Reducing Customer Effort in the Chat Channel

Better chat writing strategies for a
better customer experience

Chat verbatim analysis of customer service leaders

Executive Summary

As consumers continue to move their conversations and business transactions online, companies must pick and choose the customer service and support tools appropriate for the customer experience. While social media support is getting a lot of attention these days, it is important to remember the more traditional service channels to connect and engage with customers. One untapped area with lots of potential is online chat – either reactive, proactive, or both.

As a follow up to the white paper, *Best Practices: Online Chat Sales – Boosting customer service and sales ROI*, TELUS International again commissioned SPOT Consulting to analyze the written communication between chat agents and customers. As a contact center provider to a number of global companies, TELUS International continues to focus on the chat channel via continual research, application of best practices, agent training and actionable measurement. The purpose of this paper is to show how agent writing skills can significantly impact customer effort.

The analysis provides excerpts from chat transcripts which illustrate particular concepts that are critical to providing efficient and effective communication. Each verbatim was analyzed in terms of the writing strategy, response accuracy, grammar and other important criteria as detailed in the *Best Practices: Online Chat Sales* white paper. Each chat verbatim is categorized as follows, with each section demonstrating positive and negative approaches to chat communications:

- **Conversation Flow** – Agents need to understand the logical progression of a chat session from greeting to issue resolution or sale to closing to a post-chat survey request.

- **Agent Skills** – Agents should portray confidence and knowledge in the company and its products at all times.

- **Communication Style** – Agents should write responses using clear language and proper grammar and in a tone that reflects the company's image.

A note about company identities

All chat examples are taken from Fortune 500 companies that are considered leaders in their industries based on American Customer Satisfaction Index (ACSI) and/or Net Promoter Scores (NPS). Unless the chat experience was deemed as a good example, the identities of the companies and/or specific products have been replaced with generic terms. The point of the report is not to identify companies that have provided poor chat experiences, but rather, to identify that the chat channel has room to improve and that writing skills are essential to customer understanding, effort and overall satisfaction.

Why Customer Effort Matters in Chat

Online chat offers a powerful engagement platform that is real-time, secure, personal and very cost-effective — attractive attributes as companies look to engage more customers online while reducing their call volumes into the contact center. However, the key is to launch online chat effectively to avoid potential customer frustration and brand damage.

When a customer comes to your company for support, they are looking for a few key things – namely, make it easy and make it quick. For the purposes of this paper, customer effort simply refers to the amount of work, time, and understanding a customer must spend to get his/her question answered or problem solved. A 2010 Harvard Business Review article, *Stop Trying to Delight Your Customers*, supports the importance of customer effort. According to the article, "delighting customers doesn't build loyalty; reducing their effort—the work they must do to get their problem solved—does." As a result, agents should focus on reducing the effort a customer must make – and this includes the amount of work required to interact in the chat channel.

Related Research

Benchmark Study - Best Practices: Online Chat Sales. To validate best practices for online chat sales and to help companies maximize their own online sales and customer service, TELUS International (a global contact center outsourcing and BPO provider) commissioned a benchmarking study using an independent consulting firm, SPOT Consulting.

Sixty in-depth web chat sessions were conducted and a further 150 chat transcripts were reviewed from six Fortune 500 companies to analyze the qualitative metrics of an ideal online chat sales session. The results were scored against three major criteria that contribute to the total customer experience: agent skills, communications style and chat system features. Results, conclusions and recommendations for best-in-class sales chat are detailed in this white paper. The complete white paper is available for download at: telusinternational.com

---

➢ Category 1: Conversation Flow

Companies should expect their chat agents to direct the written conversation flow such that the needs of customers and the company are met. The typical pattern of a chat interaction is greeting, customer issue resolution or sale, closing and possibly a post-chat survey request. Customers expect the chat channel to deliver direct, rapid responses as they progress through the chat session with agents.

Greeting

Verbatim 1: The following overly long greeting increases the risk that the customer will lose interest before getting started.

> *Agent: Welcome to [Company] Electronics and Accessories Sales Chat! I hope you are doing well and thank you for waiting. My name is David and I will be your Sales Agent today. [Company] now offers secure Payment via Chat for our chat customers for faster and secure way of ordering consumer products. In line of unavoidable disconnection due to connectivity issues between server and browsers, feel free to provide your phone number so that we can contact you in case we get disconnected. Thanks. How can I help you with your purchase today?*

Analysis: Customers choose chat because it is a fast medium that allows them to multi-task online. Leading with a wordy greeting forces the customer to respond to questions and comments that are not directly related to the particular issue and sets a negative tone for the overall chat session. A better opening would be, "Welcome to [Company] Live Chat! My name is David. Thank you for waiting. How can I help you?" It's important to address and resolve the initial customer question quickly. From there the agent can start probing and facilitating the conversation in a particular direction.

Transfers

Verbatim 2: When agents need to transfer customers to other agents or departments, they should, at a minimum, cold transfer the chat sessions. They should not require customers to engage in new chat sessions or call in.

> *Agent: It sounds like it could be one of several issues, but I am unfortunately not equipped to diagnose the problem you are experiencing. I think the best course of action is to call Technical Support at 1-800-***-**** or e-mail them at support@company.com. I could also connect this chat to their department. Would you like me to?*

Verbatim 3: Agents should not push customers to use their non-preferred channel.

> *Agent: As we are Sales Care Department for building new systems only i recommend that you call our Customer Care Department for that here is the number 1-***-****-**** to further assist you.*

Analysis: Sales or support chat experiences should appear to be seamless to the customer. Customers resent having to repeat their issues to different agents. If they have to work hard to get their questions answered, customer satisfaction and loyalty suffers. Organizations should consider allowing agents to

collaborate with other departments to resolve customer questions through one agent. Another option is to empower agents to make decisions to improve customer satisfaction (e.g. extra discount on multiple orders or ability to cancel an order).

Closing

Verbatim 4: Like the opening, the closing sets the tone and supports the overall corporate brand.

> **Agent:** *Did you have any other questions or anything else?*
> **Customer:** *No. I'll call-in later.*
> **Agent:** *If anything else does come up, we are here 24/7 for you! Have a great day!*

Analysis: The brief closing from this Zappos agent supports the company's brand of providing the very best customer service. The upbeat and friendly voice of the company comes through in this closing and reinforces the brand image.

Survey Request

Verbatim 5: The survey request should be formal and should be outside of the chat session.

> **Agent:** *My buddies and I are having a friendly competition. If you have about 60 seconds, please answer our survey at the end of this chat. If you have any additional comments, please add them to the "Comments" field or email my manager at name@company.com at the end of the survey. The survey will appear above the chat session window once you click the EXIT button. Please scroll up so you can see it. Thanks again :) !*

Analysis: When possible, move the survey out of the chat closing and make it a pop-up at the end of the session. The message on the pop-up could say, *"We value your input. Please take a few minutes to send us your feedback."*

➢ Category 2: Agent Skills

The agents who exemplified strong agent skills had certain common characteristics:

1. Portrayed confidence and knowledge in the company and its products
2. Responded directly to questions asked
3. Drove the chat to positive closure
4. Did not let internal focus on metrics impede the customer's experience

The agents who exemplified poor agent skills had certain common characteristics:

1. Did not demonstrate strong knowledge of company products; could not explain items in their own words (relied on canned text to respond to customers)
2. Often kept customers waiting for responses only to send incomplete or canned responses
3. Used poor grammar and spelling, which impeded the customer's ability to understand information
4. Blatantly tried to meet internal metrics at the expense of the customer's needs

Strong Agent Skills

Verbatim 1: Zappos has empowered agents to offer incentives to close the sale.

> *Customer: Can I place my order with you?*
> *Agent: Unfortunately because of security reasons, you would have to call in to place your order. If you do call in, let them know I (Helene) have offered a courtesy 1 business day upgrade for being a first time customer!*

Analysis: Offering incentives is particularly important when an agent can't complete the transaction through the chat window. The customer has to make the additional effort to call the company to place the order, which may result in a lost sale or increased customer frustration. Adding a promotion is a good way to neutralize negative effects.

Verbatim 2: Best Buy agent probed for information specific to the needs of the customer, demonstrating ability to veer away from the script in order to problem solve.

> *Agent: Hi! My name is Christine. How may I help you?*
> *Customer: I am not very technical and am starting to look for a laptop for my kids. Can you help me narrow down a few choices?*
> *Agent: i will be certainly more than glad to assist you*
> *Agent: Is this going to be used for educational purposes?*
> *Customer: They'll use it for homework, research. But, they also play 3D games, listen to music. One of my kids wants to upload videos to YouTube.*
> *Agent: How old are your kids?*
> *Customer: They are still young 6 and 8, but the 8-yr old is getting pretty sophisticated on the computer.*
> *Agent: I understand I little cousins around that age*
> *Agent: They are constantly on the computer*
> *Agent: the 8 year old wants to record and save videos to the laptop to upload to the computer?*
> *Customer: Yes, he's talking about it. I don't know if that is realistic for a laptop, so maybe give me a few desktop options as well as laptops.*
> *Agent: Since they will be sharing are you wanting a large screen so they will both be able to see whats going on?*
> *Customer: Yes, thanks for thinking about that!*

Analysis: The agent also related to the customer's needs through personal experience, which when done sparingly builds credibility and rapport with the customer.

Poor Agent Skills

Verbatim 3: Agent from a leading technology company provided curt responses that forced the customer to do the research. The agent brought the session to a close while the customer was in the middle of typing her next question.

> *Customer: Hi. I was just trying to understand what's your equivalent to MS Office. Do you have software that provides word processing, presentation, and spreadsheets.*
> *Agent: [Software X]. if you just looking for these three we have [Software Y], which is free of charge*
> *Customer: What's the difference?*
> *Agent: Click here for [Software Y]*
> *Agent: Click here for [Software X]*
> *Customer: Will do. How much is [Software X] for a consumer, not business? Is there a chart that simply compares the features b/n the two products?*
> *Agent: Click here please*
> *Agent: unfortunately not*
> *Customer: Well, I really didn't want to spend all the time reading the webpages you sent me. Can you just tell me the price of [Software X]?*
> *Agent: 322*
> *Customer: you just sent me a URL that says Retail: $235 USD Upgrade: $176 USD*
> *Customer: What is 322 all about?*
> *Agent: Click here please*
> *Agent: great question, I am not sure about this. Sorry*
> *Customer: OK. Please stop sending me URLs. Is the difference b/n 322 & 235 for support?*
> *Agent: I will raise this issue to managment team to verify, sorry for the confusion*
> *[Note: 10 minute delay here.]*
> *Customer: so what's the answer?*
> *Agent: Please call 1 8** *** ****, the rep over there can help you on this*
> *[Agent never returned to the chat.]*

Analysis: Ensuring customers obtain the information they need without exerting a lot of effort, especially to make a purchase decision, should be a top priority for the chat channel. Companies need to balance training so that agents understand how best to meet efficiency metrics while providing satisfying experiences to customers. The verbatim above can be perceived as rude by the curt responses and constant pushing of URLs. The customer clearly didn't get the information she was seeking and will need to interact again with the company through a different channel, which ultimately drives up operating costs and customer effort. It's a lose-lose situation.

Verbatim 4: Agent from a leading consumer electronics company used promotional copy in response to a question about pricing – response was indirect and too long.

> *Agent: Only with a [specific PC brand] do you get a system built by the same people who make the hardware, operating system and most of the installed applications.*
>
> *Agent: [Company] makes a high quality product that is designed to be reliable, easier to use, and typically lasts a lot longer than PCs. That's the long-term value. Plus they include hundreds of dollars worth of bundled software, and they're designed beautifully.*
>
> *Agent: Also, [specific PCs] are not typically as vulnerable to the viruses and spyware that plague PCs.*
>
> *Agent: Also, [specific PCs] have a reputation for outstanding stability and security, you can enjoy working on your computer, rather than be frustrated by it.*

Analysis: Agent used promotional copy to provide standardized information and to expedite the chat session. However, that same promotional copy appears on the company website, which the customer may have already seen. Repeating what the customer already knows leads to customer frustration. Also, as in the verbatim cited here, the promotional copy does not directly address the customer's question, which forces the customer to probe again to get desired information — increasing the length of the chat session.

Verbatim 5: Agent from a leading computer manufacturer wasn't knowledgeable on the key components of a computer and compromised the customer relationship through delayed responses and excuses irrelevant to a customer conversation.

> *Customer: I'm disappointed that I can't find more information on this. The prices are significantly different, and I'm in the middle of configuring a system to buy.*
>
> *Customer: Are you still there?*
>
> *Agent: am sorry for the delay*
>
> *Agent: I apologize for any delay on my responses as I may be engaged in multiple chat sessions with different customers at a time.*
>
> *Agent: the reason why you get to see the change in the prices is because every processor is different*
>
> *Agent: the i7 is the fastest one among all*
>
> *Customer: OK. Can you please tell me what RAM I need to run the new Office 2010 on Windows7*
>
> *Agent: the basic standard ram in 4 GB but i will suggest you to have a 6 GB memory on it*
>
> *Customer: Why do you make that suggestion?*
>
> *Agent: it is better to have more memory this will help you save a lot of files and will have enough space*
>
> *Customer: OK. Thanks. Will this chat be emailed to me?*
>
> *Agent: is there anything else I can help you with ?*
>
> *Agent: you can select the option for print*

Analysis: Just as agents are multi-tasking on chats, so are most online customers. Effective communication is essential for all involved. Customers are more likely to drop the chat session abruptly when they detect the agent they are chatting with isn't knowledgeable, helpful or attentive. Agents who can't respond in a timely manner with appropriate responses need additional training to hone their skills.

➢ Category 3: Communication Style and Grammar

Ideal communication for the chat channel is short and on point. Customers shouldn't have to repeat questions or re-read agent responses to try and figure out the meaning. Good grammar is equally important for a similar reason — precise sentences are easy to read. Writing that is peppered with misspellings, confusing acronyms and grammatical mistakes not only confuses the reader but also calls into question the credibility of the information.

Staying On Point

Verbatim 1: Agents should carefully read and respond to customer questions.

Agent: Hi Kim, this is Sebastine from [Company] and I would be assisting you today.
Customer: I want to buy [Virus Protection Software]. I see I get free phone support for 30 days. What does phone support cost afterwards? Is there a URL w/ pricing on it that I could reference? Also, what are the hours of operation for phone support?
Agent: Kim, as I understand, you need to contact our free 30 day phone support. Is that correct?
Customer: no. please re-read my chat.
Agent: Okay, Kim.
Agent: Kim, as I understand, you want to purchase [Virus Protection Software] and need to contact our free 30 day phone support to install [Virus Protection Software]. Is that correct?
Customer: No. I want to know your pricing for phone support after the first 30 days.

Analysis: The agent clearly increased the customer's effort due to his lack of focus and attention. Customers, in general, get quickly irritated when agents don't respond directly to their questions. The end result is dissatisfaction with the agent and channel that negatively impacts loyalty and company perceptions.

Verbatim 2: Zappos effectively uses short and to-the-point answers in order to progress the chat session.

> *Customer: Is your site protected?*
> *Agent: Yep! http://www.zappos.com/shop-with-confidence*
> *Customer: Okay, I see. Can you tell me about your shipping policies?*
> *Agent: Yes, it is free shipping and free return shipping. Standard shipping is about 4 - 5 business days.*

Analysis: A key customer expectation of the chat channel is that information will be communicated quickly and concisely, like in the verbatim above. The agent should use concrete, precise everyday terms and avoid adding unnecessary information. The agent should write using active voice.

Canned Responses

Verbatim 3: Agents should avoid using canned responses that fail to directly answer customer questions.

> *Customer: What kind of warranty comes with the [Laptop Z]?*
> *Agent: We have 2-year Care Pack House Call Service with Accidental Damage Protection for [Laptop X], [Laptop Y], or [LAPTOP Z] Laptop PC and 2-year Care Pack House Call Service for [Laptop X], [Laptop Y], or [LAPTOP Z] Laptop PC.*

Analysis: When used appropriately, canned responses can be a helpful tool for agents to expedite the chat or to provide standard information. But agents must be sure that the information they provide actually addresses the customer's question. Inappropriate usage of canned responses undermines consumer confidence that the agent actually understands the company products. It also puts additional responsibility on the customer to decipher the information to find the answer. This agent's response didn't pertain to the specific product in question and put responsibility on the customer to figure it out.

Grammar

Verbatim 4: Constructing clear sentences for chat requires solid grammar, punctuation, capitalization and accurate spelling.

> *Customer:* *I'm leaning toward the [Laptop A] over the [Laptop B] because from what I've read, it seems to have better visual quality and sound. Would you agree?*
>
> *Agent:* *yes the [Laptop A] got JBL speakers nad option for full hd screen at 1920x1080pixel resolution*
>
> *Agent:* *the [Laptop B] only supports HD screen*
>
> *Customer:* *the [Laptop B], though, has a built-in webcam, correct? Does the [Laptop A] have something like that?*
>
> *Agent:* *yes the webcam on the [Laptop B] is at 1.3 megapixel*
>
> *Agent:* *the [Laptop A] got 2 megapixel webcam*
>
> *Customer:* *Oh, fantastic. Where is it located?*
>
> *Agent:* *on the screen or panel*
>
> *Customer:* *Great.*
>
> *Customer:* *One more question (I think)*
>
> *Agent:* *sure*
>
> *Customer:* *When I try to configure my laptop, at some point, I get to "Select my Sound Options". The High Definition Audio 2.2 is usually included. The other option is the Soundblaster X-Fi Hi Def Audio (which to me sounds better). What exactly does the Soundblas*
>
> *Customer:* *ter do?*
>
> *Agent:* *sou=nblaster is a soundcard that allows supports more options for audio manipulastions*
>
> *Agent:* *will give you more freedom to adjust audio controls since it is also software enabled*
>
> *Customer:* *such as what? altering bass, treble, etc? Is it necessary for me? (I'll just be listening to music, not making any)*
>
> *Agent:* *yes like those stuffs*
>
> *Agent:* *if you are very particular with your audio quality then yes it is necessary*
>
> *Customer:* *Ok.*

Analysis: Written communication should adhere to grammatical rules, including capitalization and punctuation. Agents should leverage built-in spell checkers to ensure clarity of the information and maintain credibility with the customer. Formal responses should be written in complete sentences, whereas less formal responses can be sentence fragments. Emoticons and acronyms should be used sparingly, if at all. Not all customers understand the meaning of emoticons or acronyms, even the most common ones. The example above demonstrates how poor grammar requires the customer to expend more effort to understand content. In addition, it is important to note that the customer is using good grammar but the agent responds with poor grammar.

Voice and Tone

Verbatim 5: Agents should draw on corporate identity, sales chat purpose and audience expectations to shape the voice and tone of their chat sessions. This Nordstrom agent supports the brand through formal voice and tone.

> *Agent: Hello, Kim, welcome to Nordstrom! To protect your privacy, all numbers longer than two digits are displayed as pound signs. This allows any sensitive information transmitted via chat to be visible only to the agent assisting you.*
>
> *Agent: I see your question: Looking for mid-calf boots, but I have a very small calf.*
>
> *Agent: I am more than happy to check on some mid calf boots for you! What size do you need?*
>
> *Customer: Hi. My foot is a size 10, and I've always struggled to find a nice looking booth that isn't gaping or falling down at the calf.*
>
> *Agent: Thank you. Hold please.*
>
> *Agent: Thank you for waiting. May I send you a link to the mid-calf boots we have available in size 10 with a narrow calf?*
>
> *Customer: Sure. Thanks.*
>
> *The agent is sending you tohttp://shop.nordstrom.com/SR/0~2376778~2372808~6007659~6007700?mediumthumbnail=Y&mode=pfind&tuid=5ac8a3da-c3a2-4a79-9a40-46ccfcd02a6e&catID=6007700&size=9.5&sizename=9.5&searchorigin=ProductFinder&findertype=8&findertypereqd=N.*
>
> *Agent: Is there anything else I can assist you with today?*
>
> *Customer: One minute please, I'm looking at the webpages.*
>
> *Agent: Thank you.*
>
> *Customer: Is this page just showing me boots that come in narrow shoe sizes, or boots that are extra narrow at the calf?*
>
> *Agent: The page is showing your mid-calf boots with a narrow calf.*
>
> *Customer: OK. Let me look again.*
>
> *Agent: If you go to shoes and to advanced search you can search by calf width or boot height.*
>
> *Agent: Would you like a link to the advanced search page for boots?*
>
> *Customer: I just happened to come across it, while looking at the boots.*
>
> *Agent: Great!*

Analysis: Nordstrom agents readily convey the upscale voice and tone of the brand. Clearly agents have been trained on word choices and how to politely request or send information. For example, this agent asks, "*May I send you a link to the mid-calf boots we have available in size 10 with a narrow calf?*" before pushing a URL. The overall chat experience simulates having your own personal shopper. Agents should be trained on, and expected to convey, the official voice and tone of the company they're representing (e.g. informative, professional and innovative). Agents should refrain from using their personal communication style, because customers expect a particular brand experience through all touch points with a company.

Recommendation / Summary

Agent writing skills are a leading factor in effective online chat communications. As detailed in the *Best Practices: Online Chat Sales* white paper, it is important to train agents specifically for chat including how to construct a conversation flow, how to use the appropriate voice and tone to support the company's brand, and how to write effectively and accurately. When it comes to customer care, focus on making it easy for the customer. When it comes to technical support, focus on fixing it and fixing it fast. Online chat is a powerful, cost-effective customer service and sales channel that deserves its own specialized attention to training and quality. Start by analyzing the chat transcripts of your own agents using customer effort as a key metric.

About TELUS International

TELUS International is the global arm of TELUS, a leading national telecommunications company in Canada, with $9.8 billion of annual revenue and 12.3 million customer connections. TELUS International delivers contact center, IT and business process outsourcing solutions to some of the world's largest and most respected corporations in the financial services, telecommunications, consumer electronics, and energy and utilities industries. Our multi-channel programs include voice, email and chat channels. For more information about our contact center outsourcing solutions and improving your customers' online chat experience, contact Emily Millar at emily.millar@telus.com.

Learn more about TELUS International:
Web: telusinternational.com
Email: information@telusinternational.com
Twitter: @TELUSint

About SPOT Consulting LLC

SPOT Consulting was commissioned by TELUS International to perform the benchmarking chat study. SPOT Consulting is an Austin-based consulting firm focused on contact center performance and business process outsourcing. Their clients are generally Fortune 100 organizations including Sony, IBM, Apple, Best Buy, American Airlines, American Express and Sprint. For more information, visit http://spotconsulting.biz. For further information on SPOT's Market Intelligence experience and capabilities, contact Kim Keating at kim@spotconsulting.biz.

COPYRIGHT NOTICE