Agent’s Handbook

Your guide to satisfied customers
Introduction

LiveChat is a tool that facilitates communication between a company and its customers. Agents who wield that tool use it to make customers happy and satisfied.

Through one to one communication, which involves answering various inquiries and solving problems, agents should strive to create pleased customers.

Every client counts and no inquiry should go unanswered. You, as a live chat agent, should do your utmost to leave your customers with a big smile on their faces.

At the end of the day, there is nothing better for a live chat agent than a customer dropping by just to say “You are awesome and keep up the good work!”
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FIRST STEPS

First time login

There is one very important thing to understand when you login to the application for the very first time. After typing in your user name and password, you become available for chat. From now on, you should be prepared to receive chats from customers.

This means that every time a chat goes unanswered customers will get bad experience. This should be avoided at all costs!

Follow this link to access LiveChat:
https://my.livechatinc.com/

Agent statuses and staying online

When you login to the application, depending on your previous settings, you can have either the 🔄 Accept chats status or the ☎️ Don’t accept chats one.

In either case, to receive chats, you need to have the 🔄 Accept chats status. If you don’t want to immediately engage customers, you can stay in the ☎️ Don’t accept chats status and just monitor the traffic on site.

 примечание

- Will receive chats
- Can monitor clients
- Use this status as much as possible

 примечание

- Won’t receive new chats
- Previous chats can be continued
- Can monitor clients
- Use this one if you are about to leave and want to finish your chats
Agent statuses are very important. Every time you change your status, you virtually change, to some degree, your chat’s availability. Only with the Accept chats status you will be able to receive new chats. This means that, whenever you use the Don’t accept chats status, you may miss potential chats and customers.

Whenever a customer comes to your chat and you are not available, an offline message will be displayed and the client will be able to leave you a note. This can be irritating since the client needs his or her case resolved now, not in a few hours.

You should try to stay available and use the Accept chats status as much as possible. This is where our mobile applications come into play. They allow you to stay online longer, even after the working hours, by chatting from your mobile device.

If you ever notice that you are not receiving any chats, your agent status is the first thing you should check. In most cases, you will find that you’ve switched to Don’t accept chats.

02 AGENT’S BREAD AND BUTTER

Where do chats come from?

There are a couple of ways you may get a chat with a customer. The most common are greetings and chat buttons. Upon clicking them, customer will start a chat.

Another way of receiving a chat you can encounter is through a chat transfer. Agents use chat transfers to hand over their chats to other agents. This can be useful when the agent doesn’t know how to answer a particular question or there is someone much better to speak to on a particular matter.

Although they can be helpful, chat transfers, if not executed properly, can lead to a bad experience too. Try not to overuse them and always make sure that the client with whom you are chatting is OK with a transfer.
Whenever you are making a chat transfer, let the client and the other agent know what you are planning to do. If you are on the receiving end of a chat transfer, let the customer know that he or she doesn’t need to explain the situation again since you have all the important information required to resolve the situation in the form of a full chat transcript.

If your live chat uses the **LiveChat for Fan Pages** integration, you can have a large number of customers coming from your company’s Facebook page. Using this integration can drive a lot of additional visitors to your live chat. You need to be prepared to handle the additional traffic and identify valuable prospects, i.e. people who intentionally found your live chat and are possible buyers.

## Chats section

When it comes to using live chat, there is no other place more useful than the **Chats section**. This is where the magic happens. Nearly all the communication with your clients will flow through the Chats section, making it one of the most important windows for any live chat agent.

Here’s how the Chats section looks like, along with its main functions:

We’ll go through all the main parts of the Chats section to show you the ins and outs of the chatting process.
Message area – type in your message here and send it to the customer.

Conversation – previously sent messages, both from you and your customer.

Visitor circles – list of all the customers who are chatting with you. You can switch between chats by clicking on different customer circle on the list.

The circles will change color depending on the state of the chat. If everything is going smoothly and customers don’t wait for your responses, the circles will be green. However, if your customers are waiting for a longer period of time, the circles will go red. Try to stay in the green as much as possible.

Timeline – quickly accessible previous communication with a particular visitor. The Timeline gives you an insight into previous chats with online visitors, which can be useful when answering an inquiry or solving a problem.

Customer information – information about the person with whom you are chatting. Here, you will find all the information provided by the customer. Alternatively, the name of your customer will be displayed here if he or she logged in with his or her Facebook account, along with a link to the account itself.

Having access to information about customers opens up a lot of possibilities when it comes to developing closer relations with your clients. Something as simple as addressing someone by his or her first name is a good way to start a conversation and creates a closer relation between the agent and the customer.

More button – a number of tools and integrations useful for every agent. If you would ever want to transfer or stop a chat, you will find those options through the More button. Additional information on tools and integrations can be found later in this handbook.

All of the aforementioned areas are crucial when chatting. Staying informed and aware of the changes in these areas will prove to be very useful when chatting with clients.
Getting the first chat

After you get yourself accustomed with the Chats section, it’s time for your first chat! There are a few things worth remembering when handling the very first customer and customers in general:

- Be prepared, both in terms of your ability to answer as soon as the customer asks and in terms of your product knowledge
- Stay focused and provide simple answers in order to solve your customer’s case as soon as possible
- Don’t panic if something goes wrong. We’re human after all! If you make a mistake, simply apologize and proceed to solve the case

Keeping these three points in mind should get you successfully through your first chats. There’s one more valuable piece of advice that you should keep in mind:

Whenever you are in doubt, ask yourself one simple question: “Will this make the customer happy?” Staying customer satisfaction oriented is always a good way to handle difficult decisions and is sure to produce good results.

Improving customer satisfaction

In a live chat environment, there are a number of things that factor into successful customer service. Ranging from response time to transfers, agents should know what kind of actions should be avoided and which are encouraged to achieve the highest customer satisfaction rates.

Response time – the best, and possibly the easiest, way to increase customer satisfaction is to shorten your response time. Nothing screams “bad experience” like a customer that has to wait for a few minutes for each of your answers. Avoid that at all costs! Quick response time is what every customer expects and appreciates.
Chat etiquette – answering correctly to an inquiry doesn’t always mean that a client will be satisfied with the answer. Every live chat agent should learn to understand customers’ position and answer accordingly. There may be customers who are annoyed or even angry. They require, apart from the answer to their questions, assurance that their case will be taken care off. You, as an agent, are the person that will provide that kind of assurance and will do your utmost to see the case resolved.

Daily summary – what a better way to track your progress as an agent than daily summary of your live chat activities sent to you by mail? Daily summary offers information on the number of your chats, missed opportunities and suggestions stating which areas need improving. Try to improve the areas highlighted in the daily summary and see your live chat grow!

Information about customers – utilizing pieces of information about your customers can offer new ways of handling some situations. Knowing what page your clients are currently viewing or what search keyword led them to your site may be crucial in solving the inquiry. Funneling various information channels available in live chat and your own tools and resources, like CRMs or client databases, can make the difference between an informed and a guessing agent.

Canned responses – an easy way to convey large portions of text. They allow you to recall pre-made answers by typing in hash (#) and the tag for the desired response, be it short or long.

If you tend to use a particular answer often, consider adding it to your canned responses list. It may come in handy later on!
STAYING INFORMED

Instead of waiting for a client to click one of your chat buttons or greetings, you can play a more active role in engaging clients. Sending greetings at the right moment can be a powerful tool in your client acquisition efforts.

Using the plethora of information you are able to get on a particular visitor, you can craft an invitation that is simply too good to pass on!

For example, when you see a client that is looking at a particular group of products and goes back and forth between two models, you could send an invitation to chat and offer help to make his choice easier.

This kind of personal touch goes a really long way in developing good relations with your visitors and should be considered as another way to satisfy customers.

Gathering information

In order to prepare targeted invitations, you require means to learn valuable information about your clients. One of the better tools to acquire that kind of information is the Visitors section. It complements the Chats section with valuable knowledge and creates opportunities for customer engagement. Here are some of its main features.

![Image](https://www.livechatinc.com)
Visitors – this is where all the good stuff is. All the information you will ever need to lead a chat can be found here. You can track a number of information about your visitors: their name, currently viewed site, current location and time zone. The list goes on.

Currently viewed page is one of the most useful metrics that the Visitors section provides. It gives you an idea what your clients are doing on your site, which part of the site draws the most attention and which is quickly skipped. It can be used to help customers find the product they are looking for or even to fine-tune and develop your site in terms of usability.

Status – this part displays your current status and can be used to change it to a different one.

Detailed visitor information - relevant visitor information that is gathered by LiveChat. Use this information to offer more personalized and precise support. Additionally, through the buttons found here you can start and supervise chats.

Navigation - access your chats, settings and valuable data via the navigation bar. You can easily browse through archives and reports without dropping your ongoing chats.

Customer Queuing

Your live chat might be using queue to assign chats to agents. This means that clients that come to chat had to wait for a certain period of time. You need to be on top of your game when handling inquiries coming from a customer that waited in a queue. The longer a client has to wait, the higher will be his or her expectations.

Waiting for a long time in a queue can be a bad experience in itself. When you add to that, for example, the agent’s inability to answer a question, the customer is almost sure to leave and never come back. Be extra careful when talking to customers from a queue. It is a great responsibility and your company’s good name depends on it!
Customer Types

Live chat provides every agent with an amazing opportunity to meet all kinds of visitors and customers. Even though them may vary to a great degree, all customers need their cases resolved if you want to reach the perfect customer service score.

Here are some common client archetypes and simple ways of making them satisfied:

Confused visitors - from time to time, apart from the usual mix of visitors and customers, your LiveChat may be accessed by visitors who reached it by accident or wanted to reach a different company altogether. It is a good idea to help the person find the site he or she is looking for, especially if you don't have a lot work at the moment. Who knows, maybe the visitor will come back one day to become a client or the word about your good customer service will spread? It's definitely worth a few minutes of your time!

Angry customers - at times, you will get a furious customer who had some problems with your products or services. More often than not, their reaction will be exaggerated, however, you have to put some extra effort into assuring them that their problem will be resolved as soon as possible. Telling the customer what you plan to do in this situation might be a good idea. If you want to create a ticket or contact your IT staff, let him know. When the problem is resolved, be sure to notify the client. If you are fast enough and you resolve the case without angering the customer further, you might acquire a great ally that will spread the word about your customer service!

Undecided customer - some customers, when looking into your offering, have a problem deciding which product or service is the best fit for them. In such situations, you should to try to learn something about the visitor to give a more informed advice. When the client decides on a particular option, you can give him or her advice on how to make the purchase, i.e. where to put the credit card info or how to create an account.
Praising visitors - the best chats you will get are those from satisfied customers who drop in just to tell you how well you have done and how satisfied they are. After a hard day of work, nothing compares to the feeling of satisfaction these visitors provide. You might want to share your success with others too. Ask the visitor to Tweet or Facebook about his or her experience with your company so even more people can learn how awesome you are!

Foreign visitors - when your company grows and starts to expand, you will often face many foreign online visitors who start the chat with a message in another language. The best choice in such situation is to let your visitor know that you don’t know the language. However, with a little help from some a translation software, e.g. Google Translate, you can try to communicate. It’s always worth trying and, with a bit of luck, you may be able to understand each other.

Customers who make mistakes - at times, you will stumble upon customers who accidentally chose a different option than they intended to, they’ve made mistake in their account creation process and need something changed or simply purchased the wrong product. This kind of situations depend heavily on your company policies regarding altering various customer decisions. Even if you can’t do much for the customer, you should always try to be as helpful as possible by offering alternative ways to resolve the situation.
Additional materials

Your journey with live chat has just begun. There is much more to learn and much more ways you can fulfill your customers’ expectations. “What’s next?”, you might ask.

We have a number of materials available on our Knowledge base. These materials will give you an even better start and prepare you to use some of LiveChat’s more advanced features. Head on to the Knowledge base and start mastering LiveChat!

We also have a number of helpful integrations that you might want to check out if your company is already using one of the supported 3rd party applications. The Integrations link LiveChat to other solutions and allow for fluent and seamless cooperation. Check the list of our Integrations and see if you can simplify your work. If you are looking for an inspiring examples of good customer service, you might want to look into Rackspace, a hosting company famous for its fanatical customer service, and Zappos, an online retailer with an amazing customer service culture. Both companies set very high customer service standards and definitely are worth a closer look, if you’re looking for good customer service practices.

Since both companies are using live chat on their sites, you can get a first hand experience and learn a few tricks by starting a chat with them. Go to www.rackspace.com and www.zappos.com and experience the customer service magic yourself. If you manage to implement the good practices in your daily work, you will be one step closer to becoming an agent that every customer wants to encounter on live chat.

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