

Crib Sheet

Version 3.9

This crib sheet describes how an agent handles the queue, proactively contacts visitor and chats with text and video.

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1 Log In/Log Out

1.1 Prerequisites

As a browser for the Vergic Engage Platform (VEP) application, use Firefox or Chrome. Internet Explorer is not supported.

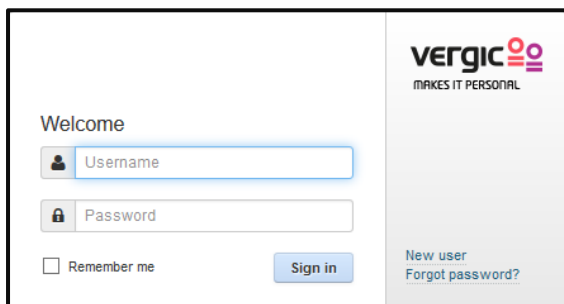
1.2 Start Vergic

1. Start Chrome or Firefox by clicking on one of the icons.
2. Navigate to the application if you're not already there. The address is:



http://companyname.pspugin.com

3. In the field "Username", fill out your email address. In the "Password" field fill out your password then click on the "Log in" button.



- 3.a If this is the first time you log in to your account, you will need to follow the instructions from the activation mail that has been sent to you.

4. After you have logged into the application you will see an empty desktop.

1.3 Close Vergic

1. Click on the icon in the upper right corner to log out.

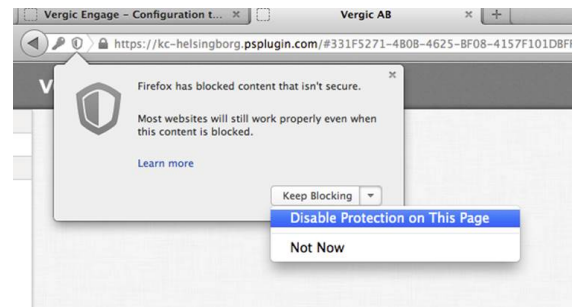


2. Close the web browser after you have logged out.

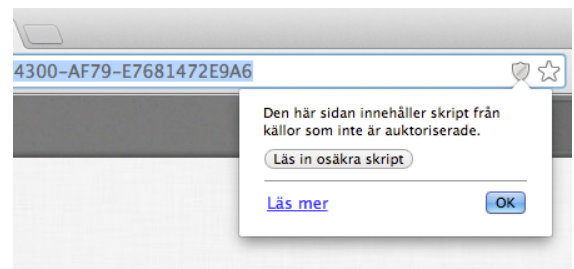
2 Prepare desktop

To be able to use visual guidance you must click on the "Shield" in your Firefox or Chrome browser to be able to allow insecure content. This action must be done every time that you start your browser.

On Firefox it looks like this:



On Chrome it looks like this:



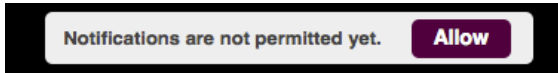
3 Visual notifications

It is possible to improve visual notification regarding visitor's updates in the browser Chrome and Firefox if there is a new visitor in queue or if the visitor has written something new in the chat.

The notification will also appear if the agent is not actively working with Vergic but is logged in.

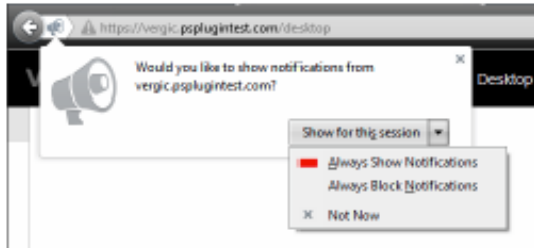
This function can be enabled by an account setting. If the account setting is enabled then the agent can easily allow the notifications by clicking on the "Allow" button in the application and the additional allow button in the browser.

Enable the notification by clicking on *Allow*.



The agent is then prompted with something similar to this.

Firefox

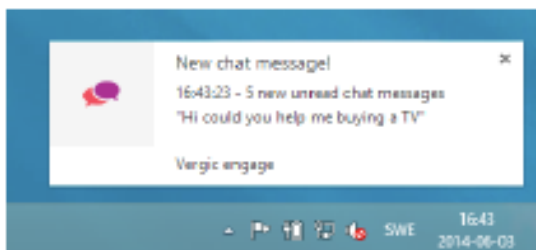
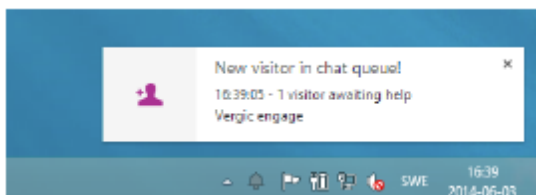


Chrome



When the visual notification is enabled and the agent is logged in but not actively using Vergic, a message will be displayed to let the agent know there is a new message in the chat which the agent should respond to.

This will enable the agent to be logged in to Vergic and at the same time makes it easier to do different tasks on the same computer. When there is something for the agent to pay attention to he/she will be notified as seen in the images below.



4 The desktop

The desktop is divided by three parts.

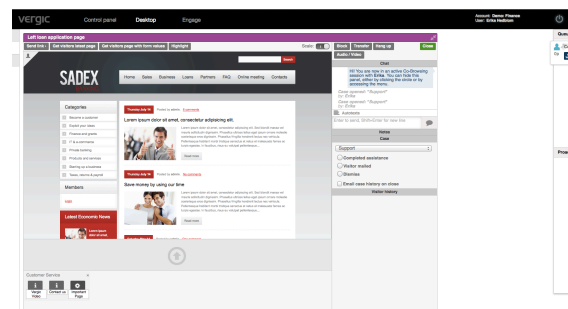
- 1) Left side fold out menu.
- 2) The dialog area.
- 3) Right side fold out menu containing the queues.

To view the fold out menu fully, you need to hover over it with your mouse.



The dialog area is empty until a dialog starts. When a dialog is started the dialog area is divided into two parts:

- 1) A maximized dialog subarea.
- 2) A minimized dialog sub-area for the other active dialogs. If an agent only has one active dialog this area will be empty.



5 Queue

The queue is a fold out menu, per default it is minimized on the desktop. You need to hover over it with the mouse pointer to make it expand.

There are two queues

On top is a reactive queue. The reactive queue shows all the visitors who have actively asked for help from a banner. Below the reactive queue you find the proactive queue. Visitors in

the proactive queue have not actively asked for help from a contact banner but their behaviour on the website shows that they might be in the need of help or are showing an interesting behaviour.



On each item in the queue, the agent can see a header which indicates where the visitor asked for help and/or why the visitor might be in need of help. There is a set of icons showing the visitors browsing history. The icon to the far right shows the visitors current location. By hovering over the icons with your mouse from right-to-left the agent can follow the visitors browsing history.

The reactive queue is sorted by the amount of time the visitor has spent in the queue. In other words, the longer time spent in the queue the higher up you go.

The proactive queue is sorted based on a proactive score, from high to low. This score is based on a set of proactive rules which might get activated by the visitors behaviour on the website.

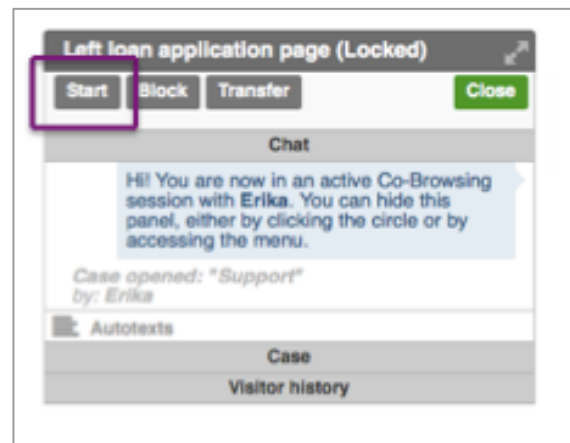
6 Dialogs

6.1 Lock

You can pick a visitor in the queue and "lock" him/her to you. To do this click on the "Lock" button.



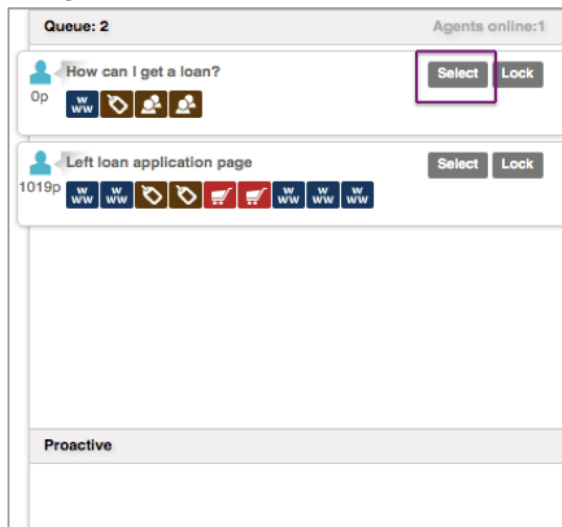
The chat will initiate when you click "Start". After that the visitor will get a message saying that you are ready to chat.



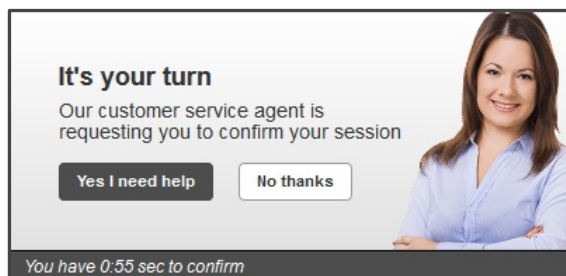
This is a good way to keep a steady flow of visitors for your agents. It can also be used to pick a certain visitor that you know you must help.

6.2 Start a dialog

Click on "Select" in the queue to initiate a dialog.



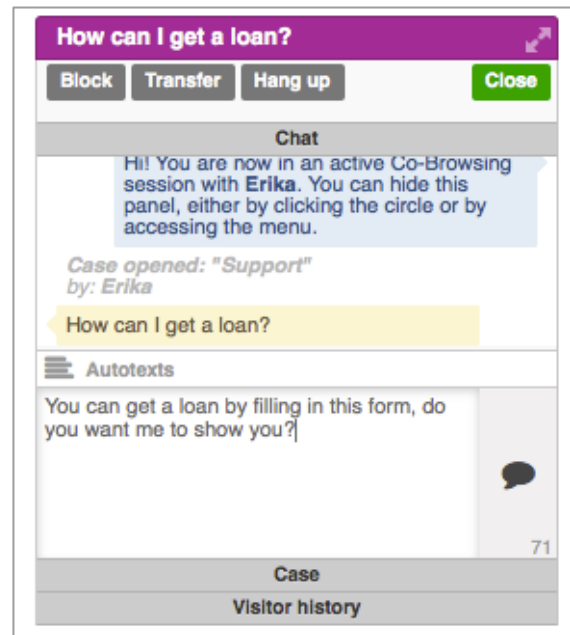
Once the agent has selected a visitor a confirmation dialog will appear for the selected visitor, in which he/she will need to answer yes or no. During the confirmation time, the dialog will be placed on the agent's desktop as a pending state.



If the visitor answers no: the dialog won't start and the pending dialog window will show the text: Visitor declined.

If the visitor answers yes: the dialog will start and a greeting message will automatically be sent.

You can handle multiple dialogs at the same time, but you can only see the visual guidance window of one visitor at the time. The other active dialogs will be placed to the right of the maximized dialog window. You can chat in all the dialog windows without maximizing them.

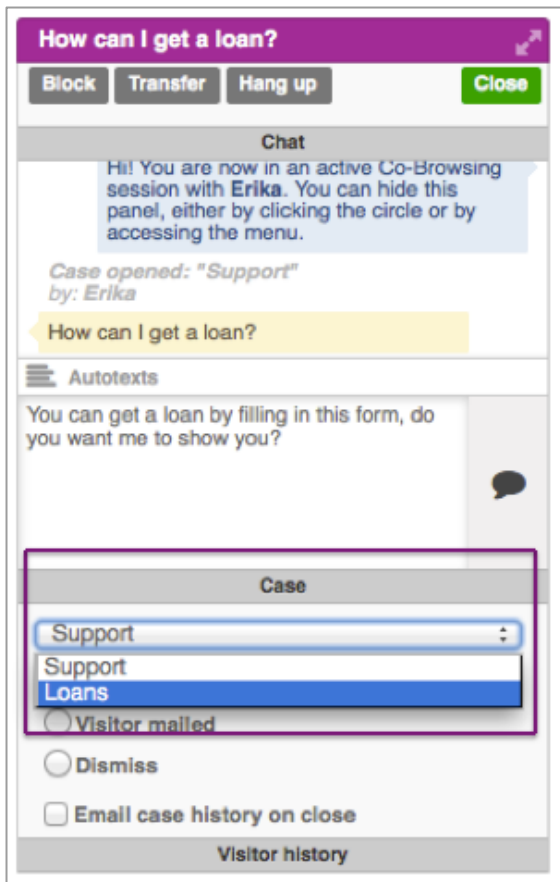


When a visitor has sent the agent a message the agent will be notified with a sound and the dialog will start to flash.

Three dots are shown flashing in the chat window when the visitor starts typing.

6.3 Case

All dialogs starts with a pre-defined case. A case can be seen as an information package, containing a set of auto text messages, shortcuts and reasons/close options. The case that is pre-chosen at the start-up is based on the visitors location on the website when they asked for help. You can always switch cases during the dialog by clicking in the combo box below the chat window.

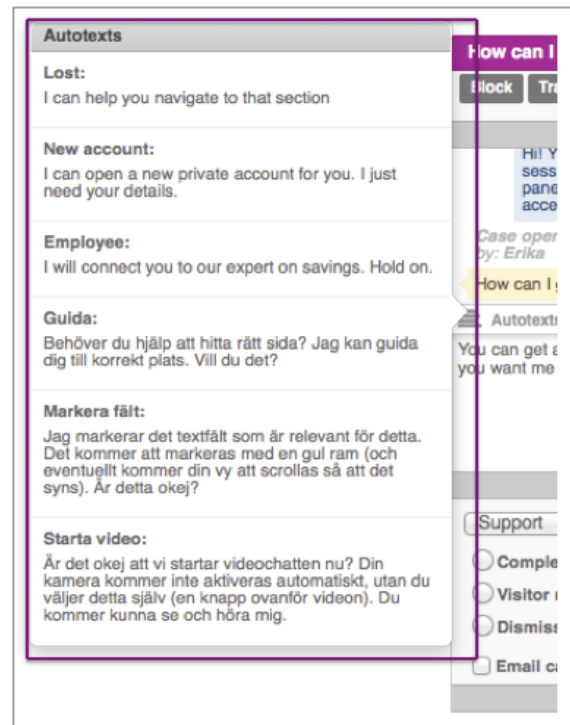


Shortcuts and auto texts will adapt automatically to the chosen case.

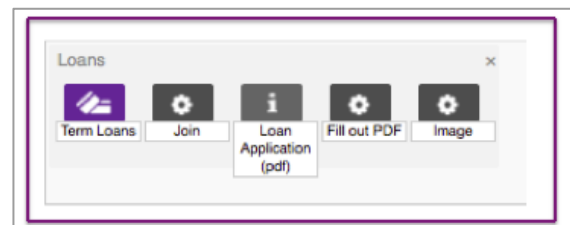
6.4 Shortcuts and canned responses

Shortcuts and canned responses/auto texts are used to create a more effective dialog. Click on the button "Auto texts" in the dialog window and you will see a list of available auto texts for the chosen case type. Click on an item in the list to use it. The auto text will then be pasted into the chat window. You can also edit the auto texts before sending them to the visitor.

Auto texts are visible in both maximized and minimized chat windows.



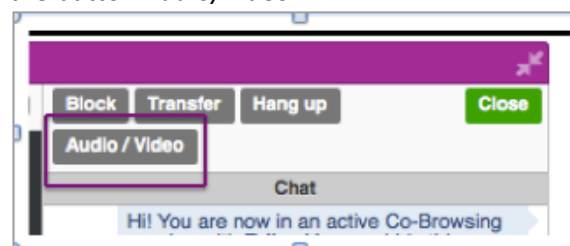
There are different types of shortcuts with different kinds of purposes. The shortcuts available are: URLs, PDFs, Videos, Images, and other. Shortcuts are used to share content or guide the visitor to a specific location on the web page. To use a shortcut, drag and drop it into the drop zone. The drop zone is located just below the visual guidance window.



The shortcuts are only visible when the dialog window is maximized.

6.5 Video chat

All dialogs starts in chat mode, but you can at any time switch to video chat by clicking on the button *Audio/Video*.



The dialog must be maximized to be able to use video. You can only have one video chat with one person at the time. It is only the agent who can start a video chat. The visitor can start the video chat after this.

Vergic Engage has two different solutions for Videochat. One is thru Adobe Flash player and the other is RTC.

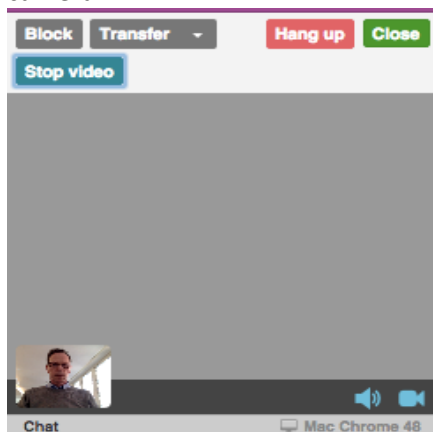
Adobe Flash player

When you have clicked on the Audio/video button. Adobe Flash player will then ask if you would allow access to your camera. The button for turning off either the video or the microphone is seen below.



RTC

For the RTC video, you just click start video and the video stream will be launched. You will be asked permission to access your camera.

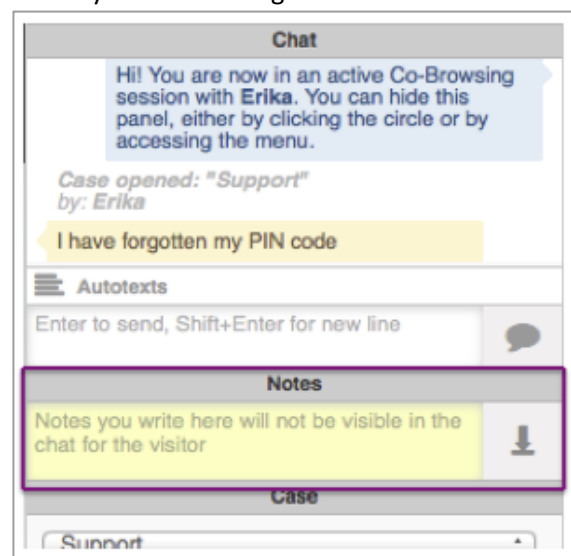


6.6 Spellcheck

For spellcheck to be activated when you chat make sure that the spellchecking function is activated in your browser (see Firefox or Chrome help section).

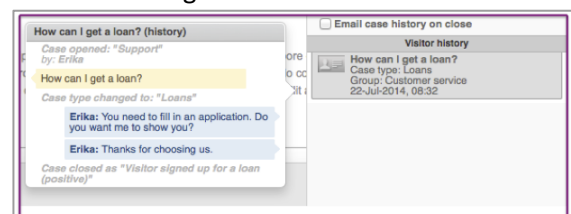
6.7 Notes

You can take notes during an active dialog. Notes are not visible for the visitor. To take notes click on the notes section in the dialog window, which is located just below the chat section. Notes are not visible for the visitor whom you are chatting with.



6.8 Visitor history

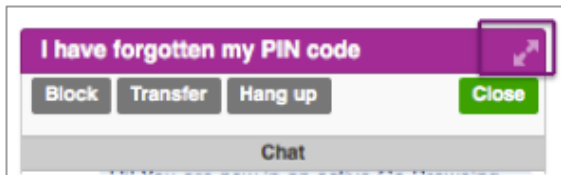
The visitors dialog history is available when handling returning visitors but only if the visitor has not cleared its browser cache since its last visit. The history section is located below the chat box and will automatically be populated with dialog history items if there are any available. Click on the items to see historical dialog information of this visitor.



7 Visual guidance

7.1 Co-browsing

To start visual guidance/co-browsing the agent need to maximize the dialog window. This is done by clicking on the double arrow icon in the upper right corner of the dialog window.

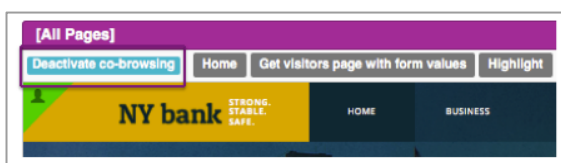


In the maximized dialog window/screen the agent can see a reflection of the website that the visitor is currently at. The agent can directly navigate the visitor by clicking in the window for visual guidance. When navigating inside the visual guidance window the visitor will be moved automatically along with the agent.

Every time the visitor navigates during the dialog the agent's visual guidance window will automatically update to reflect the visitors current webpage.

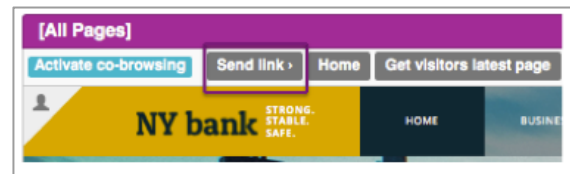
7.2 Deactivate co-browsing

It is possible to deactivate the visual guidance function so that the visitor won't be affected when the agent clicks inside of the visual guidance window. To do this click on the button "Deactivate co-browsing".

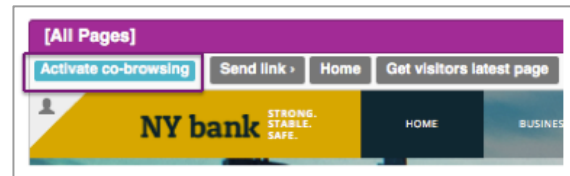


You can now navigate to different places without disturbing the visitor with a lot of page loads.

When the agent has found the correct page the agent can click on "Send link>". The visitor will be moved to the chosen page and will also receive the link in the dialog window.

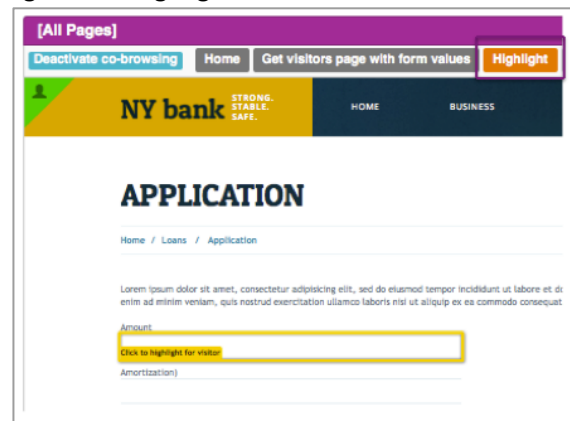


The agent can also choose to click on the button "Activate co-browsing", and the visitor will be moved to the correct page.

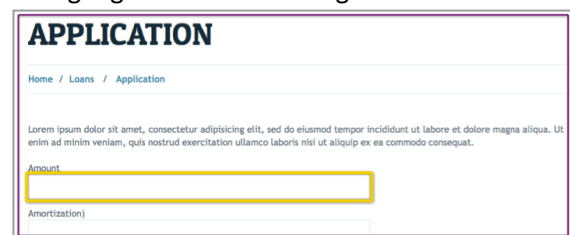


7.3 Highlight form fields

To make it easier for the visitor to know which fields he/she should pay attention to, the agent can highlight the fields.



To highlight a field click on the button *Highlight*. Then click on the field that should be highlighted in the visual guidance window.



The field that is highlighted will get a yellow border in the visitor's browser.

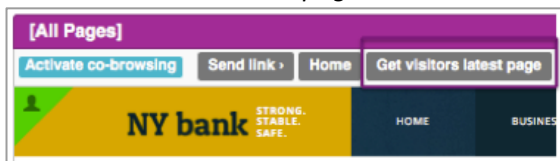
7.4 Get page with form values

By clicking on the button "Get visitors page with form values" you will retrieve the information that the visitor has typed into the form. You need to actively click on the button to retrieve the form values continuously. There is no auto update.



7.5 Get the visitors current page

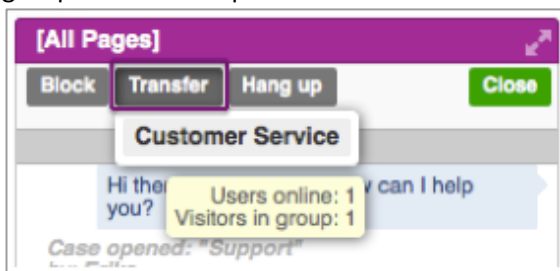
If you have deactivated co-browsing and the visitor continued to navigate throughout the webpage, then you might need to know the visitors location before you move him/her. Click on *Get visitor latest page*.



You will then see the visitor's current page, first ask if you can move the visitor, find the page and then click on *Send link*.

8 Transfer dialogs

If you have multiple competence groups configured it is possible to transfer dialogs between competence groups. Click on *Transfer* and choose the new competence group from the drop down list.

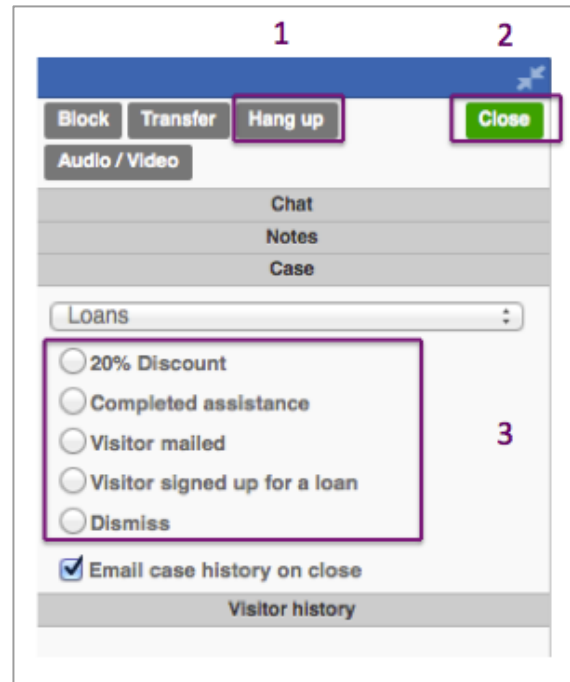


The visitor will be moved back to the queue but in a new competence group's queue and a new agent with the right competence will be able to pick him up.

Before you choose to do a transfer it can be a good idea to write a note in the dialog that describes why you transfer this visitor.

9 End Dialog

Click on the button "*Hang up*" to end the dialog with the visitor. Once the "*Hang up*" button has been pressed the dialog will end from the visitor side and the dialog history will be shown. (1)



Hang up does not close the dialog window, before you can close the dialog window you will need to choose a close option. Select one of the radio buttons available to choose a close option. (3)

Once the close option has been chosen, click on the button "*Close*" to completely close the dialog window. (2)

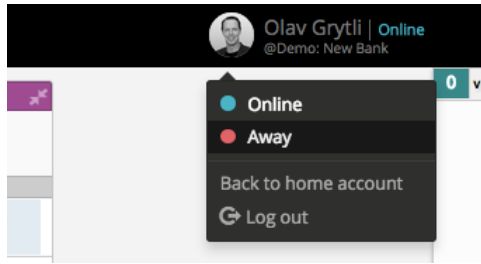
10 Pause queue

An agent can temporarily pause her/his queue.

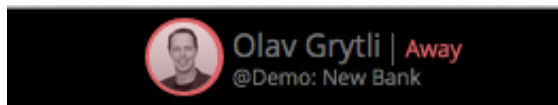
When an agent chooses to take a break the agent must first finish the on-going dialogs or make a *Transfer* back to the queue so another agent can continue the dialogs.

Not all agents should not take a break at the same time. There should always be someone who supervises the queue.

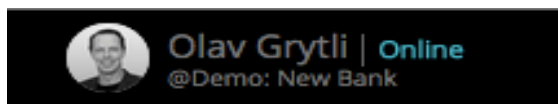
To create a break the agent has to change his/her status to Away in the upper right corner of the screen.



Paus/away status



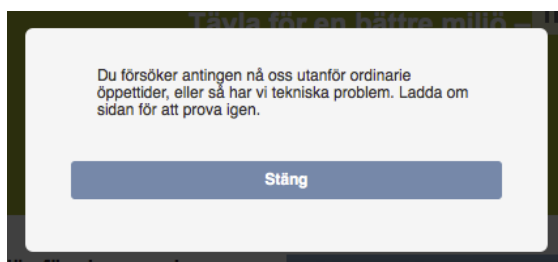
To start working with the queue again the agent needs to change the status to Online.



This functionality also enables the possibility for a sole agent that needs to logout outside the openings hours. The agent can change their status to pause/away. That means that no more visitors can get into the queue. The agent can finish working with the queue she/he has. When the queue is empty the agent can click on log out.

By doing this, the agent does not have to "throw" any visitors out from the queue.

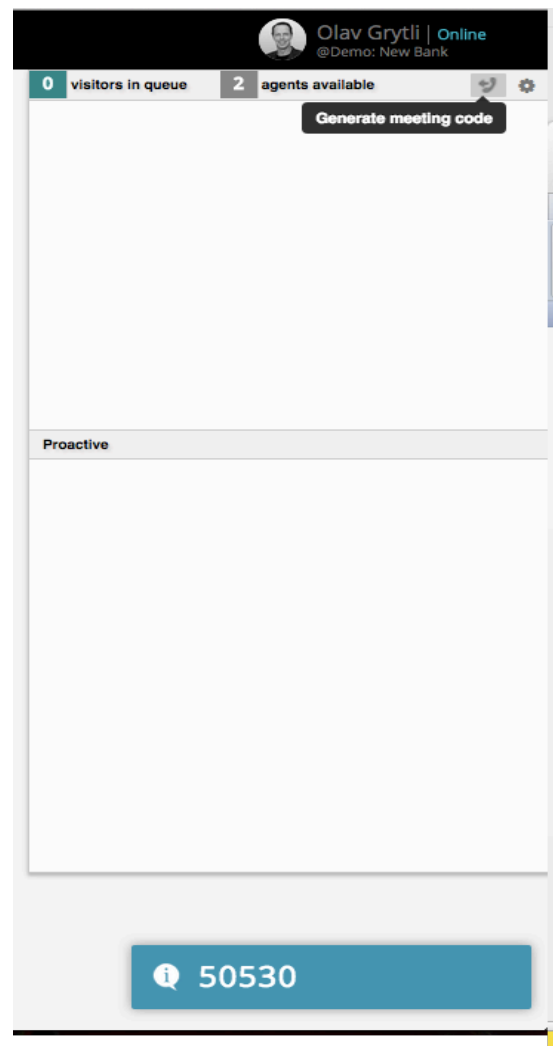
It's worth mentioning that if Pause/away is used by a single agent who is the only one logged in, then the banners will be visible to visitors until they reload the page. If such a visitor is in the queue, they will receive the following message.



The visitor will have to click on close, reload the page and then the visitor won't have the possibility to get into queue.

11 Phone2web

Phone2web is an additional service from Vergic Engage which makes it possible to utilize all the features of Vergic during regular phone calls. The agent generates a one-time code in Vergic that will link customer service and the customer together. This code can be conveyed from the agent to the visitor via email or phone call. When the visitor receives the code, he/she may enter this code at the website and get into direct contact with the agent who sent the code. If this happens during the phone it can then be supported by, for example, visual guidance, filling out forms, etc.



To generate a code the agent clicks in the fold out menu to the right on the Phone2Web symbol. The 5-digit code is rendered in the bottom right corner of the screen. The code is valid for 2 minutes.

12 How did the visitor end up in the chat?

In this chapter we'll describe Vergic Engage from the visitor's perspective and how the visitor is offered assistance and the underlying mechanisms.

12.1 Behavior and profiling

Vergic Engage uses a patented algorithm that identifies visitors that seem to be in need of assistance. This is done in real time and each visitor's behavior on the website is monitored. The filtering is dynamic and based on a parametric scoring system where different scores are leading up to the point where the visitor is being offered assistance, displaying interaction points such as contact banners or buttons that automatically appear on the web page.

Vergic Engage also offers the possibility of automatic real time segmentation of visitors based on whether the visitor shows interest e.g. in a specific product or service. It also offers the possibility to automatically assigning visitors to different competence groups working with Vergic Engage so that the visitor receives the most relevant assistance.

Filtering and segmentation is used in order to determine which visitors should proactively be contacted. Visitors can also receive assistance on their own initiative, which is called reactive. The visitor will then be offered this through different dynamic interaction points. The interaction points are strategically placed where the visitor normally needs assistance and are customized to the situation in terms of size, exposure, and placement with a message that matches the situation. The exposure also takes account of the current workload on customer service.

12.2 Contact banners

All visible parts of the contact banners and chat panels can be adapted to the graphic profile, the design and look and feel of the website. The contact banners can be divided into different types.



13 Agent skills and communication style

Vergic Engage is a platform that offers all the necessary functions and options needed to service the visitors on the website with a personal online chat. Regardless of this it's the agent's competence and communication styles that is critical in order to help the visitor successfully. This translates into some key practices like the tone of voice and the ability to adapt to the visitor. In this chapter we'll highlight some do's and don'ts in order to achieve best-in-class online customer service.

Worth noting

67% of all shoppers with a previous chat experience continue to actively seek chat options on merchant websites.¹

77% of the chat users agrees that the new interaction method influences their attitude in a positive way toward the retailer they were considering buying from.²

63% of the respondents reported they were more likely to return to a website after experiencing live chat.³

38% have stated they purchased from the e-commerce website as a direct result of the chat session itself.⁴

13.1 Best practice – Best-in-class customer satisfaction

Research show that there are some practices that are more important than others in order to achieve best-in-class customer satisfaction. These are:

Average Response Time (ART)

Average response time refers to the time between customer questions and agent

responses. The customer expectation is real-time response. For the ideal chat session, responses were provided within 30 seconds.

Expectation setting

Expectation setting focused on whether or not the agent gave an estimated wait time for delayed responses.

Accuracy of response

Response accuracy is paramount to ensure customer satisfaction and maintain the overall integrity of the brand. For benchmarking purposes, chat transcripts were analyzed for inaccurate, conflicting or confusing information.

Direct objective responses

Best-in-class chat responses directly answered customer questions, included only one or two ideas per response, and avoided promotional copy.

Conversation flow

Customers expect a personalized, brand-appropriate experience, even when using online chat. Ideal online chat conversations needed to flow with the appropriate use of pre-defined versus free form responses.

Patience

Questions should be resolved accurately while the agents goal is to keep the dialog short. However agents should not rush a chat session to hit efficiency metrics.

13.2 Tone of voice

Another important factor that is directly linked to the outcome of the dialog is the tone of voice. Research shows that the factors below have a major impact.

¹ Bold Software Survey (2010)

² Bold Software Survey (2010)

³ e.Marketer.com Survey (2009)

⁴ e.Marketer.com Survey (2009)

Conciseness and sticking to the point

Limit the number of words per sentence to reduce confusion and directly respond to prior customers questions.

Grammar, spelling and sentence structure

Use most grammatical rules, including capitalization and punctuation. Spell accurately to support credibility of the agent. Put critical content at the beginning of your responses. Put formal responses in complete sentences while less formal responses can be sentence fragments.

Voice and tone

Conform to the personality of the site (e.g. informative, professional and innovative). The tone should express the mood or feeling of the voice (e.g. friendly, upbeat and conversational).

Terminology

Use language that has mass appeal. Avoid slang, clichés and other references that are specific to a region. It can be used if customer starts using it!

Personalization

Use customer name and other customer information if available.

Grammar rules for chat

1. Use periods at the end of complete sentences, and question marks after direct questions.
2. Watch the built-in spell-checker and fix spelling mistakes.
3. Capitalize the first word of a sentence, proper nouns, and the first word of a salutation/closing.

4. Use a comma plus a simple conjunction (and, but, for, nor, yet, or, so) to connect two independent clauses.
5. Use active voice.
6. Use acronyms (e.g. btw, fyi, asap but also tnX/thX, b4, lol or smileys) with care and make sure you know and follow the company policy.

13.3 Trust and lust – things to consider

Understanding the visitor and what mood he/she is in and what he/she feels right now and adapting the dialog to this is key in order to achieve a great customer experience. Consider the questions below and how they affect the customer but also you as an agent and how you need to relate to them in order to achieve a successful and positive chat.

1. What mood is the customer in?
2. Is he/she frustrated? - Provide clear, straight answers and facts and to solve the problem.
3. Why is the customer visiting your website? Inspiration, gathering facts, wanting to buy something, something else?
4. How is your experience with other channels and how can you transfer that knowledge into this chat?

Consider the following scenarios and think about how you would act handling these visitors in a chat:

1. Confused visitors in need of guidance and help to find the information on the website.
2. Visitors in need of help to get in contact with support.
3. Help a visitor who leaves an ongoing process, e.g. checkout in e-commerce.
4. Ensure that the customer understands what he or she has ordered.