



LIVE CHAT BUYER'S GUIDE

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INTRODUCTION

Adding live chat to your customer engagement strategy is a wise move. It's good for your customers, who prefer to chat with you online over calling or emailing, and it's good for your customer experience program because it's more personalized, more scalable, and more cost-effective. Live chat offers greater convenience while boosting loyalty, increasing conversion rates on your web properties, saving money, and improving customer satisfaction.

If you've never used chat before, it could be hard to know where to start, and hard to differentiate between offerings. We think we can help with that.

After thousands of implementations for tens of thousands of agents, we've learned a lot about getting started and being successful. We've massaged that experience into this handy guide to help you through the process. We've even included an RFP template that you can use to compare vendors.

If you're not 100% sold on live chat yet, see section 1 below, *The Top 5 Benefits of Live Chat*. Otherwise skip past it and start with section 2, *Assessing Your Needs*.

We hope you find it useful.

The Comm100 team

THE TOP 5 BENEFITS OF LIVE CHAT

From your call center to your sales team, live chat comes with a long list of benefits. Here's a run-down of the top five.



1. LOWER SERVICE DELIVERY COSTS

In 2012, research by [Aberdeen Group](#) revealed that companies could save as much as 50% of their support costs by adding live chat to traditional phone support. The primary reason is that live chat operators can handle multiple customer inquiries, whereas phone operators cannot. Add Natural Language Understanding AI and the ratio of customers to agents increases even more. And don't forget that the fixed and variable costs associated with phone support – hardware and toll charges – far outweigh an investment in web-based live chat.

Companies can save as much as 50% on support costs with live chat versus using traditional phone support.

Aberdeen Group



2. INCREASED SALES

A recent study by the [American Marketing Association](#) revealed that live chat on e-commerce sites can increase conversion rates by 20% or more by helping customers get answers to their questions faster and removing buying objections (Agent: "You're looking at our most popular sea kayak. I can tell you five reasons why our customers choose this one over other models.")

What's more, visitors using live chat are 3 times more likely to buy than non-chat visitors. The more direct, personal interaction tears down buying barriers and can even simplify transactions if your chat window can process payments (in full PCI compliance, of course).

It's obvious with these numbers that live chat is effective, and that's true for a number of reasons. Since live chat provides visitors with instant access to your support staff and sales team (and vice versa,) your team has many more opportunities to turn these visitors into paying clients or customers. Being able to answer questions about your products or services, provide recommendations or extend a simple proactive invite to chat may be just the little push a visitor needs to make a purchase.

*Live chat helps increase conversions by at least 20%;
the typical ROI rate from paid software for
sales teams is about 300%.*

American Marketing Association



3. CUSTOMERS WANT TO ENGAGE VIA LIVE CHAT

Properly staffed and configured, live chat gives you the ability to engage with visitors 24/7. Even if you don't keep your call center open around the clock, you can leverage powerful AI and use chatbots to listen to, understand, and respond to customer inquiries.

Let's face it – no one wants to call or send an email anymore, certainly not the emerging Millennial generation and beyond. Just ask FedEx, where 74% of customers will use another channel before making a voice call¹. Chances are high your customers are there too, or well on their way.

Chat: not always live but always on, and thanks to AI, always ready with the right answers.



4. ATTAIN HIGHER CUSTOMER SATISFACTION RATINGS

According to the latest [Customer Service Benchmark](#) results from eDigitalResearch, consumers rated live chat highest compared to any other customer service touch point: 73%, compared to 61% for email and 44% for phone. With numbers like these, it's easy to see why customers return to businesses that provide live chat. Simply put, customers feel more confident doing business with companies that make support easy, hassle free and instantaneous.

¹Nicolas de Kouchkovsky, founder and principal of CaCube Consulting, speaking at the 2017 IA Conference in Las Vegas.



LIVE CHAT



EMAIL



PHONE

Being able to “push” links to help or training documents quickly via the chat window makes for a better service experience, not to mention faster issue resolution. Even better, why not co-browse and let your agent walk the customer right to the information they seek?

Doing this via email introduces significant lag and a poorer experience. Trying to do it by phone is a virtual non-starter (remember the last time you tried helping your parents find something on their tablet?)

Live chat is a simple and highly effective method for improving both customer service and loyalty.



5. DIFFERENTIATE YOUR OFFERING

Live chat is emerging as a critical customer experience channel across many verticals, from e-commerce to banking to higher education and beyond. But in terms of adoption, it's still has minority status. By making the move to live chat now, you can position your organization as a thoughtful customer experience leader and start taking advantage of all the benefits mentioned above before your competitors.

If you'd like another opinion on the benefits of live chat, read this post in [digitaldoughnut.com](https://www.digitaldoughnut.com).

ASSESSING YOUR NEEDS

Before you start talking to live chat vendors – even us – you should spend some time considering and articulating your unique requirements. Are you looking to augment your current phone-based customer service offering? Do you want to tap in to the power of AI to handle after-hours inquiries or boost your agents' responsiveness? There are many angles to consider. We've compiled this list to get you started.

- Visitor monitoring and tracking
- Agent monitoring and tracking
- Rules-based routing
- AI-powered (bot) interaction
- e-Commerce integration
- Social media integration
- CRM integration
- Multi-language capabilities with auto-translate
- Chat analytics
- Branding and customization



There are of course many other capabilities and considerations you may have. To that end, we have prepared a more exhaustive checklist that you can download [here](#). In fact, you can likely use it as a Request For Information (RFI) to submit to potential suppliers. It's yours for the taking. Here's a sneak peak at the core categories in the checklist:

- Company details, history, and customer data
- Implementation and Support services
- Hardware and software requirements
- Security and Compliance
- Configuration and administration
- Agent-side capabilities
- Visitor-side capabilities
- Routing
- Branding
- Integration
- Licensing

RFI TEMPLATE: A COMPREHENSIVE LIST OF LIVE CHAT CAPABILITIES

To help make your search for the best live chat solution a little easier, we have created a free Request for Proposal, or RFP, template for your download. The free template details the questions to ask and the feature requirements to include in a comprehensive live chat software RFP. It can save you a considerable amount of time versus producing the document on your own from scratch.

GENERAL QUESTIONS

COMPANY OVERVIEW	INPUT
Company name	
Year founded	
Where is your company located?	
# of staff by department: Sales, Marketing, Support, Product	

LIVE CHAT IN GENERAL	INPUT
When was your live chat solution launched? If acquired, when was that?	
Please name at least 3 current customers in our industry.	
Who do you consider as your primary competitors? How is your solution different and/or better than theirs?	
IMPLEMENTATION, SUPPORT AND SERVICE	INPUT
What is your average length of time for a typical implementation?	
What level of expertise is required to manage the software?	
Please outline your onboarding process.	
Please outline your training program, specifying if it is included or offered at an extra cost.	
What training materials and user manuals will be provided?	
Please describe your technical support program, including details on availability and service level agreement.	
What is your Incident Escalation Plan?	
Do you provide a dedicated account manager? What's his/her availability and SLA for responses?	

SECURITY AND RELIABILITY	INPUT
What security measures are deployed to meet necessary security standards?	
How is the network communication encrypted?	
What type of security scans or auditing do you run?	
Where is your data center located?	
What kind of redundancy do your servers and network have?	
What security measures, certificate and auditing does your data center have?	
Do you have anti DDOS mechanism in place?	
Describe your solution's admin and agent side password policy.	
Describe your solution's change tracking and auditing capabilities.	
What is your downtime history over the past 6 months?	
What is your policy on scheduled downtime?	
What are your Disaster Recovery (DR) and Business Continuity (BC) plans?	
How often are your DR and BC plans tested?	

FEATURE REQUIREMENTS

VISITOR IDENTIFICATION AND ENGAGEMENT	INPUT
Do you offer a pre-chat survey to qualify chat visitors?	
What visitor details can you capture and reveal in the agent console (e.g. location, browser, customer record, etc.)?	
Can agents see where visitors are/have been on your website?	
Do you maintain a visible history of previous visitor contacts, whether anonymous or signed in?	
Can chat transcripts be captured, stored, and shared externally?	
Describe your solution's ability to use offline messages when chat is not available.	
Do you offer a post-chat survey to gather visitor feedback on their chat experience? If yes, how configurable is it?	
Can you maintain a record of a visitor's complete website navigation history?	
Does your solution support custom fields for gathering specific visitor information?	
Can your solution access data from other systems for viewing in the agent console, e.g. shopping cart details or customer identification from a CRM or membership system?	
Do you support Visitor Single Sign On?	

ROUTING	INPUT
Auto accept chat	
See and manage the chat queue	
Route visitors to a specified agent	
Last-chatted agent preferred	
Routing by department or agent skill	
Rule-based routing	
Load balancing auto assignment	
Round robin auto assignment	
Capability weighted auto assignment	

CHATS AND MESSAGES	INPUT
BASIC	
Unlimited concurrent chats	
Unlimited canned messages & URLs	
Keyboard shortcuts for canned responses	
Multi-level canned responses	
Canned responses import	
Canned files	
Visual & audio alerts	

Built-in spell checker	
Shortcut	
Offline message form	
Agent away mode	
Send greeting message automatically	
Transcripts available for query	
Emoticons	
ADVANCED	
Typing indicator	
Drag & drop file transfer	
Screenshot and image sending	
Automatically end chats	
Block visitors by Id, IP or IP range	
Send transcript to email	
Auto-forward offline message to email	
Proactive manual invitation	
Auto time-on-site invitation	
Rule-based auto invitation	

Auto-away when keyboard and mouse are idle for a certain period of time	
Built-in translation tool	
Built-In remote assistance or integration	
Call back	
Voice chat	
Video chat	
Co-browsing	
Agent busy mode (Custom mode)	
Auto reply when agents do not have response for a long time	
AGENT MANAGEMENT	
Agent role and permission management	
Monitor or join an ongoing chat	
Assign agents to one or more Departments	
Manage agent availability schedule	

ANALYTICS AND INSIGHTS	INPUT
Real-time analytics dashboard	
Visitor data: source, keyword, search engine, geography, other	
Chat metrics, e.g. Total/Missed/Refused; Time in queue; Revenue conversion; Request page	
Customer rating	
Agent metrics, e.g. Workload; Time online; Efficiency; Agent allocation	
Ability to export reports for offline viewing and sharing (PDF, CSV, HTML, XML, XLSX)	
CHAT WINDOW BRANDING	INPUT
Sticky, fixed, text & email signature chat button	
Mobile friendly chat button	
Chat button/Image gallery	
Hide chat button when offline	
Embedded & popup chat window	
Deploy across multiple domains	
Customizable chat buttons	
Customizable windows (Banner, title)	

Multi-brand customization	
Mobile friendly chat window	
Agent avatar	
Custom CSS	
TEAM COLLABORATION	INPUT
Transfer chat to another agent	
Agent kickoff	
Chat with other agents	
Transfer chat to a department	
Invite another agent/department to Join chat	
Keep agent internal chat transcript	
SECURITY AND COMPLIANCE	INPUT
SSL encryption	
CAPTCHA Verification	
IP Restriction	
Data-Center Redundancy	
Secure PCI Compliance	
Credit Card Masking	

eTrust certification	
ISO 27001 certification	
HIPAA compliance	
INTEGRATIONS	INPUT
WordPress	
Joomla	
Shopify	
Magento	
Drupal	
Wix	
BigCommerce	
PrestaShop	
OpenCart	
Visitor sign in with Facebook or Google+ account	
Salesforce integration	
Microsoft Dynamics CRM integration	
Zoho integration	
Zendesk integration	
GotoMeeting integration	

LogMeIn integration	
Join.Me integration	
Google Analytics integration (Transmit Data to GA)	
API & SDK	
Please describe your application program Interface (API) capabilities	
Do you offer a mobile software Development Kit (SDK) for embedding chat in mobile apps?	
Can your solution share data with third-party systems including CRM, Help desk, etc.? Please elaborate.	
MULTI-PLATFORM	INPUT
Which web browsers does your front-end chat window support? Please identify any limitations.	
Which desktop operating systems does your agent console support? Please identify any limitations.	
Which mobile devices and operating systems does your solution support?	

PRICING

PRICING	INPUT
<p>Please describe your pricing policy in detail, inclusive of license fees, implementation, and any other fixed or variable costs. Please include a description of your standard payment terms and cancellation policy.</p>	



LET'S CHAT

Comm100 is a leading global provider of multi-channel customer engagement solutions with a mission to make online service and support delivery more genuine, more personalized, and more productive through meaningful conversations. Let us show you how.

[Book a demo today!](#)