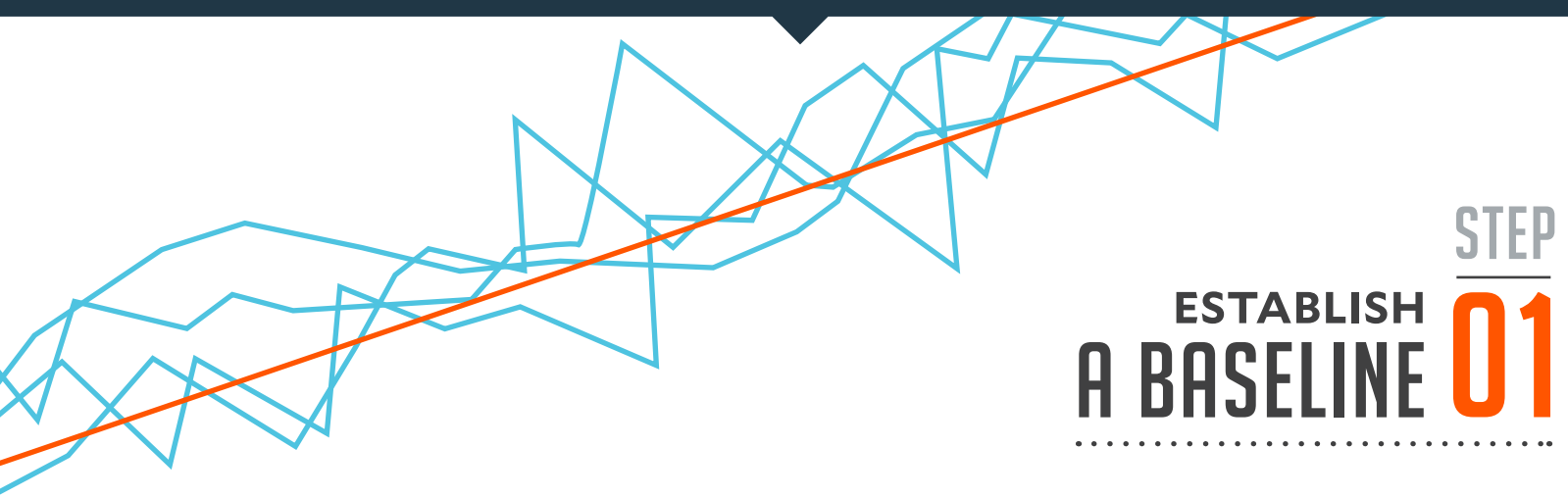


TEN STEPS TO REAP THE REWARDS of CHAT SUPPORT

Study after study confirms that chat is both a cost effective and customer friendly support channel. However, many organizations haven't yet implemented chat or are still relying on email and phone as primary support channels. Moving to chat can be a daunting task, and too many organizations add chat as a support channel without proper planning. Inevitably, the full benefits of chat are never realized and customers refuse to embrace the new channel.

There are a number of actions a support organization can take to ensure the success of a new chat channel. The following steps can help you put the right people, processes and technology in place to successfully launch and gain value from chat support.



STEP ESTABLISH A BASELINE **01**

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Establishing a baseline of your key service performance metrics before you implement chat is critical. This baseline will be used to truly understand the impact of the chat support channel on your performance metrics. Be sure to track these metrics by channel. Some metrics to track are:

- ▶ Volume by channel
- ▶ Service level
- ▶ Abandon rate
- ▶ Overall workload
- ▶ Handle time
- ▶ Agent productivity
- ▶ Time to resolve tickets by issue
- ▶ Overall resolution rate
- ▶ First contact resolution
- ▶ Customer satisfaction

STEP

02 IDENTIFY IDEAL ISSUE TYPES FOR CHAT



Review types of issues and identify how the features of chat could hurt or improve efficiency and resolution times for your customers. For starters, consider the following:

- ▶ Take advantage of concurrent sessions. Common issues with repeatable steps or issues that require downtime, such as waiting for something to download, are ideal for chat. Here, agents are able to handle multiple chats at once, which drives greater efficiency.
- ▶ Drive sessions that will likely require full remote control. If your chat solution is integrated with remote support technology, it's wise to drive issues that will require remote control to chat because agents will be able to easily elevate the chat to a full remote control session without requiring the customer to switch to another support channel. This practice speeds up resolution times, improves first contact resolutions and leads to happier customers.

STEP

PROMOTE CHAT IN THE RIGHT PLACES 03

The "if you build it, they will come" strategy might have worked for Kevin Costner, but it's a flawed plan for implementing a new support channel. Creating a communications plan that will drive ideal customer behavior is crucial. Most support organizations are concerned with what percentage and type of tickets will come through chat, but fail to recognize that how chat is promoted has a direct impact on usage. Consider these strategies:

- ▶ **If you only want specific issue types coming through chat:**
 - Only add chat links to knowledge base (KB) articles related to the selected issues
 - Provide customers with a chart of each issue type's preferred channel for fast resolution
 - Based on a customer's issue type selection, show your preferred channels as the only option to request support
- ▶ **If you're more comfortable with chat and want to drive most of your volume through chat:**
 - List chat as the first contact channel on your services page
 - Include chat links on all KB articles
 - Add a message to your IVR that drives customers to chat
 - Add a chat link to your email signatures



STEP

04 DETERMINE OPTIMAL STAFFING LEVELS



This is one of the most overlooked steps of implementing chat, even though proper staffing is critical to overall performance. If the chat channel is understaffed, long wait times will drive customers to seek help elsewhere. Making matters worse, these customers will likely never return to chat. If chat is overstaffed, your other channels will be negatively impacted. The best practice is to make sure your service levels for chat are consistent with your phone service levels or else customers will flood whichever channel provides the fastest service.

By consulting your communications plan (see step #3), you can get an idea for the amount of volume that will come through chat and staff accordingly. When building your staffing model, keep the following in mind:

- ▶ Account for concurrent sessions in chat. If an agent works a chat that takes 10 minutes, but 5 minutes into the chat, takes another chat that takes 10 minutes, reporting will likely show that a chat takes 10 minutes. However, for staffing purposes, you only want to consider the total time worked divided by the number of chats handled. For the example we just discussed, you would want to use 7.5 minutes for your average chat handling time (15 total minutes worked / 2 chats).
- ▶ Separate your staff into chat or phone agents. Phone and chat require very different skill sets. Plus, to get the most out of chat, you want your reps to be focused on chat. Allowing chat agents to take concurrent chat sessions and to work web tickets or email during down time will drive greater efficiency.



STEP

ASSESS WHO SHOULD STAFF CHAT 05

Don't fall for the common fallacy that your top phone agents will become your top chat agents. While chat and phone require the same service mindset, chat requires a unique set of skills, like typing and multitasking, that aren't required for phone support. Develop a chat and phone skills matrix to rank your agents for each channel. Agents who perform well with chat typically test well for typing speed, accuracy and grammar and are process oriented.

STEP

06 CREATE CANNED MESSAGES



Personalization goes a long way in chat, but when it comes to commonly repeated messages, building canned messages saves time and drives greater efficiency. This will allow agents to quickly select a canned message, instead of typing out the same phrase over and over. Consider building canned messages for:

- ▶ Greetings
- ▶ Standard troubleshooting questions
- ▶ Process steps
- ▶ Closings

STEP

ESTABLISH NEW PROCESSES & TRAIN 07

Another common pitfall is applying the same standard phone processes to chat. Because these are fundamentally different channels, each needs its own processes and training. Consider the following when outlining processes for chat:

- ▶ Take advantage of intelligent routing with your chat entry point. Based on what issue the customer selects, route chats directly to the rep or team that has the skillset to resolve the issue. This practice can cut out a triage step, improve first contact resolution time, and decrease issue resolution time.
- ▶ Identify how long an agent should wait for a response from a customer and what actions an agent should take when the customer is unresponsive past the time allowed. Such an action could be a polite warning message followed by a closing message that asks the customer to contact support again if the issue persists.
- ▶ Outline how and when an agent should use canned messages as well as when a customized response is required.



STEP

08 INTEGRATE WITH OTHER SYSTEMS



Integrating chat into your existing service desk environment creates a seamless support experience, which drives a better customer experience with reduced tech effort. It's a win-win. Below are two of several points of integration for chat.

► **Your Remote Support Software.** Giving reps the ability to escalate a chat session into a full remote support session enables faster resolution during the first contact and a better customer experience. Make sure your remote support software provides the proper controls to limit access when appropriate.

► **Your Ticketing System.** An integration between your chat tool and your ticketing system can save your reps a substantial amount of time. Typical integrations will automatically update the service ticket with the chat log and all of the details of the session. This is a huge advantage of chat over phone.

STEP

MEASURE CRITICAL KPI'S & REVIEW REPORTING 09



As with phone support, you need reporting that enables you to identify trends and take corrective measures as you grow the chat support channel.

Revisit your baseline metrics, ensure all metrics are tracked properly and incorporate any new metrics by channel. Consider analyzing customer satisfaction scores, resolution rates, productivity, service levels, and handle times.

STEP

10 CONTINUOUSLY IMPROVE

Continuously track your post chat launch performance against your baseline. Also, analyze your performance across channels and review customer survey data. Be sure to dive into the details and analyze performance by issue type, by agent and by customers to find ways to drive improvement. Maintain a continuous feedback loop with the frontline agents through a pre-defined feedback mechanism. A regular meeting, post session rep survey, or email address where agents can send recommendations helps to keep the improvement conversation front and center.



Following these steps will position your support organization to realize the full potential of chat as a support channel, which will drive an increase in customer satisfaction and a reduction in costs. That's certainly something to talk, or chat, about.



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