



Setting up Live Chat: Customer Experience Matters for Live Chat and Telephone Teams

Contents

Introduction	4
Best Practices for Adding Live Chat to Your Website	4
Ensure Proper Visibility of Live Chat	4
Make Live Chat Universally Available Across Your Website	6
Build Mobile-Friendly Live Chat	7
Use Proactive Chat Wisely.....	7
Create Different Live Chat Designs for Different Websites	9
Use Dedicated Chat Buttons for Particular Agents/Teams.....	9
What Does Your Chat Window Say About You? Tips and Best Practices for Customizing Your Live Chat Window	10
Color Your Live Chat Window to Match or Complement Your Brand	11
Agent Avatar versus Banner Image.....	14
Make Use of Either the Embedded or Pop-up Chat Window	17
Customize Live Chat Window Style on Mobile Devices	20
Set and Enable Sound Alerts to Keep Customers Focused	22
Leverage the Power of Pre-Chat Survey: Tips and Best Practices	22
What Is a Pre-Chat Survey?.....	23
To Pre-Chat or Not to Pre-Chat.....	23
What to Ask for	24

Avoid the Scroll Bar	24
Make a Powerful First Impression	25
Pre-Chat Surveys as an Automated Switchboard	25
Pre-Chat Surveys as a Data Gathering Tool	26
Pre-Chat Surveys as a Personalization Tool	27
The Importance of Trial and Error.....	28
Leverage the Power of Post-Chat Survey: Tips and Best Practices	28
What Is a Post-Chat Survey?	29
Post-Chat Survey Benefits	29
Choosing the Right Post-Chat Survey Format	30
Strengthen Your Brand Reputation with Post-Chat Surveys	32
The Advantages of Post-Chat Reports	33
The Importance of Trial and Error.....	34
Proactive Chat Best Practices with Ready-to-Use Scripts.....	35
What Is Proactive Chat?	35
Whom to Engage? Common Scenarios and Metrics.....	36
Repeat/Return Visitors.....	37
Visitors from Certain Geographic Locations	38
Upselling/Cross-Selling Opportunities	39
Pages with High Bounce/Exit Rate	40

The FAQ Lurker	41
The Product Pages.....	42
The Referral Page	43
What Not to Do in Proactive Chat.....	44
Plan, Benchmark, Implement and Optimize!	45
Conclusion	46
About Comm100.....	47
Customers	47
Accreditations	47
Contact Us	47

Introduction

Each phase of live chat implementation is equally important. From investing in live chat, to setting up live chat, to having a successful live chat process down the road, each part of the journey is a step towards the same goal: providing accessible, quality support for your customers and visitors. To do this, it is necessary to keep in mind the importance of the customer experience.

The process of setting up live chat is all about the customer experience. In this eBook, we will discuss how you can best set up your live chat in order to optimize that experience. This means sharing our best practices for each of the following:

- Adding live chat to your website
- Customizing your live chat window
- Making use of the pre-chat window
- Making use of the post-chat window
- Implementing proactive chat

With these best practices, you will be well on your way to setting up a successful live chat experience, and creating success for your company.

Best Practices for Adding Live Chat to Your Website

After you have purchased your live chat solution, the next step is to add live chat to your website and start engaging with your customers. But what are some live chat best practices that you can employ when making this transition? Whether you are new to live chat, or are looking for new ways to add live chat to your website for better ROI, you can find options here that work for your business.

Ensure Proper Visibility of Live Chat

The visibility of your live chat feature should depend on your company's communication strategy. Let's compare these two different business models, and see how the visibility of their live chat positively impacts each one.

Model One:

Jim has an online clothing store, which offers hundreds of merchandise options to his customers. To ensure that his customers are getting the support that they need, Jim adds live chat to his website. Because he introduced a very visible live chat presence, Jim's customers can now easily contact a representative with doubts or questions about an item. This strategy has resulted in more sales, and works wonderfully for Jim.

For businesses like Jim's that encourage online engagement with customers, it is important to use practices that facilitate this communication when you add live chat to your website. One way to do this is to create a chat button that stands out, so that visitors can spot it easily when they need help. This can be accomplished several ways, such as:

- Giving the chat button a vibrant color
- Making the live chat button float on the website
- Adding animation to the live chat button
- Using an eye-catching image as a chat button

When you create a prominent chat button, make sure that it is harmonious with the look and feel of your website, in order to avoid the risk of irritating visitors or sacrificing the consistency of website flow. This means the color of the button shouldn't be too loud, the size shouldn't be too big, and the position of the button should not get in the way of your website content.

There are companies, however, that prefer to add live chat to their website in a less conspicuous manner. Check out how this is done in the model below:

Model Two:

Diana's company sells cybersecurity software for commercial use. Her website features an easily accessible, robust knowledge-based system, which covers almost all frequently asked questions. Because she has limited support staff, Diana has set up her website in a way that encourages customer use of that system rather than immediate reliance on live chat. So instead of boasting a large chat button, her live chat has a subtler presence on her website, and can be found as a text link on her contact page.

Depending on what works best for you, you may want to use Diana's approach and keep your live chat feature low-key. When you add live chat to your website following this example, it is still important that

your live chat be findable. This will help you avoid frustrating customers who want to engage in live chat.

Make Live Chat Universally Available Across Your Website

Reach More Visitors

Making live chat universally available across your website is great for e-commerce companies like Jim's, which encourages more visitor interaction. When you universally add live chat to your website, customers can ask for help anytime, anywhere, without having to leave their current webpage. Let's explore this from a customer perspective:

Chelsea is shopping for lipstick online. After 15 minutes of browsing, she finds a lipstick with great reviews. One thing is standing in her way of purchasing: based on the product photo, she isn't sure if the color of this particular lipstick is more red or purple. Luckily for Chelsea, the company that she is browsing with offers live chat universally across their website. This means that Chelsea doesn't have to go through the extra effort of searching for the live chat option, which could possibly lead to her losing interest in the product. She initiates a live chat session with a representative and clears up her doubts up quickly and easily.

Having live chat on all webpages means that visitors like Chelsea can access help from a customer service representative effortlessly, thus increasing their confidence in your company and reducing the likelihood of shopping cart abandonment. By increasing engagement opportunities with this good live chat practice, you can generate more leads and ultimately more customers.

While this worked out great for Chelsea, this practice may not work for all businesses, such as the ones that prefer a less conspicuous live chat presence, or ones that plan to add live chat to their website under a specific page, such as "Contact Us". Some companies may even want to make live chat gated so that only users with certain privileges or account types have access to live chat.

When deciding whether to universally add live chat to your website, consider what your company hopes to accomplish with your live chat feature, and what sort of experience you want to create for your visitors.

Build Mobile-Friendly Live Chat

In this on-the-go day and age, more and more people are using smartphones and tablets as a primary means of connecting online. As a result, it is increasingly important that when you add live chat to your website, it's also accessible and easy to use on mobile devices.

Responsive Design

When viewing a website on a mobile device, chances are it will look different than it does from your computer screen. The original chat button and chat window that were designed to fit your desktop browser might take up too much space on a smartphone, making it difficult to navigate your mobile website.

This is why [responsive design of your live chat](#) is essential to an optimized mobile presence. Responsive design means that your live chat is automatically adjusted in size and layout with full mobile compatibility when visitors access your website through mobile devices. This improves your business' mobile presence, and enhances your visitors' live chat experience on smartphones and tablets.

In-App Chat

One important tool in this mobile era is the mobile app. Silently, mobile apps are changing the world, and changing businesses. Instead of booking seats, watching videos, paying bills, etc. from a computer, more and more people are now performing these functions through mobile apps. The result is many companies adding in-app chats to their mobile apps.

With this live chat good practice, users can contact customer service teams inside the company's app instead of going to the website to search for the chat button. Adding in-app chat to mobile apps can be easily accomplished through developer-friendly SDK. With the creation of mobile-friendly live chat, your customers will be able to count on your customer service on the go—anytime, anywhere.

Use Proactive Chat Wisely

Proactive chat can be especially beneficial on e-commerce websites, where a visiting customer is browsing to buy. A visitor who has a doubt about a product and receives a proactive message is more likely to make a purchase than a visitor who hasn't. When you add proactive live chat to your website, you also instill a sense of confidence in your visitors, as it reveals an active commitment to communication between your company and its customers.

While proactive chat is a great tool to increase chat engagement, it can also ruin visitors' experiences if not used properly. Visitors may feel intruded upon and annoyed by proactive chats that are too repetitive, too generic or robotic, or get in the way of reading the content on your website. This can negatively interfere with the visitors' buying experience, instead of making it easier and more harmonious.

Plan Your Automated Chat Rules

To avoid irritating customers, proactive chat requests should be based on research and analysis of the customer base, and should be sent out at the right time, in the right location, and with the right message, especially when automated.

When setting rules to add proactive live chat to your website, pay attention to the following:

- Customer time on site
- Current location
- Navigation history (or footprint)

For example, you can set your rules so that your proactive chat invitations get sent out automatically to customers who have more than \$100 worth of merchandise in their shopping carts and have spent more than 15 minutes on the check-out page. By setting proactive automated chat rules, you can more efficiently contact target visitors who are most likely to become customers, which ensures that no single targeted visitor is missed.

Reference Proactive Chat Reports

The best thing that you can do to optimize the effectiveness of proactive live chat is to use the [report of proactive chats](#) to optimize your strategy. You can review the report of one specific proactive chat, or of all proactive chats as a whole, focusing on [metrics](#) such as the number of proactive chats sent to visitors, the number of proactive chats accepted by visitors, and the percentage of proactive chats that have been accepted by visitors.

By reviewing these elements, you will know whether your [proactive chat strategy](#) is working the way you intend it to, and can make any necessary changes in order to optimize it. This good live chat practice will help you communicate with the right customers when they most need it.

Create Different Live Chat Designs for Different Websites

Distinctive Live Chat Appearance

If you have separate websites for different businesses, you can create a distinctive live chat appearance for each site. This means using styles, language, position, and other elements in a way that that best suits your individual websites, to ensure smoothness and unique chat experiences on all sites.

Unique Chat Processes

If you have different workflows for different websites, you can also implement different chat processes on each site. These processes include collecting separate visitor info, and creating distinct proactive chat rules, chat routing rules, and more.

Separate Reports

When you add live chat to your website, your chat agents can conveniently monitor and handle chats from all websites in one single chat console. At the end of the day, each website will have its own chat report and offline messages inbox. By analyzing each report individually, you will be able to understand how your different websites are performing.

Use Dedicated Chat Buttons for Particular Agents/Teams

With some customer service models, your customers may need to reach out to a specific agent or team for help. In this case, it can be very beneficial to add live chat to your website using designated chat buttons for specific agents or teams. For example, if your customers have a specific account manager that they need to contact, you can create one chat button for each agent and display these buttons on the same page so that visitors can find the right agent. This creates a sense of ease and intimacy.

Agent-Specific Chat Buttons

Best Buy utilizes this good live chat practice with its [Geek Squad](#). On their website, you can click the “Get Support Now” button to chat with any available agent, or you can see a list of online agents and their profiles and select who you want to chat with. These profiles showcase a photo of the chat agent, their username, satisfaction rate, the languages they speak, and how many cases they have taken. Each agent even has a summary that you can access, where they introduce themselves to customers and talk a little bit about their experience.

Team-Specific Chat Buttons

[Sprint's live chat](#) also uses designated live chat buttons, but their chat options connect you to different teams, rather than different agents. From their live chat page, you can click a “Chat Now” button to connect independently to sales, order support, account changes, international help, and personal inquiries.

When you add live chat to your website using dedicated chat buttons, customers who have had a good experience with a particular live chat agent can easily reconnect with that agent in the future, which helps forge good relationships between customers and your agents. Customers can also benefit by connecting with the right agent or team quickly, instead of being transferred from agent to agent. For example, if a customer needs assistance making a purchase, by clicking on the sales button, he or she will be able to chat directly with the sales team, not technical support. This ensures faster resolution of customer issues, which in the end helps create customer loyalty. You can also choose to auto-allocate each customer to the last chatted agent, an option which is available under the auto-accept chat mode.

What Does Your Chat Window Say About You? Tips and Best Practices for Customizing Your Live Chat Window

Let's say that live chat is a journey. You are a customer who is trying to get from Point A, an issue or inquiry, to Point B, a resolution or answer. You've pushed the live chat button—now through what means will you arrive at your destination?

The live chat window is the vehicle that transports customers or website visitors to the answer or resolution that they seek. In other words, it the platform that will ultimately carry them to their final destination: satisfaction. Without a chat window, there would be no live chat. This makes it a vital part of the live chat experience.

Although we may think of the live chat window as the space where we actively message a company's online agent, the live chat window is in fact much more than that. A live chat window is any window through which your website visitors can interact or communicate with your company. The windows where visitors can fill out a pre-chat form, leave an offline message, and rate your company's live chat service are all also live chat windows.

By following the tips and best practices laid out below, you can make sure that your live chat window—like any good customer service vehicle—is professional, attractive, and functional.

Color Your Live Chat Window to Match or Complement Your Brand

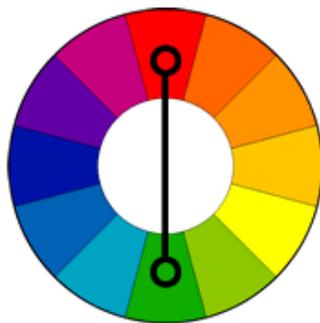
Choosing the right color for your live chat window is important to the impression that it makes on your website visitors. But why is color so important?

The importance of color in design stems from the [significance of color](#) to the human mind. Color is used every day to create ideas, express messages, spark interests, and generate a variety of emotions.

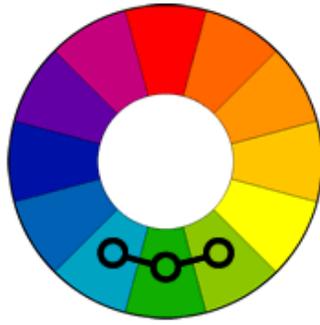
Choosing colors for your live chat window is not about just choosing your favorite colors. Just like when designing your website, the colors chosen for your chat window should coincide with and strengthen your brand's image. Use the wrong combination of colors and your live chat window may look unprofessional at best, or like an untrustworthy junk advertisement window at worst.

Here are some of the color schemes we recommend that you consider when designing your live chat window:

- **Complementary colors:** These are colors opposite one another on the color wheel. The contrast of complementary colors creates a vibrant look. Designing a live chat window whose colors are complementary to your website or brand's colors is a great way to draw attention to the window.



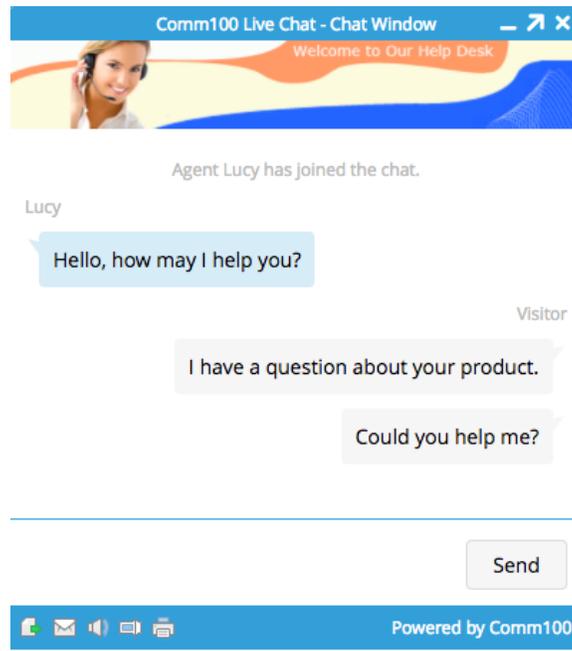
- **Analogous colors:** This color scheme involves colors that are next to each other on the color wheel. This usually creates serene and comfortable designs.



- **Monochromatic:** Colors that work well individually may not be as pleasing together as they are by themselves. By using one color, or the combination of one color and neutral colors like black or white, you can create a professional, clean look.



To see how color impacts a live chat window, check out for example the example below:



For this live chat window, blue is the main color that is being used. In the banner image, the company has included a slight streak of orange, the complement of blue, which gives the chat window a vibrant and appealing aesthetic. This chat window contains its company’s brand colors, which are white and blue, and the orange gives the window an added visual appeal without losing professionalism or brand likeness.

When you go to design your own live chat window, remember:

Do:

- Use colors that make your live chat window a seamless part of your brand’s identity. This means using your brand’s colors, or basing your live chat window colors off of your brand’s colors. This will give your chat window a cohesive, professional feeling, and will let your customer know that they are on the right page.
- Use complementary colors to add visual interest to your chat window and encourage visitor engagement. Make sure the complements are not too strong or visually unpleasant.
- If you would rather give your live chat window a more neutral feel, try using one of your brand’s colors in conjunction with colors such as white, grey, or black.

- Keep the amount of colors used in your live chat window to a minimum in order to avoid confusion or a sense of busyness.

Don't:

- Use colors that are too loud or hard on the eyes.
- Don't use a text color that is too bright or too similar to the window color to avoid making your text hard to read. If you make proactive chat requests, this could give your window a spam-like feel, which will lead to less chats being accepted.

Agent Avatar versus Banner Image

There are two common practices for customizing your live chat window: using an agent avatar and company logo, or creating a banner image. But how do you know which to use? Let's explore each of these two practices now:

Banner Image

Although a banner image is not a necessary part of the live chat window, it is a visual element that can enhance the overall appearance of the chat window. A banner image can consist of a variety of elements, such as the company's logo, a stock photo of a customer service agent, welcome text, or any other combination of elements that your company seems fit. The banner image is entirely customizable, which makes it an extremely versatile element of the live chat window. This is a great option if you have a designer or a team of designers to create this image for you. It is also great to use a banner image if you want to incorporate your company's slogan, or other text which cannot be used in conjunction with the agent avatar.

In order to design a successful banner image, we recommend that you try and abide by the practices laid out below:

Do:

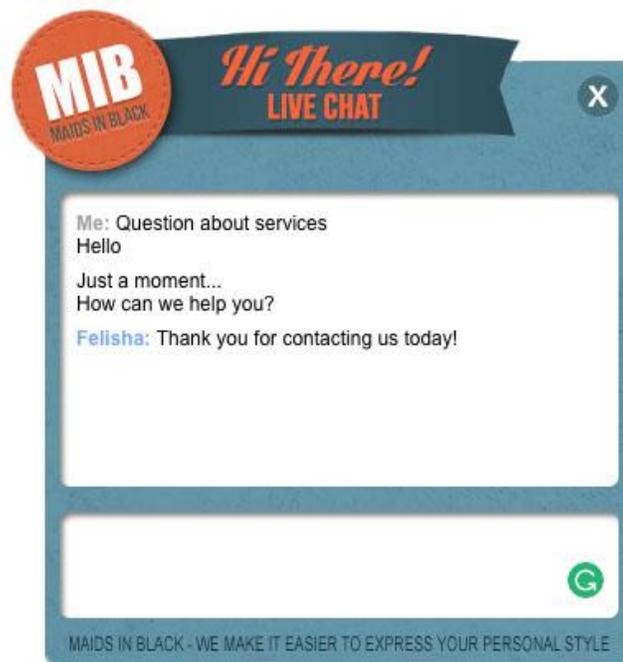
- When designing your banner image, be sure to create an image that follows the principles of good design. This means creating an image that has the following:
 - **Balance** - Good distribution of elements such as images, colors, and space.
 - **Unity** - A sense of harmony between all parts.

- **Color** - Make sure that the color(s) in the banner image relate directly to or go with the colors in the chat window.
- **Movement** - The banner guides the visitor's eye upwards, and to focal areas along the image, such as your company's name or logo design).

Don't:

- Don't create a design that is cluttered.
- Don't design a banner image that has little to do with your brand image.
- Don't create a banner image that has nothing in common or contrasts too sharply with the rest of the live chat window

Below is an example of a successful banner image, which is used by the cleaning service company, [Maids in Black](#):



The design for this banner image is simple and clean. The banner's colors are cohesive with the colors used in the rest of the chat window, and the burnt sienna creates a visual contrast against the dark blue. The text used in the banner functions well as a friendly greeting, while also incorporating the brand's

logo. To top it all off, this banner uses different shapes, which create movement and make this design unique. The visitor's eyes start out at the circular logo, and move out towards the greeting, or visa-versa.

Agent Avatar

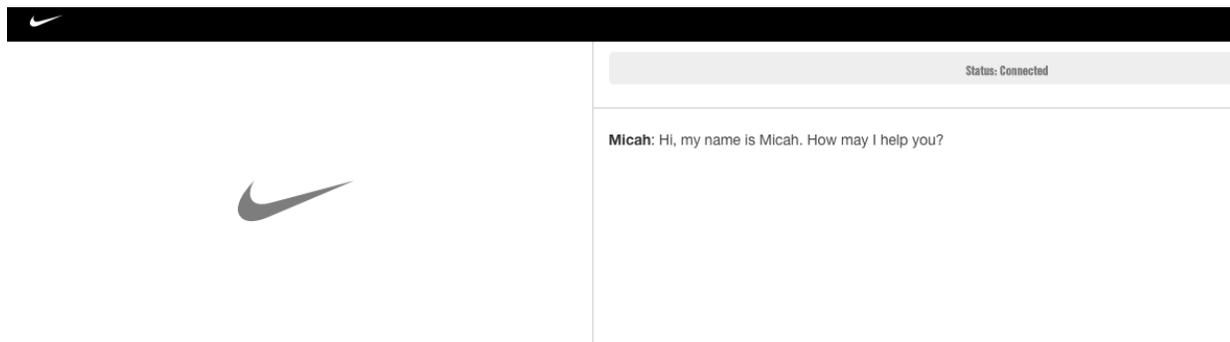
If you don't want to use a banner image, you can instead opt to upload your company logo and agent avatar to the live chat window.

Using an agent avatar gives your live chat experience a more intimate feel, as your visitor can see who they are talking to. This is great for business that have specialized live chat agents, or who have their customers communicate with a specific account manager.

Some companies will opt to either use an agent avatar or their company logo, rather than enabling both options. Take Best Buy's [Geek Squad](#) for example. Because the Geek Squad is a team of technology experts, their live chat experience aims to humanize their agents, so that visitors feel like their issue is in a real, accountable person's expert hands. This is done so well that the company doesn't even need to have the Geek Squad's logo on their live chat window—the live chat agents' avatars are representation enough of their brand to do the job.

The screenshot displays a live chat interface. On the left, a banner reads "ONLINE SUPPORT CHAT WITH AN AGENT" with a circular logo. Below the banner, there is a "GET SUPPORT NOW" button and some introductory text. The main chat window is titled "Agent Alex" and includes a "call agent" button. The chat history shows a message from "Agent Alex [09:10 AM]" that says: "Hi, thank you for using online support. This is Agent Alex. How can I assist you today?". Below the chat history is a text input field with the placeholder "Type your message here" and a send button. On the right side of the chat window, there are numbered steps: "1. CONNECT WITH AN AGENT", "2. GET DIAGNOSED", "3. PROVIDE PAYMENT", and "4. RELAX", each with a brief description of the step.

Nike on the other hand prefers to feature only their logo, rather than giving agents a substantial visual presence. This puts additional visual attention on their logo, which they have customized to be the largest visual element in their live chat window. Talk about driving the point home!



When featuring an agent avatar and your company logo rather than a banner image, take care to do the following:

Do:

- Use agent avatars that are clear, front-facing, and well-lit.
- Make sure that your agents are dressed appropriately in their avatar photo, and that each avatar reflects your company's professional image

Don't:

- Don't use avatars that are dark, pixilated, or that don't properly show who your agents are. This seems unprofessional, and defeats the purpose of using an agent avatar in the first place.

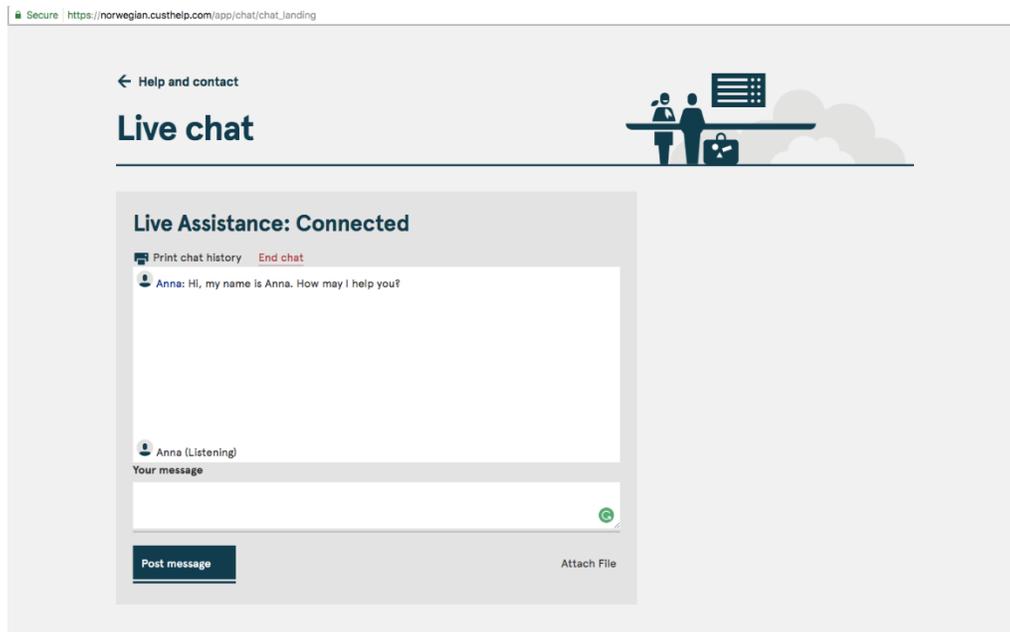
Make Use of Either the Embedded or Pop-up Chat Window

One good practice when designing your live chat experience is knowing whether to use an embedded or pop-up live chat window.

Pop-up Chat Window

This classic option is basically what it sounds like—when a customer clicks on your live chat button, the live chat window opens as a pop-up window, separate from and in front of the window from which you were navigating.

Many companies, such as [Norwegian Airlines](#), still use this approach. Norwegian's live chat window opens in the pop-up fashion, and in doing so, takes up the visitor's whole computer screen. The benefit to this is that it immediately becomes harder for the visitor to accidentally navigate away from the chat window. Another benefit is that the pop-up chat window demands more of the visitor's attention, making it harder for them to get distracted by another browser tab and forget about the chat window before an agent even answers. Norwegian Airlines even goes the extra mile with this approach, by automatically opening its live chat window in full-screen mode. This type of window is also very popular as far as a proactive chat window, given its attention-grabbing nature.



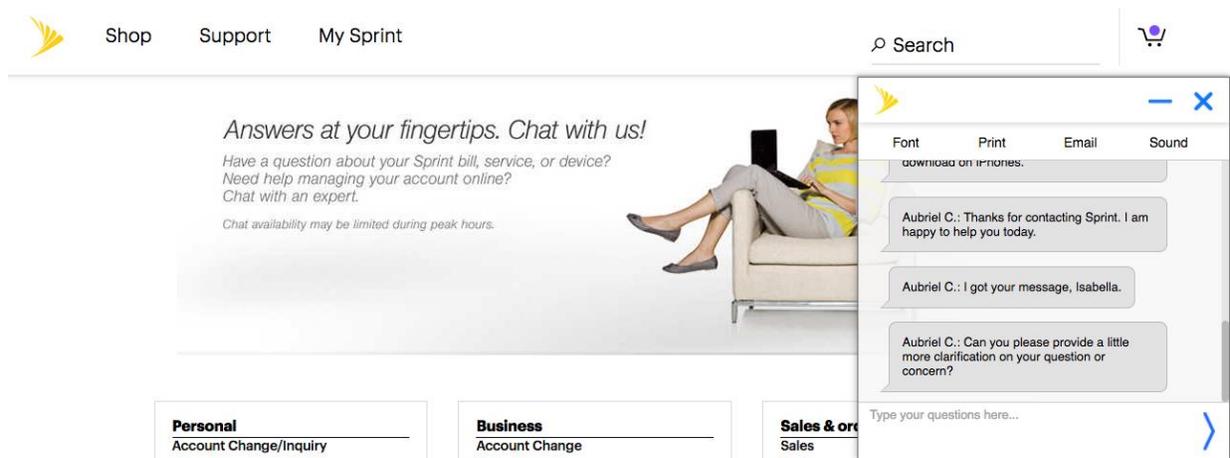
However, there are two heads to the same coin. The downside of the pop-up chat window is that pop-up chat windows are easily closable. If you are sending proactive chat messages using a pop-up chat window, customers may reflexively close the chat window as it appears over their current webpage. Another downfall is that because the live chat window pops up over the company's webpage, it can be difficult for customers to reference the page that they were looking at as they chat with agents. This may make it harder for customers to ask questions about a specific product.

Embedded Chat Window

The embedded chat window is a chat window that is built in to one of the extremities of the current webpage. This sort of chat window is commonly set to appear at the bottom right-hand corner of the webpage (you can also make it appear at the [bottom left](#)), and thus does not interfere with the visitors'

browsing activities. The embedded chat window is very similar to the set-up of Facebook’s instant messaging platform, and therefore is familiar to many users.

One company that makes use of the embedded chat window is [Sprint](#). Because the chat window appears as a part of the current webpage and not as a separate unit, visitors have the advantage of being able to browse Sprint’s products and plans while they wait for a response from an agent. If they want to reference a specific product or plan that they need help with, that is also easily done with this non-intrusive chat window option. This type of window also works great for proactive chat, since a customer has the option to minimize the window if they aren’t interested right when they receive the message, but they could be later.



The downside to this chatting method is that if a customer accidentally navigates away from the webpage mid-chat, the chat session will expire. This chat window’s more subdued nature also means that visitors who have initiated a chat might navigate to another webpage on a separate tab while waiting for an agent’s response, and forget about the chat session all together (note that this scenario is not fully preventable with the pop-up chat window either).

When choosing between an embedded and pop-up live chat window, we recommend the following best practices:

Do:

- Consider your company’s live chat goals and the purpose of your live chat when deciding which chat window style to implement. Is your visitor going to have to reference something important on the page that a pop-up live chat window might block? Or is it vital to try and interrupt the viewer’s other activities?

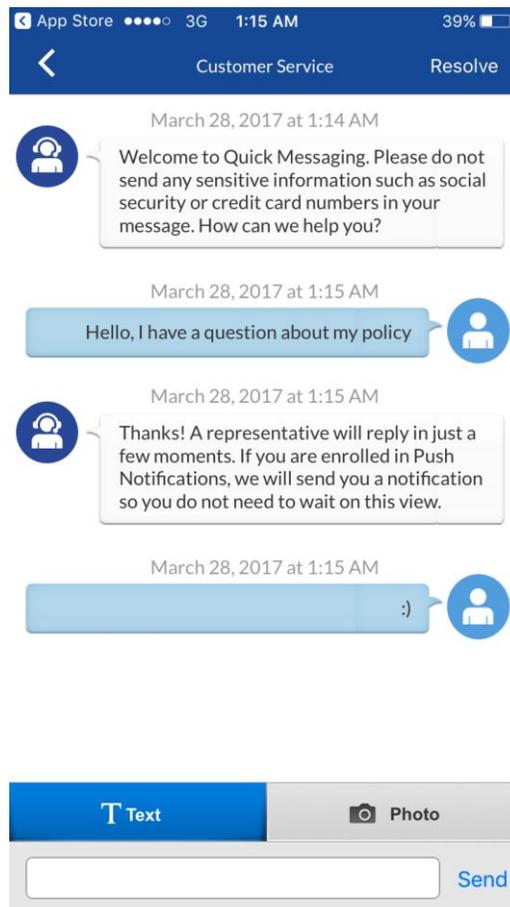
Don't:

- Don't go overboard with a pop-up chat window, especially if you are using it for proactive messaging—don't fall into the trap of having it function and look like an annoying pop-up ad.

Customize Live Chat Window Style on Mobile Devices

Nowadays, we have access to nearly everything on our mobile devices. When given the option, many of us opt to resolve customer issues online on the go with our mobile devices, rather than waiting to get home to our computers. This is why having a live chat window that is optimized for mobile devices is so important.

One company that has done a great job of optimizing their mobile live chat window is [Geico](#). Geico's mobile chat window is designed to take up the whole mobile screen, optimizing visibility of the text. The window has a simple, minimalistic design, which also makes clear communication easy on smaller, hand-held devices. This chat window is so user friendly that it is even integrated with push notifications, so that the customer receives a notification whenever the live chat representative has responded to a message.



Comm100's live chat window is automatically optimized for mobile platforms. However, you can use CSS customization to further [customize your chat window style on mobile devices](#).

Do:

- Use CSS mobile window customization options if you want to do the following to your mobile chat window:
 - Change the color of agents' messages
 - Change the size of the company logo
 - Change the color of the send button and other various buttons
 - Change the color of the window title

- Change the border color of the text or drop-down list fields in the pre-chat or post-chat surveys (if you have these elements enabled)

Don't:

- If you do decide to use CSS customization, don't forget to supervise it closely to eliminate any bugs or inconsistencies. CSS design is to make your live chat window even more of what you want it to be, so that's what it should do!

Set and Enable Sound Alerts to Keep Customers Focused

Some visitors may engage in a chat, and then switch to another window or tab while they wait for your response. Enabling sound alerts can be a great way to notify visitors of when an agent has responded to them.

Here are some best practices for enabling sound alerts:

Do:

- If you choose to enable sound alerts, take care to select a sound that will serve as a gentle reminder that the visitor is still in the conversation. This means selecting a neutral, short tone.

Don't:

- Don't use any sounds that may be annoying, jarring, or inappropriate. You don't want to provoke your customers, or for them to have to mute their computer to continue chatting with you.

Leverage the Power of Pre-Chat Survey: Tips and Best Practices

Just like phone support, live chat enables your visitors and customers to contact you directly for support in real time. The Internet offers much more anonymity than other contact methods, but by no means lessens the need for information when providing support or answering inquiries. You may need to obtain basic contact, account or other information before you can assist your user or visitor.

Of course, you could ask your visitor for required information during the chat. However, this takes time and can slow down the sales or support process. In some cases, obtaining required information before the chat takes place is much easier and efficient.

Next, we are going to discuss best practices for utilizing pre-chat surveys to kick-start a meaningful conversation with your website visitors, and explore various types of data collection methods in order to obtain the most relevant information that could be used to enhance the overall customer experience.

What Is a Pre-Chat Survey?

A pre-chat survey is a custom online form which visitors complete before engaging in a live chat session with an operator. The primary use of pre-chat surveys is to collect personal and/or account information (i.e. full name, phone number, email address, etc.), and to identify the customer inquiry type in order to determine which operator or department to automatically route the chat to.

The screenshot shows a web page with the Comm100 logo and a 'Products' dropdown menu. A 'Comm100 Live Chat - Pre-Chat Window' is overlaid on the right side. The window has a blue header with the Comm100 logo and the text '100% communication, 100% success'. Below the header, the text reads: 'Please provide us with the following details so that we may better assist you.' There are two social login buttons: 'Sign in with Facebook' and 'Sign in with Google+'. Below these is an 'Or' separator. The form contains three input fields: 'Name: [input field] *', 'Email: [input field] *', and 'Phone: [input field]'. The 'Name' field has a red asterisk and the word 'Required' below it. At the bottom of the form is a blue button labeled 'Start Chatting'.

To Pre-Chat or Not to Pre-Chat

Pre-chat surveys serve to provide your operators with valuable visitor information which in turn should result in efficient and personalized customer experiences. However, when you have other ways to identify who the visitor is before the chat starts, it is fair enough to skip the pre-chat survey. For

example, if a customer is already logged into their personal account on your website, it is not appropriate to request for their personal and/or account information in a pre-chat survey. Instead, you can use [custom variables](#) to automatically read such information from your website or account system and make it available to your operators as needed.

What to Ask for

For the pre-chat survey, you can ask for any information you deem relevant or helpful. The most commonly asked information among our customers includes:

- **Name, email, phone** – basic information to identify the visitor to personalize the service and to follow up later on.
- **Department, inquiry type** – further information you can use to have customers served by the most appropriate department or operator
- **Account #, order ID** – account or order information that can help you quickly and thus shorten the case resolution time.
- **Country, zip code** – sometimes visitors are supposed to be served by different operators per their geographic location.

You can always customize your own pre-chat survey based on your specific business scenarios, though.

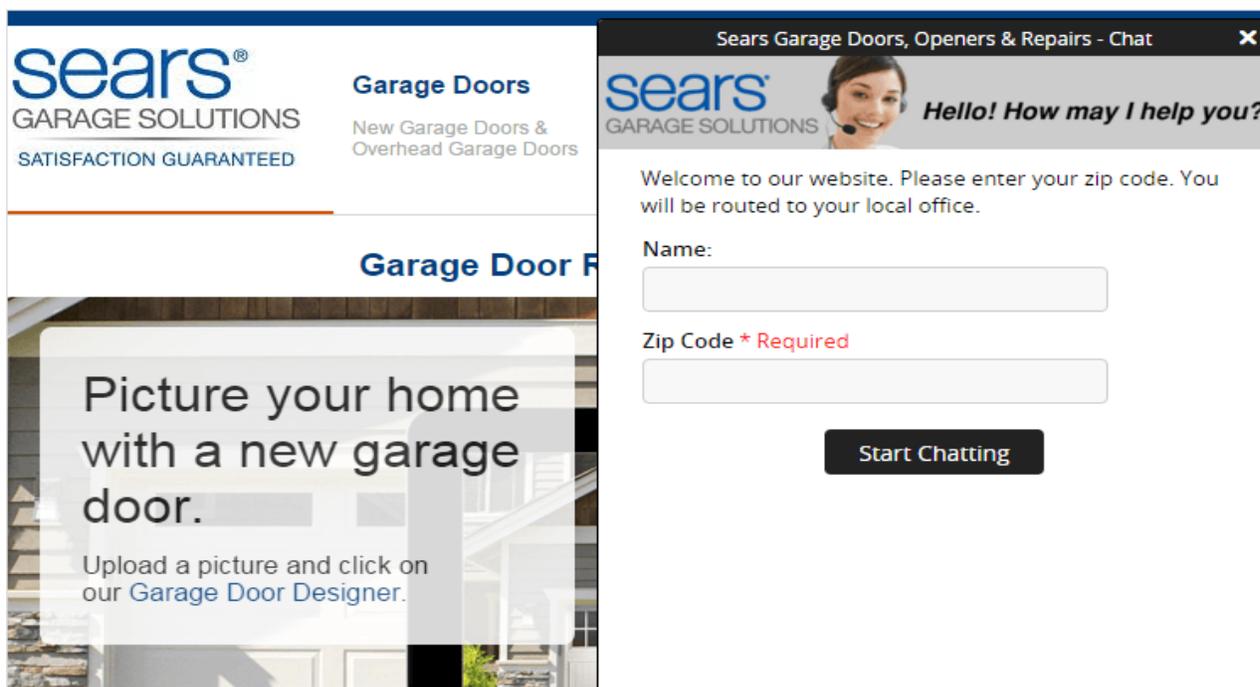
Avoid the Scroll Bar

The rule of thumb is that visitors should never have to utilize a scroll bar in order to view all the fields included in your pre-chat survey window. Visitors may perceive the pre-chat survey form as too overwhelming or time consuming when a scroll bar is present; as a result, you may risk losing your visitors before a live chat session can even be initiated. If your pre-chat survey form has resulted in a scroll bar, then it's an indication that you've included too many fields, and it's time to remove fields that are either extraneous or the least important.

Make a Powerful First Impression

If you do choose to utilize a pre-chat survey, remember that this is the first window your visitors will see. As such, it's important to ensure that your customers perceive a positive and professional image of your company.

You can easily customize the design of every aspect of your pre-chat window – banner, company logo, font, to name a few. More importantly, you should ensure that your pre-chat survey window complements the style, colors, and layout of your company website. The pre-chat survey window is an excellent opportunity to showcase and promote your company logo and motto when utilized to its maximum potential.



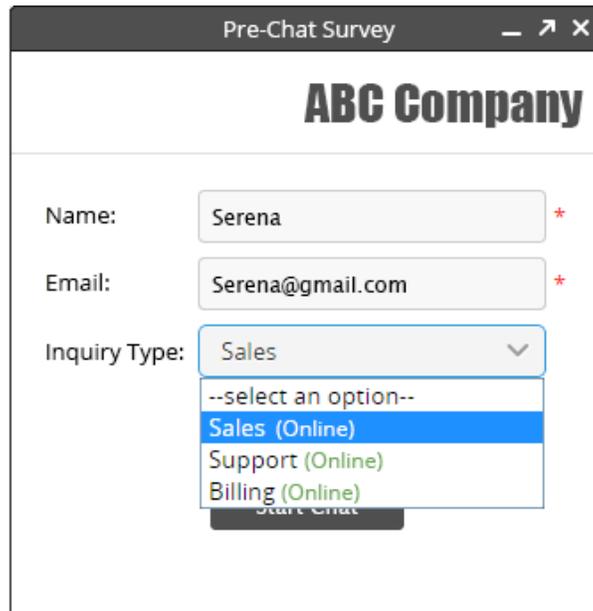
The image shows a pre-chat survey window for Sears Garage Solutions. The window has a dark header with the text "Sears Garage Doors, Openers & Repairs - Chat" and a close button. Below the header, there is a banner with the Sears logo and "GARAGE SOLUTIONS" text. To the right of the banner, it says "Hello! How may I help you?". Below the banner, there is a form with the following text: "Welcome to our website. Please enter your zip code. You will be routed to your local office." The form has two input fields: "Name:" and "Zip Code * Required". Below the form is a "Start Chatting" button. The background of the window shows a website banner for "Garage Door Designer" with the text "Picture your home with a new garage door." and "Upload a picture and click on our Garage Door Designer."

Pre-Chat Surveys as an Automated Switchboard

If your company has multiple departments (i.e. Technical Support, Sales, Billing, etc.), pre-chat survey is an excellent tool to connect visitors to the department best suited to handle their case.

You can define the scope of your departments in live chat, so that the pre-chat survey form can properly serve as an automated switchboard. For instance, you may opt to have your visitors select their inquiry type from a drop-down list in the pre-chat survey, and based on their selection, they will be routed to the most suited department to handle their inquiry or request. By doing so, you will increase the

efficiency in connecting customers to the first available operator trained to handle their inquiry or request, thus improving your first contact resolution rate in the long run.



The image shows a web browser window titled "Pre-Chat Survey" for "ABC Company". The form contains three main input fields: "Name" with the value "Serena", "Email" with the value "Serena@gmail.com", and "Inquiry Type" with the value "Sales". Each of the first two fields has a red asterisk to its right. The "Inquiry Type" field is a dropdown menu that is currently open, displaying a list of options: "--select an option--", "Sales (Online)", "Support (Online)", and "Billing (Online)". Below the dropdown menu, a "Start Chat" button is partially visible.

Pre-Chat Surveys as a Data Gathering Tool

The pre-chat survey is effective in improving chat efficiency when utilized as a data gathering tool prior to connecting the visitor to a chat operator.

By collecting personal and/or account information (i.e. full name, case number, email address, phone number, etc.) via the pre-chat survey, you will improve your operators' efficiency in addressing customer concerns, and researching for resolutions during the chat. As a result, when used as a data gathering tool, the pre-chat survey is also effective in minimizing chat durations, chat hold times, and chat queue wait times.

Pre-Chat Survey

ABC Company

Name: *

Email: *

Inquiry Type: ▼

--select an option--

- Sales (Online)
- Support (Online)
- Billing (Online)

Start Chat

Info

Serena

✉ Serena@gmail.com

👤 Sales

Visitor Segment

- VIP
- Paying customers

Location

Vancouver, British Columbia, Canada

Current Browsing ▼

Checkout

[Left] collect visitor info by pre-chat survey; [Right] all visitor info shows in agent console

Pre-Chat Surveys as a Personalization Tool

The pre-chat survey is an effective tool for inserting a human element and personalized touch to all customer interactions.

Rather than establishing robotic greetings, followed by generic questions like:

What is your name?

How may I help you today?

The information obtained from the pre-chat survey will enable your operators to establish an authentic human touch with personalized greetings like this:

Hi Kevin, my name is Anna, and I'd like to thank you for contacting us today. I understand you have billing questions, and it would be my pleasure to assist you with that right away.

By utilizing the information obtained from your pre-chat survey directly into your operators' personalized greetings, it's easier than ever to build instant rapport with your customers, thus improving customer satisfaction ratings, and fostering customer loyalty.

The Importance of Trial and Error

When deciding on whether or not to utilize a pre-chat survey, and what types of information to request for, we recommend that you first conduct a testing period for your assumptions.

First, initiate an A/B test by creating two different chat buttons. Then, you try one of two things:

- Route one of the chat buttons to a pre-chat survey and the other straight to a live chat session. This will help you see whether the pre-chat survey is a useful tool for your company.
- Create two distinctive pre-chat surveys, each consisting of fields that request different types of personal and/or account information, and each of which link to a separate chat button. This will help you figure out which type of information is most valuable for your company.

Allow the testing period to run long enough so that you can adequately assess how the various pre-chat surveys and/or the lack of pre-chat surveys perform. Over time, you will see a pattern of click-through and chat abandonment rates that will provide you more perspective on how well or poorly your pre-chat surveys and/or lack of pre-chat surveys are performing.

If you're finding that your visitors are prematurely abandoning your site and/or their live chat requests because your pre-chat surveys are requesting too much information, it may be time for some revisions so that your pre-chat surveys are sufficiently fulfilling their main purpose. Trial and error is imperative to the success of your pre-chat surveys.

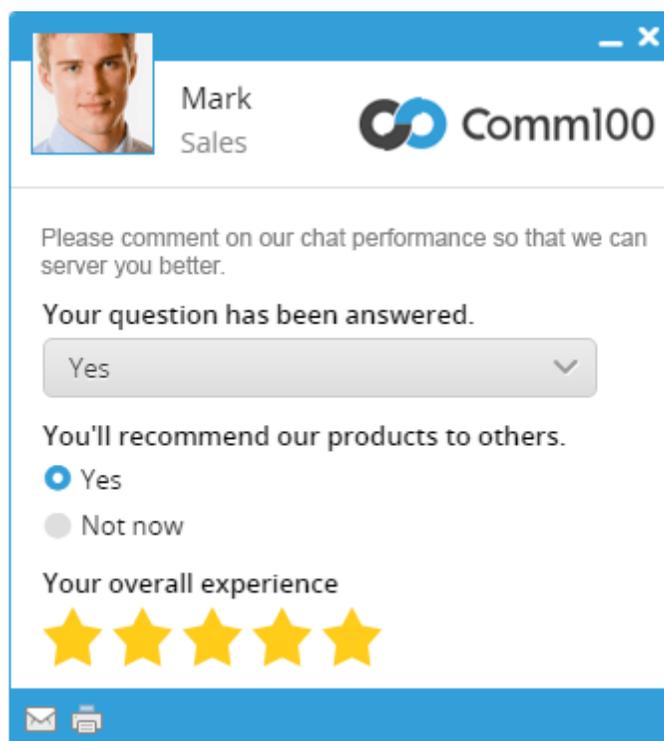
Leverage the Power of Post-Chat Survey: Tips and Best Practices

Post-chat surveys are increasingly recognized as an effective tool to collect customer feedback on the live chat service level when a chat ends. Next we will discuss how post-chat surveys can benefit your business in evaluating customer satisfaction and operator performance. Also, we will provide some best practices in designing post-chat surveys for your reference.

What Is a Post-Chat Survey?

A post-chat survey is an important feature of any live chat software, which allows website visitors to comment on their overall customer experience, as well as rate the quality of service they received from the operator they chatted with, at the end of each chat session.

Post-chat surveys are often as simple as asking visitors to rate the quality of service they received on a scale of 1 to 5 – with 5 being the highest score. Therefore, the higher the score, the more satisfied your customers are. However, post-chat surveys are fully customizable to take the form of a short questionnaire as well – using field types such as texts, radio buttons, check boxes, drop-down lists, etc. – in order to meet all types of business needs.



The image shows a screenshot of a post-chat survey window. At the top left, there is a profile picture of a man and the name 'Mark Sales'. To the right is the Comm100 logo. The main text asks the user to comment on chat performance. Below this, it states 'Your question has been answered.' with a dropdown menu set to 'Yes'. The next question is 'You'll recommend our products to others.' with radio buttons for 'Yes' (selected) and 'Not now'. The final question is 'Your overall experience' with a five-star rating system, where all five stars are filled. At the bottom left, there are icons for email and print.

Post-Chat Survey Benefits

If you are not using post-chat surveys after each of your agents' chat sessions, then you are missing out on an incredibly valuable tool for monitoring the customer experience, collecting customer feedback, gauging customer satisfaction, and evaluating operator performance.

Your customers' ratings and comments will not only allow you to assess your agents' soft skills and problem-solving skills, but also, business practices and policies that may need revision in an ongoing

effort to serve your customers better. Post-chat survey results can help you identify who your top performing live chat agents are, as well as those who may need additional training. As a result, managers often take the results from customer rating reports into consideration when completing quarterly or year-end performance evaluations.

Post-chat surveys also enable you to be more reactive. For example, if an agent provided poor customer service, and received a negative customer rating for the chat session, the agent's supervisor can immediately act upon what was revealed in the post-chat survey, and make amends with the customer who provided the negative rating.

The feedback you obtain from post-chat surveys allows you to gain valuable insight into customer expectations, and gives you the opportunities to deliver consistently extraordinary customer service and improve customer satisfaction ratings.

Choosing the Right Post-Chat Survey Format

Customers are drowning in an ocean of lousily designed online customer satisfaction surveys. If you want actionable insight into your customer satisfaction levels with live chat, it's very simple. You simply need to create a post-chat survey that asks the right questions, and is optimized to get high survey response rates. Here are some tips that will help you accomplish just that:

Keep it Short and Sweet

Customers typically do not want to invest too much time in responding to lengthy surveys. Make your survey tool short, concise, and actionable. You will get the best response rate from customers when they are able to send you a short satisfaction check.

The ideal length for a post-chat survey is 2 to 5 questions, governed only by what is important to the visitors. Respect the fact that your visitors' time is valuable.

Make it Simple

Keep the survey questions simple and straightforward so that visitors can immediately report a negative experience with a specific chat operator, or simply to confirm that all their expectations were fully met.

Use a Five-Point Scale

A five-point scale allows customers to quickly rate multiple areas of their customer experience on a scale of 1 to 5, with 5 being the highest score. For instance, customers can indicate how satisfied they are with the operator's level of knowledge or accountability in resolving their concern on a scale of 1 to 5.

Required or Optional Responses

Think carefully about the number of required responses in the survey. Do you need your customers to answer every single question in the post-chat survey? Perhaps all you really need is to obtain a rating, and as such, only this field should be made mandatory. Other questions can be left optional, so if customers feel inclined to do so, they can offer more feedback.

Use a combination of close- and open-ended questions

Examples of close-ended questions include:

Did the operator resolve your concern today?

Rate the operator's problem-solving skills on a scale of 1 to 5.

Might you refer another due to the service you received?

Did we exceed your expectations today?

Open-ended questions can be as simple as:

Do you have additional comments or feedback?

What destinations are you interested in cruising to?

When are you planning to go on a cruise?

Did we exceed your expectations today?

And be sure to give ample room for free-form feedback.

Only Ask Relevant Questions

There are many types of questions that a post-chat survey can ask website visitors after each chat session. However, be mindful that you should only focus on collecting information that will allow your customer service team to better serve your visitors in the future.

For example, you might ask:

Did the resolution we provide you today meet your expectations?

What or where would you like to see an improvement in the future?

Strengthen Your Brand Reputation with Post-Chat Surveys

If you opt for a post-chat survey, remember that this is the last window your visitors will see. As such, you want to make sure that customers receive a positive and professional image of your company. The best live chat applications enable you to customize every aspect of your post-chat survey – from font color and font size, to the images and texts displayed in the window.

Use the opportunity to promote and showcase your own brand, displaying your business logo and corporate signage. Use high-quality graphics and well-written texts. Ensure the post-chat survey window blends in well with your website design and layout. This way, you will receive much higher response rates, and more meaningful, accurate data.

Comm100 Live Chat - Chat Window

Mark
Sales

Happy Store

Please comment on our service performance so that we can serve you better. Thanks for your time!

Has your issue been resolved?
Yes

Rating:
★★★★★

Comment:
Very helpful!

Submit

The Advantages of Post-Chat Reports

Live chat applications generate rating score and survey question reports based on post-chat survey data. Rating statistics should be available for a specific operator, a department, or the entire live chat team. With chat rating reports, managers can clearly and quickly review rating scores, and obtain insight into the service level for each account, department and operator. For example, a manager can focus on the chats that were rated negatively, investigate the issue, and take immediate actions to rectify the situation. The post-chat rating report helps you improve service consistency, build stronger customer relationships, and foster brand or customer loyalty.

Some of the information that can be pulled from chat rating reports includes, for example, the number of times a specific operator has received a rating in a given period, the distribution of the scores, the average number of ratings and score for a specific department, etc.

Operator	avg. Score	Rating Times	1
Anna	5	1	0(0.00%)
Mark	4.6	70	3(4.29%)
James	4.59	88	4(4.55%)

The survey question report presents visitor feedback on each of your survey questions, which gives you more detailed information on what satisfies your visitors and what needs to be improved in your live chat service.



The Importance of Trial and Error

When deciding on whether or not to utilize a post-chat survey, what types of questions to ask, and how your customers will react, we recommend that you first conduct an A/B test for your assumptions.

Before placing a post-chat survey at the end of each chat session, make sure the survey design and settings are implemented as expected by previewing and testing the survey. This helps ensure that you are getting the quality data you need to draw informed conclusions.

As a general rule, you should always pre-test your post-chat surveys and forms on a focus group consisting of at least 5 people. Even with a small focus group, you will be surprised by the types of improvements you can make to your survey questions (i.e. word choices, phrasing, etc.) from the feedback and comments received.

Proactive Chat Best Practices with Ready-to-Use Scripts

Proactive customer service has become one of [the top trends](#) in recent years. And the live chat industry is no exception.

A [Forrester research study](#) shows that investment in reactive chat produces a return on investment (ROI) of 15%, while an additional investment in proactive chat capabilities will produce an incremental 105% ROI.

However, some people are concerned that proactive chat could annoy website visitors and drive them away. A poorly implemented proactive chat practice can be annoying, while an informed, friendly and timely invitation will bring in more sales opportunities as well as increase customer satisfaction.

At the end of the day, it all depends on your proactive live chat strategy.

In this section of our eBook, we will discuss the key elements of an effective proactive chat strategy: metrics, scenarios, and refinements.

What Is Proactive Chat?

Proactive chat is a feature that allows your live chat agents to invite website visitors into a one-on-one chat interaction. Chat invitations can be triggered based on visitor information and behavior metrics such as geographic location, current page, referral page, time on website, visit times, chat times, and more. Visitor information and behavior data can be collected through multiple channels such as custom variables, CRM integrations, and real time visitor monitoring. The more visitor data you can collect from

your live chat, the more personalized your proactive chat invitations can be. With the visitor data collected, proactive chat can be triggered manually by live chat agents or via an automatic invitation engine based on pre-defined rules.

Just as in a brick and mortar establishment where you can offer assistance to customers upon their entering your store, when they are looking at a specific product, or while they are at the check-out desk, proactive chat enables you to offer your visitors personalized and timely help along their online shopping journey.

Whom to Engage? Common Scenarios and Metrics

Whether the proactive chat is triggered manually or automatically, the goal is the same. You want to clear any obstacles in your visitors' way by providing assistance in a natural, friendly and timely manner.

Here are some common scenarios where visitors are more likely to accept proactive chat invitations:

The Hesitant Shopper

Are your visitors staying on your shopping cart or checkout pages for a long period of time without completing a transaction? You should target these individuals because not only are they quality leads, but proactive chat is proven to be effective in preventing shopping cart abandonment. According to [Forrester Research](#), Nationwide Mutual Insurance lowered their shopping cart abandonment rate by 30% to 40% after implementing a proactive live chat strategy.

Metrics you can use:

- Current page URL
- Time on the current page
- Shopping cart item count
- Shopping cart value

Possible scripts:

*Hi *customer name*, buying *product name* today can save you 20%. Would you like to chat for details?*

*Hi *customer name*, the promotion on *product name* is about to expire. Would you like to chat for details?*

We know that making a choice here can be difficult. We can review your options again if you'd like!

*Hi *customer name*, thank you for shopping in *business name*! Do you need any assistance with your purchases?*

Repeat/Return Visitors

Repeat/Return visitors are more familiar with your brand and therefore it is easier to build a connection with them. Chances are they are more willing to respond to a welcoming and helpful proactive chat invitation.

Metrics you can use:

- Visit times
- Chat times
- Time on website
- Current page URL
- Time on the current page
- Number of pages

- Order history

Possible scripts:

*Hi *customer name*, welcome back! How may I help you today?*

*Hi *customer name*, welcome back! Do you have any question about your order?*

*Hi *customer name*, welcome back! Any question about *product name*? I am here to help.*

Visitors from Certain Geographic Locations

It is important for businesses to identify which customers are of greater value or have greater intention to make a purchase. If your customer statistics suggest that visitors from a certain area have the most potential to buy, then they are the perfect target for proactive chats.

Metrics you can use:

- Country/Region
- City
- Current page URL
- Time on the current page
- Time on website

Possible scripts:

*We have an exclusive special offer for customers from *country/region/city*. Would you like to chat for details?*

*Hello, this is *agent name*, regional representative for *country/region/city*. How may I help you today?*

*We offer free shipping services to *country/region/city*. Would you like to chat for details?*

Upselling/Cross-Selling Opportunities

Proactive chat invitation is a great way to inform relevant visitors of your existing upselling or cross-selling campaigns. For example, when a visitor is browsing a T-shirt and you offer a bundle of T-shirt and jeans which can save the visitor \$20 if he/she purchases them together. Another common scenario for proactive chat is to remind visitors of possible discount or free shipping for orders reaching a specific threshold.

Metrics you can use:

- Current page URL
- Shopping cart item
- Shopping cart value
- Time on the current page

Possible scripts:

*Good news for you! We have a special offer on *product name* that can save you 40%. May I introduce the details?*

*Hi *customer name*, you can save *amount of money* buying *product A* and *product B* together. Chat for details?*

*Hi *customer name*, most of our customers who bought *product A* also bought *product B*. May I introduce the details?*

*Hi *customer name*, *product A* belongs to our *X series*. Would you also like to take a look at the other products in this series?*

*Hi *customer name*, we offer free shipping for orders over *purchase value*. May I help you get to it?*

**x dollars* off for orders over “purchase value”. Chat with me to get the discount!*

Pages with High Bounce/Exit Rate

Before implementing a proactive live chat strategy, you can review your own website analytics firstly. Whether you use Google Analytics or other website analytics tools, identify pages on your website that have a high bounce/exit rate or where you need to improve conversions or sales. Those pages that are under-performing in your metrics reports are a great place to begin proactive chat to improve website performance.

Imagine that you run an online pet care company. You noticed that 80 percent of visitors who land on your “Pets Training Program” sign-up form abandon the webpage after 30 seconds, and do not sign up for the program. With rule-based proactive chat, you can set up a chat invitation to automatically pop up when a visitor has been on the page for at least 15 seconds. By offering to guide them through the sign-up process, you can prevent visitors from prematurely abandoning the page, hence improving website conversion and sign-up rates.

Metrics you can use:

- Current page URL
- Time on the current page

Possible scripts:

*Thanks for stopping by our site! Do you have any questions about *theme of the page*?*

*Hi *customer name*, may I answer your question about *theme of the page*?*

*Hi *customer name*, may I guide you through the sign-up/download/free trial/... process?*

*Hi *customer name*, do you need any help in completing the sign-up/download/free trial/...?*

The FAQ Lurker

Are you noticing that your visitors are frequently browsing your help section, knowledge base, or FAQ? Chances are these visitors are highly interested in your product/service but may have unanswered questions. Or they are using your product/service and have encountered some problems. Either way, this is your chance to proactively invite these visitors to chat, and personally address their concerns.

Metrics you can use:

- Current page URL
- Time on the current page
- Number of pages

Possible scripts:

*Hi, this is *agent name*. May I help you find a resolution to your problem?*

It seems that you have some questions in mind. May I help you get them answered?

*Hi *customer name*, this is *agent name*, your support at “business name”. May I answer your question?*

*Hi *customer name*, any question about *product name*? May I help you out?*

The Product Pages

If you have a website that sells products, the most effective proactive chat invitations may be from the product pages themselves. Asking a customer if they have a question about a specific product that they have been viewing for 30 seconds or more can often lead to a sale.

Metrics you can use:

- Current page URL
- Time on the current page

Possible scripts:

*Hi *customer name*, do you have any questions about *product name*?*

*Hi *customer name*, may I introduce you the details of *product name* in person?*

*Hi *customer name*, this is *agent name*. I can answer any questions you may have about *product name*.*

*We have a special offer on *product name* today. Chat for details?*

The Referral Page

Tracking referring URLs can also create great conversion opportunities. If you know that a user came to you from a link on a site where you advertise a specific promotion, you can ask in your proactive chat invitation if they have any questions about the promotional offer that they saw on the referring website.

Metrics you can use:

- Referral page URL
- Current page URL
- Time on the current page

Possible scripts:

*If you have any questions about *referral campaign name*, I'm here to help.*

*If you want to get more details about *referral campaign name*, I'm glad to help.*

*This is *agent name*. May I answer your question about *referral campaign name*?*

May I present the special offer exclusively for “referral campaign name”?

What Not to Do in Proactive Chat

How do you react to being approached by a salesperson in a store? The answer is simple: it depends on the strategy employed by the salesperson. Targeted, personalized and timely offers to help are welcomed, while pushy, uninformed, and inconvenient intrusions are often frowned upon.

Below is a not-to-do list when implementing proactive chat:

- Do **not** target visitors within the first couple of seconds, before they even have the chance to look at your website. This causes unnecessary interruption and frustrates visitors. Let visitors get acquainted with your website first, and wait at least 30 seconds before showing your proactive chat invitation. They will be more inclined to accept your targeted auto invitation later on.
- Do **not** show a flashy chat invitation, or one that appears on every single webpage. This will likely annoy visitors as they can recognize that they’re auto invitations, rather than organic invitations sent by an online agent. While the auto invitation feature can be a helpful tool in your customer service strategy, if abused, it can be detrimental to your relationships with customers.
- Do **not** invite visitors to chat multiple times during the same browsing session – especially if they have already rejected your invitation once. Respect visitors’ choice to be left alone, and only extend an invitation once.
- Do **not** be too generic or robotic. Watch the language you adopt, and utilize available visitor information as much as you can to personalize your message (their first name, navigation history, location, current page, shopping cart item, etc.) You want to personalize your chat invitation message so that it does not appear to be system generated or forged.

Plan, Benchmark, Implement and Optimize!

If you have properly utilized proactive chat, the volume of incoming chat interactions is likely to rise significantly. Therefore, it is crucial to plan ahead, and ensure that your office or call center is adequately staffed to handle the anticipated amount of increased chat requests. If all of your chat agents are consistently reaching their maximum limit of concurrent chats, this will not only overwhelm your staff with unnecessary stress, but also frustrate your website visitors with extra-long wait times. The rule of thumb is that each website visitor should not have to wait longer than one minute to connect with a live chat agent. When you have developed your proactive chat strategy, consider your available resources, and plan staffing levels in advance.

Once you launch proactive chat, test what happens, and watch the statistics. Consider the following metrics:

How many visitors actually respond to your proactive chat invitations?

Which types of proactive chat invitations (automated or manual) perform the best?

What are the direct proactive chat results in terms of generating more sign-ups and increasing website conversion rates?

Do your visitors like generic or contextual invitation message?

Which color and image perform better?

How long is the perfect invitation timing for your visitors?

Use your live chat reporting features to better understand your agents' and your system's performance, and adjust your proactive chat accordingly. Make sure that you don't fly blindly. After you have made the necessary amendments to your strategy, be sure to review the proactive chat report to see if your chat acceptance rate steadily improves.

Conclusion

Every business has their own set of best practices when it comes to setting up their live chat experience. For this reason, it is important to always try and analyze the possibilities to find your own perfect fit. By examining the best practices laid out in this eBook, we are confident that you will find the optimal live chat set-up for your unique company and customers.

About Comm100

Comm100 Network Corporation is an award-winning global provider of enterprise live chat solution. Comm100 Live Chat is used by thousands of businesses worldwide to support their website visitors in real time so as to increase conversions, boost customer satisfaction and lower operating costs. With "100% communication, 100% success" as the company motto, Comm100 is committed to ensuring that transitioning human-to-human interactions to real-life success stories is always possible in a digital world.

Customers



Accreditations



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