The modern guide for
chat support

freshdesk
by freshworks

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We live in an age of instant gratification.

Instant food.
Instant answers.
Instant communication.

This desire for immediacy makes new-age tools like chatbots or chat support more attractive than ever before to both customers and businesses.

For one, chatbots deliver a quick, convenient and easy way for customers to speak to someone at your business directly from a messenger-like tool on your website.

This enables customers to engage with you while simultaneously gaining a personal experience with your business.

Fortunately, the benefits of chat support are many (more about that in a minute.) And the results are outstanding for businesses and consumers alike.

In fact, a Facebook study shows that *53% of customers* are more likely to buy from a business they can reach through live chat.

So if you don't already have a chat support feature on your site, you could be missing out on a powerful tool that can help your business in many ways.

Before you give the green light on implementing chat support for your business, you should understand how and if it can benefit you.

Here are the most common advantages small businesses see when they use this tool effectively.

Chapter I:

Understanding how chat support can benefit your business

Delivers heightened customer service

With competitors waiting to swoop customers out from under you, customer service is more a differentiating factor today than ever before. Often the quality of your service can be reason enough for customers to choose you over your competition or vice versa.

> **"67% businesses believe that chatbots will outperform mobile apps in next 5 years"**

So how do you take the lead on satisfying your customers when it comes to support?

Some businesses try to slash their call wait times. But the truth is, customers don't want to call you and be put on hold any more than you want them to. And they don't want to have to email you, either.

Plus, call centers are pricey, costing you dollars for hardware, phone lines, staff and more. In short, this option is a no-win for both you and your customers, which means you'll need to focus on something else to increase satisfaction scores.

The best way to do that is to think like a customer and consider how they'd prefer to communicate with you.

Enter chatbots.

A quick, convenient, easy tool, chatbots have gained popularity with customers. And if used effectively, they can help amp up your customer service game and boost client satisfaction.

One of their best features is the speed and convenience they offer customers in enabling them to get in touch with you when they need. Most chatbots appear directly on the page the customer is visiting on your website, so accessing them is as easy as clicking a button.

They also eliminate hassle.

Say for example a customer is looking for an answer to a simple question. Without chatbots, they'd have to pick up the phone or spend time filling out an online form to get in touch with someone.

But chat support eliminates the hassle and inconvenience of them ever having to leave one place (the page they're currently on) and use another channel (the phone/a different page on your site to access your contact form) to reach you.

Instead, a simple click lets them talk to someone within seconds and get the information they need without ever having to navigate away.

To top it off, chat support is much more cost effective than running a call center. On average, businesses that use live chat save *nearly 50% or more on support costs* than when they use other support channels.

It used to be that chatbots were limited in function, used solely to offering customer service. But over the years, they've evolved to boast many more benefits that can really help give your business a hefty boost.

Supports marketing efforts

Marketing is one of the most important responsibilities you'll undertake for your business. After all, it's what creates awareness of your brand and helps get people through the door.

But marketing shouldn't be the end all and be all of your sales strategy. Because once those customers start trickling in, you'll want them to do something more than just pop in to pay you a visit.

For instance, you'll want them to subscribe to your newsletter or sign up for a demo of your latest product.

You'll want them to take action.

Sadly, more often than not, while marketing efforts are effective in getting clients in the door, they're not so effective in driving them into action.

Once they're on your site, many of your visitors won't subscribe, or buy or do anything at all that would prove of benefit to your business.

Usually, they'll take a few moments to browse around and then leave, putting all those marketing efforts and dollars to waste.

One way to encourage them to act once they finally make it to your site is by offering chat support. This tool helps transition customers away from simply browsing to actually engaging with your business how you want them to and in real time.

What's more is that customers appreciate this real-time support. In fact, *42% of customers* prefer to communicate through online chat than other avenues.

That's because chatbots offer a benefit emails, online forms, and phone calls don't: instantaneous help.

This immediacy alleviates the frustrations that follow when customers find themselves on standby for customer support.

Plus it lets you build rapport with them while they're browsing and, in turn, helps them feel more confident in your business and offerings.

These benefits combined put your customers at ease and make them more likely to sign up for that free trial or complimentary demo with less effort required from you.
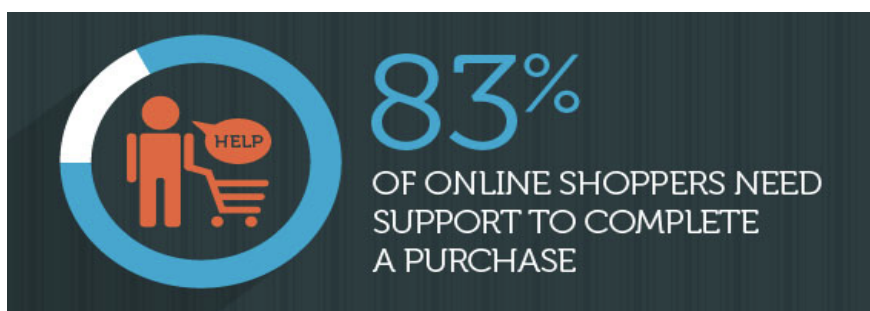

Plus, it keeps potential customers from vanishing into thin air and leaving you with nothing to show for the efforts you put into getting them on your site in the first place.

Improves your page rankings

Most businesses can only dream of making it to the top of search engine results on sites like Google. If that's one of your goals, chatbots can be a lifesaver.

You probably already know that search engines rank sites based on how well they perform against set algorithms.

One of the components these algorithms factor in is how long visitors actually stay or dwell on your site once they arrive. Naturally, the longer they're there, the better your site performs on search engine results.
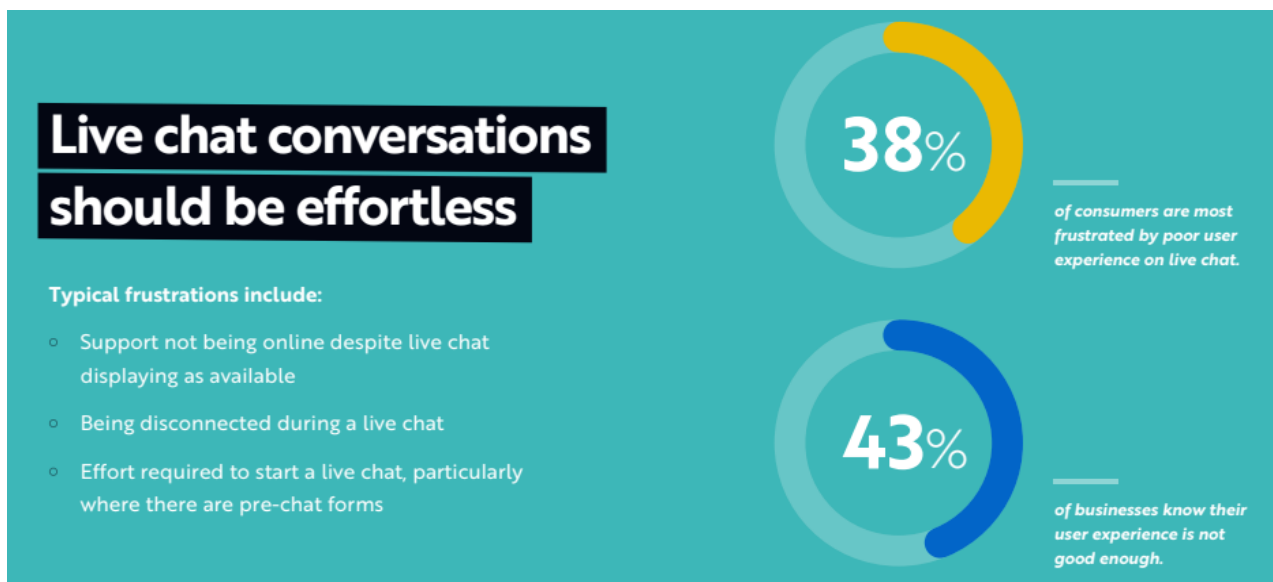
But where do chatbots factor into the mix?

They're a great distraction to help keep people on your site longer, which can make search engine algorithms work in your favor.

For instance, if a customer visits your site, but doesn't have any reason to linger for long, they'll probably just browse for a few moments and then click out or visit a different site.

If this happens repeatedly time and time again with multiple visitors, your site's average dwell time will fall, making search engines believe it doesn't house much in the way of valuable information.

As a result, the sites that keep people on longer will be perceived to have useful information and float to the top of results, pushing you further down and less likely to ever be discovered.

Chatbots help dwell time because they act like a virtual host or salesperson on your site, greeting customers, offering answers to questions and helping them buy, which increases visitor stay time.

And this factor can manipulate algorithms to work in your favor and inch you higher up on search results.

The more visible you are on results, the more likely that viewers will actually click on your site. And the more people click, the longer you'll remain in top position on search pages.

Increases sales

Of course, no business is worth its salt without sales to keep its doors propped open. Fortunately, this is yet another area where chat support can lend a helping hand.

According to one study, approximately 53% of people who visit your site are more likely to do business with you once they have a chance to speak with you.

To top it off, they're also likely to pay *more than 10% more for your products and services* than when they visit a business they aren't able to interact with.

'77% of customers won't make a purchase if there is no live chat support'

But how do chatbots drive sales? Because they give customers a chance to feel comfortable, be persuaded, gain clarification and be put at ease so they can purchase with confidence.

Alternatively, without chat service, customers are more likely to walk away, either because they're not completely sold on your offerings or because they weren't successful in finding an answer that would have otherwise helped seal the deal.

And once they leave, the chances of them returning are slim.

Even more painful would be to know that they were driven into the arms of a competitor that was able to offer them what they were looking for: answers, service, and attention.

This brings us to another key reason why chat support might be an option worth considering.

Differentiates you from competitors

Ideally, you want to be the business customers flee to from your competitors when they're not able to deliver on the fast, convenient customer support clients desire.

Say that's exactly what happens. A customer who's just left a competitor site visits yours and the first thing they see is your chat support box. Already you're paces ahead of the game.

Because now you're optimizing on an important component of business that can help you rise above the rest: differentiation.

Customers love different when different is good. Especially when it makes their lives easier.

Truthfully, many businesses still haven't implemented live chat, which means that offering this resource on your site can distinguish you from many of your competitors.

But how does this differentiation work in your favor?

For one, it showcases you as a leader in innovation, positioning you as someone on the cutting edge of technology who's ahead of the pack. And people appreciate doing business with the leader.

Chat support can also make customers perceive you as a business that cares for and invests in their convenience. Because although it's affordable, chat support still comes at a cost.

And when your competitors aren't doing the same, naturally you'll appear a rung above the rest.

Live chat can personalize customer support

52%

of consumers are likely to switch brands if a company doesn't make an effort to personalize communications with them.

Source: https://blog.zingtree.com/the-most-important-customer-support-stats-for-2018/

Also, chat support gives you the unique ability to make first impressions with clients and form relationships and connections with them.

This initial interaction is an opportunity to showcase your brand personality.

Together, these elements can help increase customers' confidence in you and, in turn, your products, services, and offerings.

Chapter II:

Finding out if it's right for you

We know now the several benefits chat support offers, but you still need to make sure it makes sense for you before you invest in it.

Here are a couple of questions you should ask yourself before committing.

Do I have enough traffic?

If you're only seeing a handful of customers on your site every now and then, chat support probably isn't ideal for you just yet.

Implementing this service on your site comes at a cost, and ideally your traffic should help cover that cost to justify the investment.

Although that might not be the case right now, you can continue to monitor site volumes to see if it becomes a more feasible option for you in the future.

If on the other hand you have lots of site traffic and receive several contact requests through online forms, phone, etc., your business is probably ready to test out the benefits of chat support.

Do I have enough resources?

If you have enough traffic to warrant chat support, the next thing you want to think about is whether you have the resources to effectively manage chat support. If you don't, you'll want to ask yourself whether or not your business can afford to hire help for this initiative.

Staffing enough people is important to maintaining an effective chat support strategy. Because chat support is more instantaneous and runs at a faster pace, you may even need to hire several individuals to make sure you're able to handle volumes effectively.

Unfortunately when it comes to live chat, customers aren't very patient about waiting around for someone to pop in and help.

The good news is, unlike with phone, your chat support staff can handle multiple chat conversations at once. So you likely won't need to hire as much staff as you would to manage a call center.

Do I have enough money?

The good news is, chat support software is very inexpensive. It can cost anywhere from about $15 to hundreds of dollars a month depending on which services and features you sign up for.

For instance, you could opt to have canned responses (more on this later), get transcripts of chats, and get data and analytics to track your volume and find out where customers are located.

The options you can choose from are plenty, but the important thing is to make sure you have the right budget and can commit to it.

Chapter III:

Best practices for delivering exceptional chat support

Once you have a clear understanding of the benefits chat support provides and how to make sure it's a good fit for you, it's time to move on to the next most important factor: delivery.

Here are some guidelines to keep in mind to make sure you're making the most of your chat customer support efforts.

Predicted Use Cases for Chatbots
What do you predict you would use a chatbot for?

Use Case	Percentage
Getting a quick answer in an emergency	37%
Resolving a complaint or problem	35%
Getting detailed answers or explanations	35%
Finding a human customer service assistant	34%
Making a reservation (e.g. restaurant or hotel)	33%
Paying a bill	29%
Buying a basic item	27%
Getting ideas and inspiration for purchases	22%
Adding yourself to a mailing list or news service	22%
Communicating with multiple brands using one program	18%
(none of these things)	14%
Buying an expensive item	13%

Set guidelines

Before you or anyone gets started handling your chat support, it's integral to step back and set some clear guidelines so that no matter who's managing clients, your approach is consistent.

For instance, how long is it acceptable for a customer to wait around before they're greeted? Three seconds? Five?

Another thing you'll want to decide on are your chat support hours of operation. For instance, will you be available around the clock to clients? Or just during certain hours of the day? And on which time zone will you be operating?

You should also outline clear workflows.

For example, which factors will determine whether a *ticket is escalated?* When it is, who should it be escalated to? How will an agent be assigned to the task? How will resolution be monitored?

These are important details everyone on the team, including chat agents, should be aware of so everyone is operating in sync and within the right expectations.
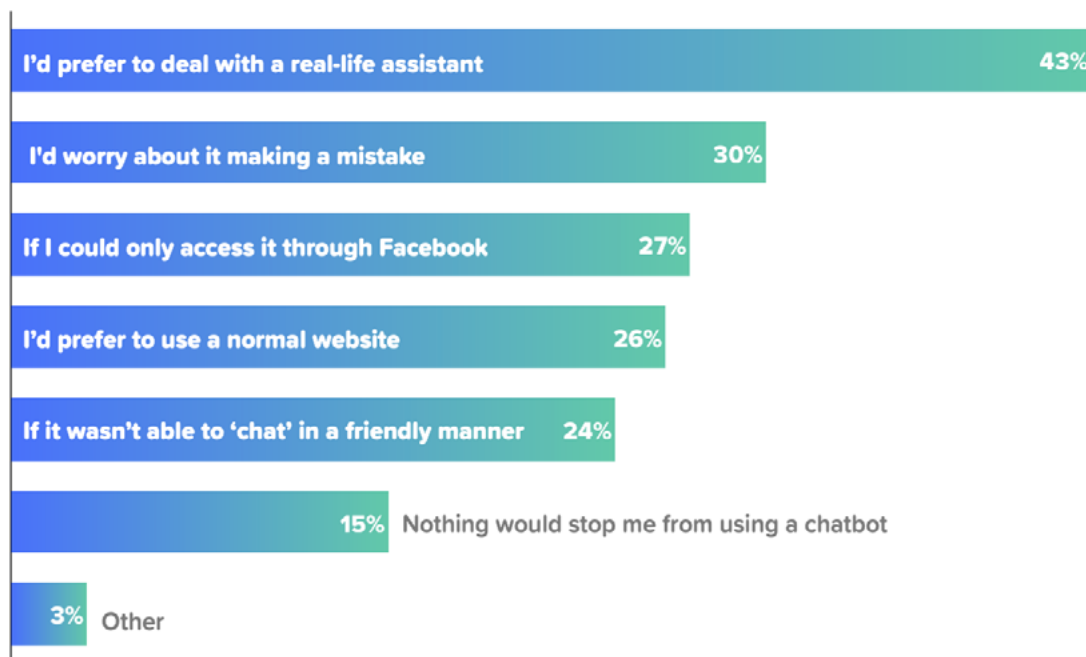
Finally, think about what you want to sound like when you're talking to clients? Cheerful? Happy? Conversational? Straightforward?

This will determine the voice of your brand and make your business distinctly you.

For instance, if your target audience is tech geeks, you might use technical jargon and lingo in conversation. But if you're catering to recent college grads, you might be more laid back, concise, and conversational in your approach.

Potential Blockers to Using Chatbots
What would stop you from using a chatbot?

Reason	Percentage
I'd prefer to deal with a real-life assistant	43%
I'd worry about it making a mistake	30%
If I could only access it through Facebook	27%
I'd prefer to use a normal website	26%
If it wasn't able to 'chat' in a friendly manner	24%
Nothing would stop me from using a chatbot	15%
Other	3%

Many businesses have a brand voice that distinguishes them. Creating guidelines around the do's and don'ts of your voice can make customers feel like they're always talking to your brand--not to different individuals who are simply manning your chat support.

Getting all the minor, important details of your chat support sorted out beforehand will set the right expectations for your staff but also create a consistent experience for your customers so that there are no surprises.

Often surprises can cause confusion or frustration, having the opposite desired effect of what chat support is supposed to deliver.
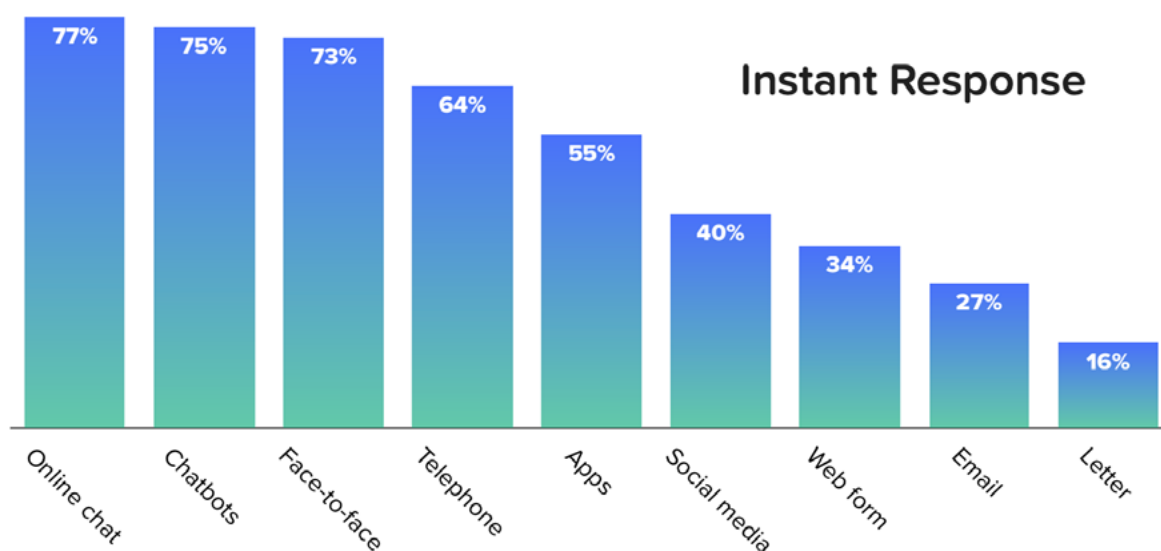
Be quick

By now you know that one thing chat support has going for it is the speed at which clients can communicate with you. The moment someone visits your site or page, you want to make sure you're able to greet them within seconds.

Severe delays can be *a live chat nightmare.* However, getting to everyone on time isn't always feasible, especially when volumes peak.

Response Time by Communication Channel
How soon would you expect to get a response on each of these channels?

Online chat	Chatbots	Face-to-face	Telephone	Apps	Social media	Web form	Email	Letter
77%	75%	73%	64%	55%	40%	34%	27%	16%

Instant Response

Here are some things that can help you out:

1. Consider canned responses

Canned responses can come in extremely handy when you're pressed for time and high on volume.

Create a standard greeting that can activate within a certain amount of time when visitors pop in to greet customers and ask them if they need help with anything. This ensures that each person is greeted in a timely fashion.

But it also buys you time as they take a moment to respond while you take a pause or wrap up with another customer.
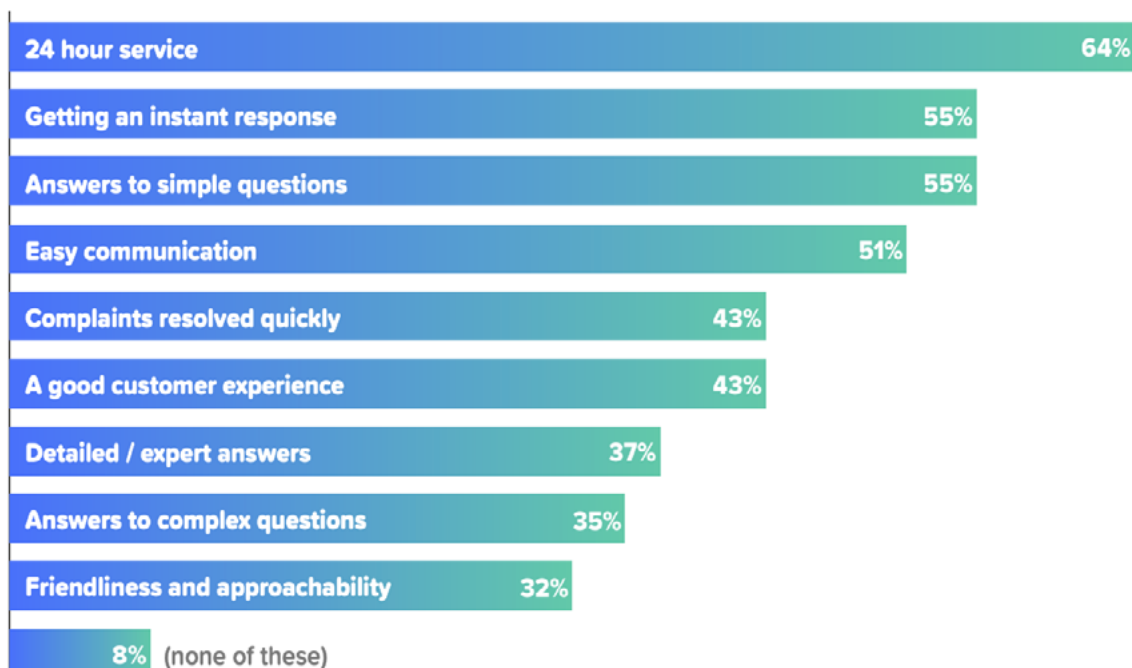
2. Keep resources at the ready

Over time, you'll start to notice questions that pop up more frequently than others. Track them and create documents, tutorials, FAQs and digital brochures to share with clients in answer to frequently asked questions so you don't have to repeatedly type in the same answers.

For instance, you might keep pricing sheets, product description and lists of services at the ready, because these are things people most commonly ask about.

Even better you can improve your site content to more directly answer FAQs so you free up chat support for more specific questions and needs.

Potential Benefits of Chatbots

If chatbots were available (and working effectively) for the online services that you use, which of these benefits would you expect to enjoy?

Benefit	Percentage
24 hour service	64%
Getting an instant response	55%
Answers to simple questions	55%
Easy communication	51%
Complaints resolved quickly	43%
A good customer experience	43%
Detailed / expert answers	37%
Answers to complex questions	35%
Friendliness and approachability	32%
(none of these)	8%

3. Gather information before you chat

A lot of chat software helps collect some information from the client automatically before you even begin speaking to them.

This helps kill some time as you tend to other clients, but also gives you a chance to better prepare and more quickly and efficiently address the client's needs when it's their turn to be served.

Respond with tact

How you speak with each customer matters. Here are some best practices to follow to make sure you're responding the best way possible each and every time.

1. Get personal

It sounds simple enough, but using a customer's name from the onset helps create an immediate connection with them and personalizes your conversation. And that's exactly what you want.

Chatbots are more impersonal than face-to-face conversation, so you want to do as much as you can to remove perceived barriers and appear approachable, friendly and helpful.

Addressing someone by their name helps with this and also helps with the next tip.

2. Appear and sound human

To deepen your connection and appear like a real person versus a pre-programmed bot, you'll need to look and sound human.

For instance, display your chat representative's names and pictures so people are able to visualize them as a person. Also, write like you talk. Don't try to impress with big words, jargon and stiff language. .

Think of ways you can interact with clients, within your established brand voice, so you sound like your brand in human form. For instance, use your manners with please and thank you, and (if appropriate for your brand) use GIFs and emojis in responses.

Impact of Inconsistent Brand Usage

Impact	Percentage
Create confusion in the market	71%
Damage credibility	56%
Make it harder to compete	30%
Interrupt or slow down sales cycle	29%
Hinder ability to generate leads	28%
Jeopardize brand trademark status	27%
Embarrass employees or lower morale	26%
Increase costs	23%
Cause loss of revenue	16%
Other affects	1%

3. Put yourself in the client's shoes

Whoever manages your live chat may, at times, feel overwhelmed by traffic spikes. However, no matter how busy it gets, make sure you always make it a priority to listen to each customer's needs or concerns and acknowledge their sentiments.

For example, if you have a customer who is frazzled, take a moment to listen, acknowledge and empathize about their situation. If you're rushed or half-hearted, customers will pick up on it and that will work against your efforts to deliver better support service.

4. Stay positive

You'll inevitably stumble into customers who have issues or gripes about your offerings. In these instances, remain positive and helpful. Even in written form, people can pick up on cues, tone and intent. So if you're rude, sarcastic or curt, that'll be pretty evident to your customer.

For instance, don't repeatedly ask a customer if there's anything else you can help with. This can make it appear like you're rushed or bored.

Let them take the lead on the conversation and then when you're fairly certain they've been helped, then and only then ask if there's anything else you can assist with. Keeping positive and patient in your mind will let those sentiments translate through into your words.

Communicate well

Because your communications with customers will happen largely through writing, you'll need to master some basic skills to make sure you're communicating well.

Follow these tips to get started.

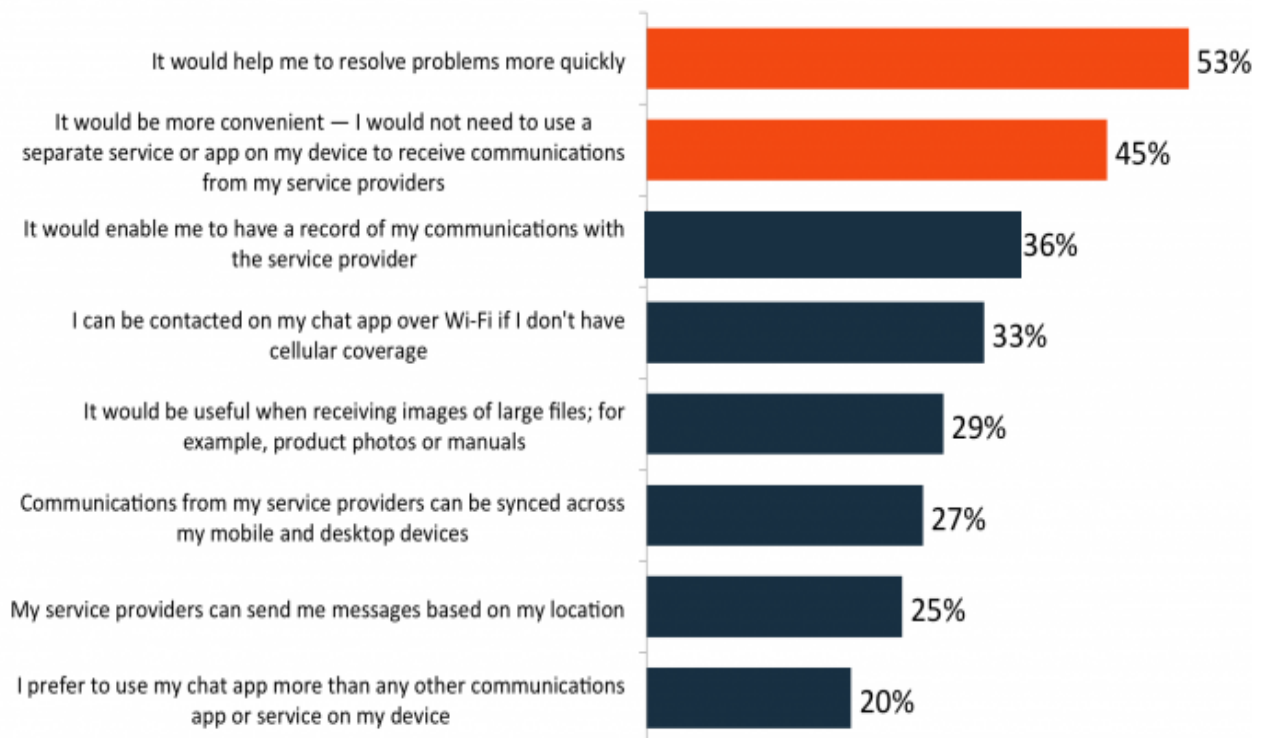## 1. Take time to understand the issue or concern

Often it's easy to misinterpret questions or asks when we're rushed or juggling too much at once. But in live chat, those slip ups can make you appear inattentive or careless, which is not how you want to portray your business.

Take time to comb through the customer's question/concern at least a few times to make sure you understand exactly what it is they're looking for. If you're unclear, ask clarifying questions so you can make sure to guide them in the right direction.

Equally as important is reading your own response to ensure you're sending the right reply to the right person. This is a particularly important step when you have multiple chat windows open.

Reasons Consumers In The US And Germany Want To Be Contacted By Service Providers Over Chat
2016

Reason	Percentage
It would help me to resolve problems more quickly	53%
It would be more convenient — I would not need to use a separate service or app on my device to receive communications from my service providers	45%
It would enable me to have a record of my communications with the service provider	36%
I can be contacted on my chat app over Wi-Fi if I don't have cellular coverage	33%
It would be useful when receiving images of large files; for example, product photos or manuals	29%
Communications from my service providers can be synced across my mobile and desktop devices	27%
My service providers can send me messages based on my location	25%
I prefer to use my chat app more than any other communications app or service on my device	20%

2. Be accurate and correct

Probably one of the worst things you can do is offer up an answer that's incorrect.

Providing subpar or inaccurate responses defeats the whole purpose of live chat and can in fact work against you when customers realize your error and grow agitated or upset. Ultimately, wrong answers are a waste of everyone's time and efforts.

Be sure to research your answers before you respond. If doing so will take a moment, let the customer know that and tell them how soon you'll be back with an answer. At least this way, they won't be waiting endlessly wondering where you went or why you disappeared.

3. Be thorough

Another way to give clients the attention and care they deserve is by providing amply detailed (but not overly detailed) responses. For example, give reasons for your suggestions or responses, if they warrant one.

Or if you're not able to offer a solution, be sure to let the client know why.

Being thorough clears ambiguity and prevents confusion while showing the customer you've spared no effort in giving them the time and attention they deserve.

4. Write well

When you're interacting with customers over the phone, you're careful to appear polished, well-spoken and articulate. The same should apply over chat support.

How you communicate is a reflection of your business, so make sure you're spelling words correctly and using the mechanics of good writing.

Sloppy responses could cause you your credibility, causing customers to take your brand less seriously or question its authority.

That brings us to the next point.

5. See before you send

Before you click Send, proofread your responses. Live chat software often lets you receive chat transcripts so you can keep review your response quality. Look for common grammar and spelling errors and coach your team accordingly.

You might even come up with a cheat sheet of the most frequent errors to avoid.

Other practices to adopt

Implement some additional best practices if you're really looking to take your live chat experience to the next level.
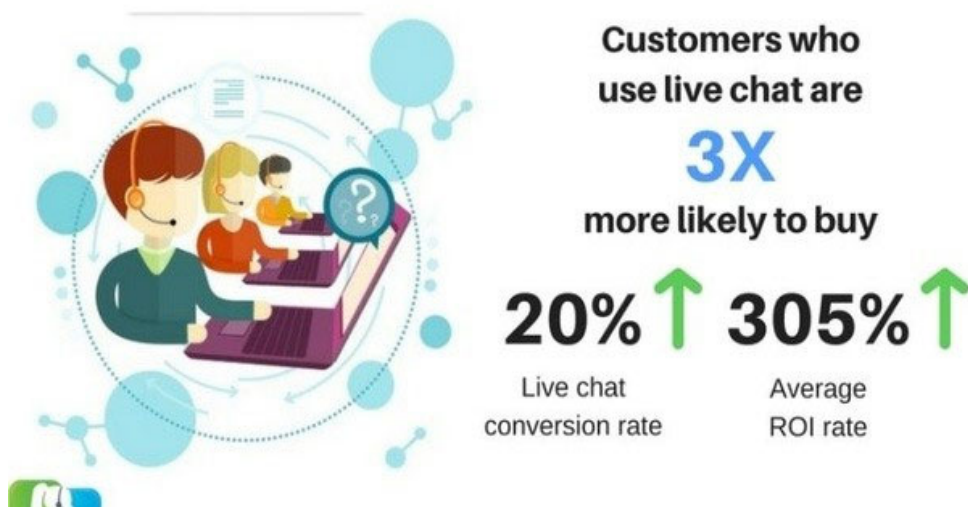
Place your chat window strategically

Where you place your chat window matters. Putting it in the bottom right of your page will make it more visible to viewers.

Make your chat box really stand out by using a vibrant or distinct color for it so that it attracts the eye without stealing attention from other important components of your site.

To maximize usage, consider placing a chat window on each page of your site where it can help. For instance, your pricing page, product offerings page and demo pages could probably benefit from having a chat representative available to field questions.

Having a chat window available readily on the page lets customers get in touch with you quickly with minimum hassle, which can also help increase sales and conversion rates.

Customers who use live chat are **3X** more likely to buy

20% ↑ Live chat conversion rate

305% ↑ Average ROI rate

Screenshare

A virtual walkthrough can be extremely powerful in helping explain how a feature works or navigating customers through issues they might be experiencing with your software, for instance.

Screensharing is great because it lets agents conveniently gain control of a visitor's PC so they can deliver helpful instruction and guidance, give demos and better interact with customers side-by-side in a one-on-one way.

Even better, permit real-time resolutions to minor, technical setbacks or learning curves a client might be experiencing.

Train, train, train

On the surface, live chat seems pretty straight forward: greet the customer, understand the question/issue, find a resolution.

But delivering exceptional, accurate and timely support is a skill that requires training, knowledge, and regular feedback. And it's up to you to deliver that.

First things first, you can't deliver good service or drive customers into action if your live agents themselves don't have a firm grasp about your offerings.

Giving them the tools, information and training they need to educate them on your products or services so they in turn can make believers of buyers.

Enabling them to confidently serve on the frontlines with customers, knowledgeably describe your offerings and passionately educate clients about them will increase your client satisfaction but also positively impact your bottom line.

Aside from product details, agents should also know how to talk price. Arm them with pricing information, but also train them on how to handle queries for bulk discounts, if applicable. This way they can close a deal without delaying to get approval from you.

The easier clients can get the information they need, the faster they can buy.

Lastly, make sure your agents know how to use your chat software. Each kind comes with different widgets and tools, and your agents should know what each one does and how to use it.

Pay attention to your customers to offer timely help

Visitors can sometimes be shy, rushed or simply browsing. But if your agents use the information available to them through most chat software, you can optimize and customize each visitor experience by offering the right support at the right time.

For instance, your chat software might offer certain details about visitors, such as their location, which page they're browsing and how many times they've visited your site.

Leveraging this information, you can strike up a conversation to increase satisfaction and conversion rates.

Say for example you have a customer who's been on your FAQs page for some time. An agent can safely assume they're looking for an answer to a particular question, at which point they can pop in to offer assistance.

Or if a customer has visited several times in the past, the agent might welcome them back.

This level of customized care shows people you pay attention to and value your visitors.

Take advantage of CRM tools

CRM is a powerful tool that can help boost a customer's chat support experience. For instance, if a customer keeps buying from you online but has special delivery requirements, it's a nuisance for them to relay instructions to you each time they place an order.

With a CRM, like Freshsales you can collect important details for all your customers, including their name, business, contact info and other pertinent notes or information.

This makes for a smoother and easier customer transaction, increasing efficiency and convenience.

Continue to improve and tweak your process

Finally, when you've done all you can in making your chat support the best it can be, it's time to dig in to see what's worked well and what hasn't. Take time out on a monthly or quarterly basis to identify the strengths and weaknesses of your chat support.

For instance, what is the average wait time before customers are served? What are common gripes? What are customers happy about? How productive and efficient are agents? Make sure you're *quantifying your customer experience.*

Next, brainstorm how you can develop on your weaknesses and maintain your strengths. Simply rolling out a live chat strategy isn't enough, because if you're not doing it well or doing it right, then all your efforts will be for nothing in the end.

That's why monitoring and analyzing your chat results on a regular basis is just as important as everything else you're doing to make sure clients have a phenomenal experience with you.

> **"73% of customers find live chat to be the most satisfying way of communicating with a business"**

Conclusion

As you can see, chatbots are a lot more than just a quick and convenient way to provide customers assistance.

Although it does offer a clear advantage in driving customer satisfaction, chat support also benefits your business in many other ways like with marketing efforts, sales performance, page rankings, and differentiation.

Because of their success with customers, chatbots are now a dynamic tool that many businesses in many industries use.

By delivering customers a quick, easy and convenient way to do business with you, not only are you giving them exactly what they want, but you're also encouraging repeat business.

Deliver them an exceptional chat support experience and they're likely to become your greatest advocates, boasting about you to others in their network.

In a day and age where customer delight and referrals drive business success, that's definitely the way to go.

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