your customers to follow along
- Use video, pictures, GIFs — any multimedia is good
- Maintain on-brand wording, tone and voice of your knowledge base — this is public-facing communication and will be a major way your customers interact with you
- Reuse and link together various articles and video pages instead of writing out the same explanations again and again



- Get your documentation out there wherever your customers will be — both on your site and off your site
- Make the knowledge base clearly accessible on your site under “Support,” “Help,” or “Contact” — follow conventions customers know
- Add a search box on the top right of your website allowing customers to search your knowledge base
- Integrate your knowledge base into live chats — many of the software programs we profiled above make this easy (it’s essentially a “chatbot”)
- Continuously add to your knowledge base as new issues arise, making it better and better

For more on documentation, check out [Zapier’s Complete Guide](#) on the subject.

## 5. Live Chat Operational Metrics

In this section, we give you a brief overview of the key metrics to consider when you set up your chat operation. For a deep dive into customer support metrics and how to use them to continuously improve your customer support, see [The Ultimate Guide to Customer Support Metrics](#).

### Wait Time

The average length of time customers who start chats wait before being connected with an agent.

*Total length of time all customers wait before connecting with an agent/ Total number of calls = Average call wait time*

### Service Level

Service level describes the measurable services you provide customers in a given time period — for example you may want 80% of incoming chats to be answered within 60 seconds. Service level is a leading indicator for measuring the customer experience.

The basic formula is

*Service Level = total chats answered within threshold/(total chats answered + total chats abandoned) x100*

### Abandonment Rate

The number of customers who close their chat before being connected with an agent. This is calculated as:

*Abandonment Rate = (Number of customers who abandon chats up before connecting with an agent/Total number of chats) X100*

## Average Handle Time

The total average duration of a single interaction, including wait time, chat time and the follow-up or related admin tasks.

*AHT = (Total talk time + Total hold time + Total post-call work time)/Number of support conversations*

## Concurrency

Concurrency tells us how many chats agents are handling at the same time.

## Customer Satisfaction (CSAT)

The customer satisfaction score indicates how satisfied your current customers are with your product or service.

It can be measured a variety of ways, but the most common is a transactional rating after contacting support. You might pose the following question:

"How would you rate your recent experience with our help desk?" with the options: "Bad" or "Good".

$CSAT\% = \text{Number of "Good" responses} / \text{Total number of surveys received} \times 100$

## Net Promoter Score (NPS)

NPS is, broadly speaking, the likelihood your customers would recommend you to people they know.

Ask your customers how likely they are to recommend your product or company to someone else, on a scale of 0-10. Scores between 0-6 are detractors, 7-8 are neutral, and 9-10 are promoters. Calculate your NPS by finding out the percentage of promoters minus the percentage of detractors. The higher the NPS the better.

$NPS = \% \text{ promoters} - \% \text{ detractors}$

(NPS scores are a number between -100 and 100.)

## Customer Effort Score (CES)

CES measure how much effort your customers have to put in to have their requests handled.

For example, you can ask them “How easy was it to get your issue completely resolved?” Answers could be on a scale of 1-5 or 1-7, ranging from “Very easy” to “Very difficult.” Or, you can ask customers to what degree they agree with the following statement: “You made it easy for me to resolve my challenge” on a scale of 1-5 or 1-7.

Their score (or average score) is your CES. Calculate total CES by finding the average of all your customer scores:

$$\text{CES} = \frac{\text{All customer effort scores}}{\text{Number of customers who responded}}$$

## More Metrics

This is just a sampling of customer support metrics. For more information on metrics and how to strategically implement the right ones in your operation, we recommend seeing our complete white paper: [\*\*The Ultimate Guide to Customer Support Metrics.\*\*](#)



# About GlowTouch

GlowTouch LLC provides personalized contact center, business processing, and technology outsourcing solutions to clients around the world. Founded in 2002, its 2,300+ employees deliver operational excellence with high-touch engagement. A certified Woman-Owned Business and six-time Inc. 5000 honoree, GlowTouch is headquartered in Louisville, KY, with additional locations in Mangalore, Bangalore, & Mysore, India, and Santo Domingo, Dominican Republic.

To learn more about GlowTouch, visit [www.GlowTouch.com](http://www.GlowTouch.com).