



The Ultimate Guide to

# Managing Successful Live Chat Teams

How to build, train and measure your  
customer service team for peak performance



## **Foreword by Kaye Chapman, Learning and Education Manager, Comm100**

Live chat rollouts can feel complex, with a lot of different moving parts. Often, companies focus heavily on their checklist of features, ensuring that their chat system meets their needs in a technical sense. But that's only one part of the puzzle. Great technology is all very well – but if your agents aren't properly enabled to use it then you'll never realize its full potential.

In my role as Comm100's Learning and Education Manager, I help our customers and their agents get fully trained on our software. Through training hundreds of clients in many hours of sessions, I know that the companies who eventually get the most value out of live chat are the companies who don't rush into it – they take the time to build a strong foundation, and they reap the benefits for it.

Great live chat team building happens in two ways. Firstly, live chat managers need to think carefully about how to take full advantage of the capabilities of the technology. There's a lot in live chat that saves time and allows for easier exceptional customer outcomes. For example, canned messages help ensure answers to common questions are consistent and fast, co-browsing helps for tricky technical scenarios, and routing removes the need for 'transfer tag' (customers being passed around unnecessarily). Getting the most out of those features requires setting them up to suit your precise use case, so it pays to work closely with your live chat provider to figure out the perfect mix for you.

Secondly, help your agents use those features as smoothly as possible. Live chat comes with a wealth of features – some are completely intuitive, but others require hands-on experience for maximum potential. Gathering agent feedback throughout the go-live process, giving them time for training and experimentation, and encouraging them to find the limits of the software are all great ways you can set your team up for success.

This eBook is designed to help you maximise the value of your rollout from the perspectives of both customer and agent experience – drawing on our experience through thousands of live chat implementations to show you where to focus your attention, and how.

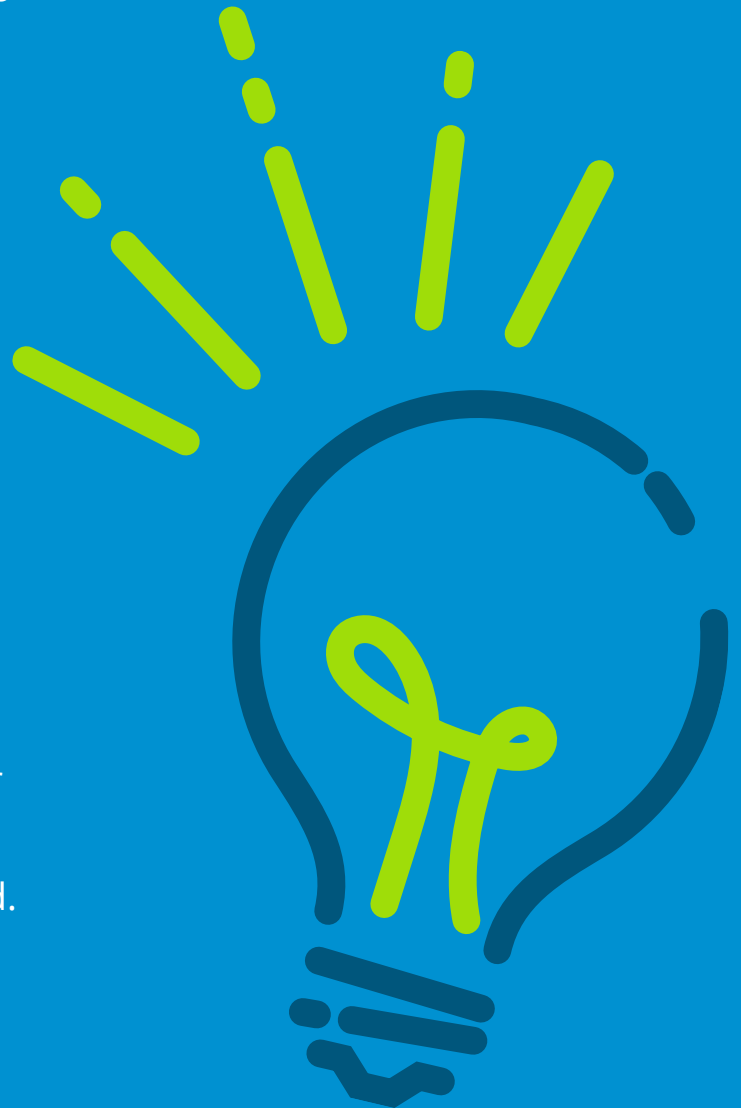
Building a superstar live chat team isn't easy, and it won't happen overnight. But the results are most definitely worth it!

# Introduction

Regardless of the size of your organization, setting up and managing a live chat team can be a nail-biting experience. Even if the technology rollout is smooth, there are many more factors you need to consider for your live chat team to succeed, from launch and well into the future.

This comprehensive guide takes you through the step-by-step process to build or restructure a top-performing live chat team; from hiring the right people, training and setting them up for success, to taking the next step to superstar status and hitting your key customer service KPIs quarter after quarter. This eBook will enable you and your live chat team to provide fantastic service that exceeds your and your customers' expectations.

Pick out the sections which are most relevant to you or read cover-to-cover for maximum impact. Keep it handy because no matter where you are on your journey, you'll find a story, tip, or hack to keep you moving forward.



# Build, Train, Measure

## Table of Contents for this step-by-step guide for live chat managers

|  |            |
|--|------------|
| <b>1. Build Your Dream Team .....</b>  | <b>6</b>   |
| 15 Must-Have Customer Service Skills to Look for in a Live Chat Agent .....                                      | 7          |
| Top Interview Questions to Find the Best Live Chat Agents .....  | 12         |
| <b>2. Train Your Agents for Live Chat Success .....</b>  | <b>16</b>  |
| The Importance of Onboarding Programs – Why You Need it & How to Create it                                       | 17         |
| 4 Fundamentals to Training Live Chat Agents .....  | 23         |
| <b>3. Live Chat Scripts and Writing Guides .....</b>   | <b>27</b>  |
| A Complete Guide to Writing for Customers – Templates and Tips for Credible Communication in Key Situations..... | 28         |
| How to Write a Thank You Letter to Your Customer with Easy-to-Use Samples .....                                  | 42         |
| 5 Things to Consider Before Drafting Sales Letters and Emails .....  | 50         |
| How to Write Powerful B2C Sales Letters and Emails, with 7 Real-Life Examples .....                              | 55         |
| How to Write a Winning B2B Sales Letter in 7 Easy Steps .....  | 67         |
| Holidays, Birthdays and More – 20+ Letters to Customers for Special Occasions .....                              | 77         |
| 101 Ready-to-use Live Chat Scripts.....  | 90         |
| <b>4. Track and Measure Your Live Chat Team.....</b>   | <b>103</b> |
| The 9 KPIs You Need to Track .....   | 104        |
| How To Use Your KPIs As Part of an Ongoing Performance Plan .....  | 111        |
| <b>5. Take Your Team to the Next Level.....</b>  | <b>113</b> |
| How To Deliver Better Service With Omnichannel Customer Engagement.....  | 114        |

## The Wrap-up

# 1

## Build Your Dream Team

So you've decided to upgrade your customer service strategy with live chat. Congratulations!

To begin, you are going to need to build your dream team. But how can you tell who will treat your customers with kindness and compassion? Who will work diligently to provide them with the solutions and the support that your customers are looking for? And if you already have a call team, are they the right fit for live chat?

This first chapter will answer these questions and more, outlining how to build a live chat team that's the envy of even the most revered customer service teams. You will learn:

- The 15 must-have customer service skills to look out for when interviewing hiring, and evaluating live chat agents, and,
- The key interview questions to ask to identify these skills.

# 15 Must-Have Customer Service Skills to Look for in a Live Chat Agent

## 1. Patience

It doesn't matter what industry you are in or which walk of life you come from: dealing with people requires patience. And customer service can require a lot of it.

Sometimes customers can take a while to get to the point or might be slow to type out a response. Often, they may not understand a part of the solution that your agent is offering them and will require a step-by-step explanation. They might even disappear for a few minutes while your agents are chatting with them. Regardless of why the issue takes time to be resolved, it is important that your live chat agents know how to be patient with your customers. The following skills are must-have's for your live chat team:

## 2. Avid Listener

Some customers have a lot to say, others need to have additional details coaxed out of them. No matter how a customer communicates, your live chat agent needs to be a masterful listener – digitally, that is!

If an agent can't correctly read and understand a customer's problem, they might miss key information and provide unsatisfactory solutions. If they are talking to a customer over audio or video chat, they might force a customer to repeat themselves, which customers cite as the number one irritant when dealing with customer service representatives.

Ultimately, customers want to feel like their issue matters. An agent who is an avid listener in person will know how to use good virtual listening skills to make the customer feel heard and get started on the right track towards resolution. You might also want to check their reading skills just in case!

### 3. Empathetic

Empathy is the ability to put yourself in someone else's shoes. It allows a person to truly understand how the person is feeling – whether that's frustration, annoyance, or joy.

For a live chat agent to really want to help a customer, they must be able to empathize with how the customer is feeling and relate to their issue. This will enable them to care enough about the customer to go the full mile for them and provide them with the most satisfying solution possible. It will also help them to interpret the customer's tone and emotions, allowing them to know how to speak with the specific customer.

### 4. Strong Communication Skills

There is a certain level of art to communicating through writing and your live agents must be able to master this. This involves being very clear to avoid repeat contact and to make sure that the customer understands what has been said.

This also means communicating with the customer in a way that they will best be able to understand. Agents shouldn't use any uncommon abbreviations or jargon and unexplained technical terms that your customers might not be familiar with. For video and audio chat, agents should also be ready to use tone and body language to communicate effectively.

Communication skills will serve your live chat agent not only in the chat window, but also when tagging chats, writing follow-up notes, and in communicating effectively with managers or fellow agents.

### 5. Willingness to Learn

Starting almost any new job requires learning new information and applying new skills – and it's no different for live chat agents. For starters, they need to familiarize themselves with the product so that they will be able to pass on the correct information to customers. They will also have to learn company policy, the computer systems, and how to operate the live chat program among other things. Even learning about the industry and competitors can be helpful when communicating to with customers.

Part of the willingness to learn also includes being comfortable asking superiors whenever they are unsure, instead of giving a customer wrong or uncertain information.

## 6. Team Player

If a new team member asks a fellow live chat agent a question or for help, they should do what they can to lend a helping hand. This is important because contact between agents fosters learning moments which ultimately play a big role in the onboarding process. It's also vital to keeping up the quality level and happiness of your live chat team as a whole.

## 7. Positive

Everyone has their off days now and then, but it is important that your live chat agents have an overall positive attitude. Negative customer service agents and negative customers can feed off one another's bad energy, and result in an upsetting interaction for everyone.

Thinking positively has been proven to help people see many possibilities for resolving a problem. It can also help agents to cheer up customers who are upset or help them see the bright side of a sticky situation. Positivity will give an agent resilience after having dealt with a difficult or upset customer. It is a necessary tool for creating a happy, healthy environment in which all agents can flourish.

## 8. Self-control

"Don't bring your baggage into the workplace" isn't always as easy as it seems. And when you're working with a difficult customer, it can be tempting for your agent to slam against their keyboard and throw whatever emotions they are feeling that day out at the customer.

Sarcasm, curtness, or other disguised forms of aggression are means that some agents use to let out their frustration – whether personal or work-related. These behaviors, however, can be very upsetting for customers and are not as discrete as agents might think, even in typing. Live chat agents must be able to manage their emotions and exert self-control during every live chat session, no matter how they are personally feeling.

## 9. Multitasker

Unlike with typical call center support on the phone, live chat agents are expected to handle multiple customers' problems at once, juggling several chats at a time. In order to succeed, your live chat agents must be effective multitaskers. This means not ignoring or forgetting to respond

to one chat because you're busy with another. It might also mean working on answering customer emails or other assignments while also actively participating in a chat. We have tips for how to master multi-chatting more effectively on [page 118 - Agent Assist/Canned Messages](#).

## 10. Manages Time Wisely

One of the most evaluated metrics is an agent's average handle time (AHT). Live chat agents should measure up and use good time management practices to achieve the average handle time benchmark that is set by your company.

That doesn't necessarily mean rushing to complete a chat; it means knowing where to spend your time and how to spend it wisely. For example, your agent should know the difference between when to escalate a customer issue to a supervisor after spending half an hour trying to help them without success, versus a customer who just needs a simple answer and friendly goodbye.

## 11. Assertive

There are three key types of behavioral styles: passive, aggressive, and assertive. Customers can adopt any one of these styles and so can agents. In order to effectively deal with customers, an agent should be assertive. This means being able to maintain control of a conversation that is being hijacked by an angry, aggressive customer, while also being able to help guide a conversation with a passive customer who doesn't know how to express what they want towards resolution.

The right live chat agent won't be a pushover (passive), but they also won't be a bully towards your customers (aggressive). They'll adopt the middle ground to result in the most satisfying conversational outcome for every customer.

## 12. Keeps calm under pressure

When the stakes are high for a customer, a chat window can turn into a high-pressure and even hostile environment. A live chat agent needs to know how to "keep calm and carry on," even when they are being yelled at (or typed at in all caps) at rapid fire by a customer. By handling escalated, tense situations with calmness and fortitude, a live chat agent will be able to de-escalate the issue.

## 13. Problem-solver

The best live chat agents are fantastic problem-solvers. When a customer reaches out to them with a problem, they can quickly and accurately come up with a solution to the issue. This is especially important because agents will not always have the resources or the means to get customers exactly what they want. By using problem-solving skills, agents will be able to turn a limiting situation into a realm of opportunities.

This ties in to being able to negotiate. Your customers won't always get the perfect solution that they were hoping for. By negotiating with a customer, your agent can find a solution that works for both your customer and your company, so you're not constantly giving away discounts or things for free as a form of resolution or appeasement.

## 14. Professional

Live chat agents should be professional in their interactions with customers. That means knowing what tone and language to use in interactions to represent the brand, even if the customer is being informal and using slang. If they are using humor with their customers, agents should know exactly how far to take it. It means representing and being true to your brand identity.

## 15. Reliable

Whether your live chat agents are working remotely or in the office, you need agents who are reliable. Agents should be able to clock in on time and not leave their co-workers buckling under the pressure of a heavy queue. They should also be relied on to stick to established rules and procedures, such as wrap-up, note taking, service level agreements, and more. A live chat agent is an important representation of your company and you need to feel confident that they won't misuse their position.

# Top Interview Questions to Find the Best Live Chat Agents

Whether you are bringing aboard new live chat agents or setting up your live chat dream team for the very first time, you want to make sure that you are hiring agents that will have a positive impact on your team and your customers. These live chat interview questions and answers will help you get to know your prospective agents and find out if they are the best match for your company.

## **In your opinion, what makes for great customer service?**

This first question gives your interviewee a chance to show off their understanding of the customer service industry. It provides key information about how familiar your candidate is with the role and whether they know the basics of what will be required of them as a live chat agent.

## **What skills could you bring to our live chat team?**

This question gives your prospective live chat agent a chance to reveal a bit of their skill set and show their knowledge of why certain skills matter in the industry. It shows what exactly they are committing to bringing to the team and delivering to your customers.

## **What do you know about our product or service?**

Before a job interview, it is good to go in with some knowledge about the business. This question will show you that your interviewee did their homework. It will reveal whether your candidate has the ability and desire to learn about your product and company, and whether they are a serious applicant or not. A variation of this question if possible is, "Have you tried our product or service, and if so, what did you think of it?"

## **What is your experience with multitasking, and how would you feel about handling multiple systems/chats at once?**

Since live chat systems allow for agents to be on multiple chats at once, your candidates should be comfortable with multitasking. Fortunately, most millennials are familiar and comfortable with handling several tasks at a time. Many of them are already used to engaging with multiple contacts at once on social chatting platforms such as Facebook Messenger, WhatsApp, or iMessage. Sometimes your live chat agents will also be the ones interacting with your customers

on these channels – even better! ([Learn more about omnichannel on page 113](#)) While this may not be the same as your live chat interface, or you might not include social or SMS platforms in your strategy, it can still be valuable experience.

**Do you have experience as a live chat agent? What are some of the skills you might need in order to succeed as a live chat agent?**

Live chat customer service is rapidly becoming a norm, but not every company has adopted it yet. Even if your candidate has prior experience in a call center, they may never have attended to customers over live chat before.

This question will show whether your interviewee is aware of the skills that make an excellent live chat agent - skills which differ in many ways from those needed to fulfill traditional phone or in-store support.

**What kinds of customer service systems have you used and how familiar are you with them?**

This question will reveal whether an agent is familiar with specific customer service systems and will show how much additional training they will need in order to become well-oriented with your live chat solution or customer engagement platform.

Like the question before it, if a candidate doesn't have experience with this system then it shouldn't be a deal-breaker. If they do, however, then this candidate may be more easily trained and more quickly oriented.

**Unlike in a traditional call center, you cannot hear a customer's tone over live chat. What are some of the cues that you can look for over live chat to know how a customer is feeling?**

A big part of being a live chat agent is being able to sense a customer's emotions through written text. An agent who can perceive a customer's emotions can better avoid agitating an already frustrated customer. They can also recognize when more passive customers aren't quite satisfied with a solution and help them express what they want. Your agent should be able to identify these typed cues and respond accordingly.

**What is your experience working as part of a team and what does teamwork mean to you?**

Live chat is not a solo game. Without effective teamwork, your prospective agent will have a tough time learning, communicating, and sharing knowledge with their team members and supervisors.

Also, a candidate who is not interesting in helping their teammates will probably not have enough interest in helping others to be a part of your operation. Another way to pose this question is, "Tell me about a time where you worked well in a team."

### **What was your proudest moment helping a customer?**

This question should be answered with a specific story of a customer interaction and should show a candidate's ability to empathize with, and genuinely help, their customers. It will reveal whether that person is willing and able to go the extra mile. This question also sets apart caring individuals and those who thrive on challenges - both of which are desirable attributes for a live chat agent.

### **How well do you work under pressure or in high stress situations? What do you do when things are getting tense?**

Live chat is not always a walk in the park. Some companies are constantly busy with live chat messages; others have peak seasons when the department experiences peaks and troughs in chat volume. Even when there is low website traffic, certain conversations with angry customers can have a high-stress level. It is important to hire an agent who keeps their cool in times of stress.

### **Tell me about an experience where you had to de-escalate a situation with an upset and/or angry customer and how you handled it.**

De-escalation is an important part of customer service, and if handled properly can even be extremely rewarding. The ideal candidate will remain calm and respectful, while working hard to provide the best experience possible for this customer.

### **If you had to choose between completing a chat quickly or taking the time to make sure you'd solved the customer's issue, which would you pick? Why is that so important?**

The most effective customer service teams tend to value first contact resolution before and above many other metrics. This is because customers who have to make repeat contact will not only be considerably less satisfied - they will also end up increasing the queue and ultimately taking up more time and resources. The ideal candidate should understand the importance of solving a customer's issue the first time.

**Think about a time where you have had a good experience as a customer talking to a customer service representative. What made that experience so good?**

If an interviewee can tell you what they as a customer have enjoyed from customer service, then it is likely that they will strive to bring the same kind of service to the table. A candidate who can imagine being a customer can relate to your customers and empathize with their struggles.

**You have noticed a reoccurring problem or complaint amongst your customers. What do you do?**

Customer service isn't only about fixing a customers' problems - it's a platform through which customers can express themselves and even give your company advice. While helping customers is a must, an agent who is willing to go the extra mile and help prevent these problems from happening in the first place takes the cake.

This question reveals whether your interviewee has the determination and communication skills it takes to make sure that problems get forwarded to the proper channels, and that systematic issues get geared towards permanent resolution.

**Tell me about a time where you have used feedback of your performance from a supervisor, colleague, or customer in order to make a change for the better.**

An agent who cannot receive feedback or constructive criticism cannot grow. You want your prospective agent to show that they take feedback into consideration and use it to better themselves, rather than letting it fall on deaf ears.

**What have you done at your current company to improve a process and/or save time, money or resources?**

The best live chat candidates will be able to look beyond their interactions with customers and put their skills into practice in other areas. This question will reveal creativity, problem solving, resourcefulness and initiative amongst your candidates.

# 2

## Train Your Agents for Live Chat Success

You've interviewed and hand-picked the best live chat agents and are ready to go – or are you?

Before you can even begin training your new agents on how to use the system, you need to create and implement an onboarding program. This will lay the foundations for forming successful and fulfilled employees who fully understand their responsibilities and become intrinsic parts of the team.

This process should begin before any employee has even begun their first day. However, this doesn't simply mean giving them technical training on the new system or about your products or services. You need to prepare them for the intricacies and unique elements of live chat.

You will learn:

- Why onboarding programs are so important and how to create your own
- The four key elements required to provide the best training for your live chat agents.

# The Importance of Onboarding Programs – Why You Need it & How to Create it

## What is Agent Onboarding?

The purpose of agent onboarding is to help your new hires become satisfied, contributing members of your customer service team as quickly as possible. It aims to keep your new hires invested in the company and provide them with valuable resources to help maximize their effectiveness.

Employee onboarding is a comprehensive, ongoing process involving both management and new hires that can last anywhere from three months to a year – from the interview stage, all the way up till they have reached their full productivity-potential and are experts at the company. During this process, your live chat agents will learn the following:

- What they can expect from your company
- What the company expects from them
- What resources are available to them
- How management will support them

## What are the Benefits of Installing a Live Chat Onboarding Program?

Research shows that nearly [one out of three new hires look for a new job within their first six months on the job](#). Among Millennials, that percentage is thought to be even higher.

An effective live chat onboarding program will help your new hires become engaged with company culture and reduce the risk of quick turnover. It will also reinforce your company's commitment to helping employees grow and foster a supportive relationship between new hires and management. The result? Increased confidence and job satisfaction amongst live chat agents, resulting in higher agent productivity and a low turnover rate – saving you the [cost](#) of having to recruit, hire, and train new agents, should your agents quit.

Customer service onboarding programs also prevent your new hires from being unleashed into your world of customer service unprepared. This can help prevent any major faux pas in your new hires' first months and helps ensure that your customers receive superior service. An onboarding program can include KPIs that work well in conjunction with a typical probation period too - this allows you to establish clear expectations and goals.

## Creating Your Own Live Chat Onboarding Program

To create your own effective onboarding program, be sure to take the following steps:

### Plan Ahead

Contrary to what you may have heard, onboarding doesn't start on an employee's first day. According to Erin Perry, Vice President of Global Solutions at Cielo, a [successful onboarding program](#) begins during the recruitment and hiring process.

Your company can begin the onboarding process before a candidate even steps foot in your building by including ample information about the position requirements, your workplace, and your company culture in the "Careers" section on your website or on job boards. By planning ahead and making relevant information easily available to your candidates during the application process, you are also more likely to attract individuals who are aligned with your company's goals and culture.

### Prepare A Written Statement of Responsibilities

A good first step when hiring for any new role is to write down their responsibilities and provide them with a printout of it during the interview process to help avoid any confusion about their role. The candidate should fully understand and agree to the responsibilities that you have in store for them before coming aboard. Make sure to also give them another on their first day.

A written statement of responsibilities should include how your new agents' performance will be assessed so that your new hires will have goals to work towards. This includes any key performance indicators (KPIs) and what the benchmark is within your organization.

## Keep Your Other Agents in the Loop

Nobody likes to show up to the office on their first day feeling out of place or unwelcome. Before your new hires come in, let your supervisors and current agents know that they are coming. By encouraging your current staff to give these new agents a warm welcome, they will begin to feel like an important part of the team - not an afterthought - from day one.

Once your new hires come in, introduce them to their fellow live chat agents and their supervisors. Point out who they can go to for help and ask these identified agents to lend a hand when needed. Another great strategy is to introduce your new hires to other relevant teams that they may need to interact with. Establishing these relationships outside of the immediate team is vital, both from an everyday working point of view, as well as to foster a unified culture throughout the office.

## Make the First Day Count

By the time your new hires come in for their first day, several workplace elements should have already been taken care of. Here are some of the things that you should take care of before your new hires' first day:

- Plan where your new hires will be seated; clear and set aside their desk. A new hire who comes in without a desk ready for them will feel like an afterthought and may feel uncomfortable as a result.
- Make sure that desks, seats, and monitors are appropriately sanitized and set up - this is important from a health and safety perspective.
- Set up their computer, login information, email, and live chat systems before they walk in to save time.
- Set up video chat and/or phone systems if necessary.

Once your new hires arrive, it's time to make their first day count. Here are some of the basics that you should take care of and/or introduce your live chat agents to on day one:

- Fill out any first day paperwork that the HR team gives you such as payroll.
- Take new hires on a tour of the building. Show them where bathrooms are, the break room, the cafeteria, and other key features of the office.
- Clear up any parking doubts, explain how breaks work, and give any other relevant information.

- Give new hires an idea of what their first few weeks will look like, including a training schedule if you're planning classroom training, so they know what to expect.
- Touch upon live chat customer service basics and provide resources to further this knowledge.
- Provide resources to help develop product and business knowledge.
- Introduce new agents to the system and start teaching them how to use it.
- Introduce new hires to their fellow agents, supervisors, and other personnel.

Taking care of these elements will make for a productive and successful first day and will get your new hires started on the right track.

## Use a Buddy System

Two heads are better than one... especially when you're getting ready to turn a new hire loose on your customers. Choose a responsible agent to buddy each new hire with and seat them next to him or her. Assign them with the task of assisting with orientation or acclimation. This may initially involve your new hires shadowing your seasoned agents, and eventually will lead to the experienced agents watching while the new hires try the system out for themselves.

Using a buddy system also initiates the socialization process and helps your new hires become comfortable with someone on the team who they can reach out to in the future.

## Always Give Feedback

From their first day on the job, you want to begin providing new hires with feedback. Correcting mistakes in real-time is vital to preventing any slips in customer service quality. It is also necessary so that your agents can learn the right way to do certain processes from the get-go and not need additional correction down the line.

Normalizing feedback is also essential so that your new agents don't feel personally attacked by, averse to, or above any constructive criticism that you need to give them in the future.

## Encourage Socialization During Breaks and Lunch

Socialization is an important part of helping a new hire feel acclimated with the team. In fact, studies show that the secret to happy, engaged, high-performing employees might

be as simple as having close relationships with colleagues. According to a survey by Virgin Pulse, [40 percent of respondents indicated their co-workers as the top reason they love their company.](#)

Part of your onboarding process should be helping your new hires begin to invest socially in your company. You can start this process during your new employees' first few days by encouraging the other agents to create a friendly environment for new hires. This can be as simple as encouraging seasoned agents to invite the new hires to lunch or to chat with them during a break. Consider going the extra mile and having a team lunch to welcome them. These steps will help your new hires feel more at ease and give them more people to turn to should they need help with a live chat situation.

## Use Games Smartly

During the onboarding process, games can have many functions. They can help new hires learn the names of their co-workers and become more comfortable socializing and interacting with them. They also make the onboarding process more entertaining for everyone.

Try spicing up your onboarding process with selective games, friendly competition, and a reward system to help your new hires get in the swing of things. Alternately, you can even try presenting the entire onboarding process as a game. Consider having certain goals that your new hires need to reach in order to “level up.” Once they reach these goals, you may want to offer a reward or verbal congratulations and/or acknowledgement.

## Check the Metrics

Before new hires begin live chatting with customers, be sure to put them through a degree of testing first to ensure that they can handle queries appropriately. One way to do this is with a customer service training course and certification.

Once your new agents are ready to interact with customers on their own, you are going to need to implement quality control by periodically reviewing their live chats. You can view live chat transcripts in real-time as they are happening or go over each new agent's live chat history. This is necessary to ensure that your customers are getting the best possible experience and that any mishap is corrected immediately before it becomes habit.

It's also important that you check agent metrics to measure productivity. Are your new hires where they should be at this point in the onboarding process? If not, why is that? Is there something that needs to be addressed with a specific new hire? Or is it a matter of unrealistic goals that require a bit of re-evaluation on your end?

## Conclusion

As Erin Perry, Vice President of Global Solutions at Cielo, wisely puts it:

*“Your employees are going to get oriented whether you plan for it or not. But if you do plan it, it's a lot more likely to be successful.”*

By creating a prepared, well-crafted agent onboarding program, your customers, new hires, and your team will all feel the effect: right now, months, and even years down the line.

# 4 Fundamentals to Training Live Chat Agents

## 1. Words, Tone & Body Language

Professional customer service agents understand that successful face to face communication hinges on three key elements - words, tone, and body language. Whilst telephone communication can be difficult because the agent can't assess the customer's body language, live chat presents extra challenges as you can neither see body language, nor hear tone of voice.

As a result, attention to wording becomes crucial. Agents need to step up their communication a notch to consider sentence structure, word choice, and conversation flow in building and assessing the intent of a communication.

### Pro Tip

*Hold a short training session introducing the [Mehrabian communication model](#) and asking your agents to consider the impacts of not having tone or body language to help them communicate. Questions to ask include: What problems could arise through relying on just words to communicate with? How could miscommunication occur? How could this be prevented?*

## 2. Live Chat School

Whilst training is critical, the most important part of learning is applying the knowledge you've learned in the workplace. As much as [70% of learning occurs through hands-on, on the job work](#), not through structured training sessions.

## Pro Tip

*Introduce a 'Live Chat School' by setting standards for your team to attain and assessing them throughout the extended training period. Once they hit targets for customer satisfaction, chat length, and/or utilization, 'graduate' them to your regular quality assurance program – and make sure to provide them with incentives throughout.*

*Incentives can be monetary or emotional — for example, through receiving recognition. It was discovered that companies which offer monetary incentives for their staff achieve little financial gain as compared to those who use emotional incentives. Consider what's really important to your staff as you create a reward plan.*

## 3. Live Chat Scripts

Live chat scripts are a great way to improve efficiency as the agent can simply choose from a selection of scripts in the agent console without needing to type out a whole message. These are also known as “canned messages” and can also help to keep a check on quality control too. This can create consistency for example, by adding scripts that discuss product features without missing any key details, or for giving complete step-by-step instructions on how to reset a password along with the right links.

It's important for you to acknowledge how important scripts or canned messages can be in increasing quality and saving time. You can also give your agents the chance to think creatively about how they can develop scripts that work well for them too, which they can store as personal canned messages or share with the rest of the team. We have provided you with [101 ready-to-use live chat scripts on page 89](#).

## Pro Tip

*Hold a scriptwriting workshop for your agents. Examine what scripts are already used and what scenarios new scripts could be written for, especially for frequently asked questions or long or complicated answers. Make sure to discuss potential time-savings and the disadvantages of repetitively typing out the same statements for different customers.*

## 4. Live Chat Features

With the latest live chat technology, there are many features your agents can use to improve the customer experience, as well as improve agent efficiency. For example, a customer might be having difficulty finding a product. The agent could suggest co-browsing, allowing them to see the same browser screen that the customer's sees and to interact with it such that they can personally guide the customer to the product they're looking for. This provides a great customer experience, as well as helping to speed up the interaction and find a faster resolution to the problem.

As discussed in the point above, canned messages improve chat efficiency by a quick search and click instead of repeatedly typing out common messages. It can also enhance professionalism by preventing typos and spelling errors during chat.

Similarly, a live chat platform that utilizes AI can also help improve your agents' efficiency. Agent Assist is an AI-powered virtual assistant which reads live chat conversations in real-time and suggests answers to your agents from your knowledge base, canned messages, and chatbot intents. Your agent can then select a suggested answer with a click of the mouse, allowing them to respond to customer queries more quickly, accurately and confidently.

Sometimes your agent won't know the answer to a question. This happens in every organization and is unavoidable. It's how you respond to this situation that will make you stand apart. When your agent isn't sure of the appropriate answer, they can flag the question. You can then easily see what question was asked, and particularly if it is being asked repeatedly, you are able to write an answer to it and upload it to your Knowledge Base. When a customer ever asks this question again, this answer will pop up for the agent to click and send.

When used correctly, these features can make a huge difference in customer satisfaction and speed of resolution. However, you need to make sure that your agents know how to use these features and in which circumstances. For example, although video chat may be helpful in certain circumstances, it could cause more problems than it solves in others.

*Find out more about intelligent live chat features that will improve your agent and customer experiences – page 113*

## Pro Tip

*Hold a lesson to teach your agents the different features of the agent console in your customer engagement platform, making sure they are comfortable using them. Give them time to practice with one another in role play.*

*To help your agents understand when it's best to introduce these features (be it audio, video, co-browsing, remote control, or canned messaging), hold an 'In their shoes' training session. Split your agents into two groups and ask them to take the viewpoint of one of your customers. Ask one group to imagine and script the best possible customer experience that could be had while using live chat for a range of real-life scenarios. Ask the other group to script the worst experience which could be had. Once done, ask them to share and question them on their decisions and use of different features to find a resolution.*



### 50 Customer Service Training Activities

This eBook contains 50 tried and tested customer service training activities featuring:

- Simple-to-deliver activities which require practically zero preparation or equipment.
- Marked focus to indicate the areas of learning an activity covers especially well, such as listening skills, energizer, empathy, etc.
- Suggested debriefs to help your team link activities to learning and apply the learning to the workplace

[Learn more](#)

# 3

## Live Chat Scripts and Writing Guides

There are no two ways about it: good customer service is hard work. It's a constant challenge to strike a balance between helpfulness and efficiency when you have so many customers to assist.

But improving chat service doesn't have to be difficult. Like how creating a great soup starts with homemade stock, you need a quality base to deliver the kind of customer service that has people coming back for more.

Whether your communications are over letter, email or any other text-based medium, this chapter has all the best tips, templates and ready-to-use scripts you need to write credible and impactful customer messages.

# A Complete Guide to Writing for Customers – Templates and Tips for Credible Communication in Key Situations

Communications with customers can make or break your business. Warm and persuasive words have the power to drive sales, build loyalty, and create lasting relationships for years to come. On the other hand, communications which miss the mark can annoy or even upset customers, driving a wedge between you and the customers you depend on for continued success.

Read this section to find out how to speak to your customer in every key situation and write the most convincing and persuasive messages. This section contains the following chapters:

- [6 Useful Examples of \*\*Apology Letters\*\* to Customers](#)
- [How to Write a \*\*Thank You Letter\*\* to Your Customer with Easy-to-Use Samples](#)
- [5 Things to Consider Before Drafting \*\*Sales Letters and Emails\*\*](#)
- [How to Write Powerful \*\*B2C Sales\*\* Letters and Emails, with 7 Real-Life Examples](#)
- [How to Write a Winning \*\*B2B Sales\*\* Letter in 7 Easy Steps](#)
- [Holidays, Birthdays and More – 20+ Letters to Customers for \*\*Special Occasions\*\*](#)

## 6 Useful Examples of Apology Letters to Customers

It takes [12 positive experiences](#) to make up for one unresolved negative experience. As much as we try and prevent them, negative experiences are still bound to pop up every once in a while. When they do, we can put our best foot forward and begin to make amends by apologizing to our customers.

Many companies dread writing apology letters to customers out of fear of admitting wrongdoing or accepting blame for an unpleasant situation. However, an apology is not the end of the world – in fact, it is far from it. When crafted properly, an apology isn't a liability, it's an asset.

A successful apology can turn a negative experience into a positive one, an upset customer into a loyal one, and a bad reputation into a great one. Here are some examples of apology letters for poor service so that you will know what to do should your business need to respond to a similar situation.

## Apologizing for Poor Customer Treatment

Did your customer lose an hour of their day being transferred from representative to representative to solve a seemingly simple issue? Is your customer **upset** after an experience with a rude and unhelpful employee or manager?

**70% of buying experiences** are based on how the customer feels they are being treated. No matter who is in the “right” in a complicated situation, it is important to give the customer a sincere apology. Let’s compare two examples of an apology letter to a customer who feels that he or she has been treated unfairly.

### Bad Example

*Dear Catherine,*

*I am very sorry for what happened. It was unacceptable and will never happen again.*

*The representative that you spoke with didn't actually hang up the phone – I was informed that he tried to transfer your call but it must not have gone through. Since the call dropped a second time, you might want to check your phone service provider. We pride ourselves on our service and would never do something like that.*

*Again, I am very sorry for the inconvenience. Please contact customer support for any further concerns you might have – our customer service agents are always very happy to help.*

*Sincerely,*

*Ashley W.*

In this example, Ashley was very vague when approaching the customer's issue. Instead of **empathizing** with Catherine, she tried to shift the blame to the customer's phone service provider and deny the company's role in Catherine's bad experience. In the end, Ashley left the issue unresolved, and the customer unsatisfied. Let's have a look at what happens when we try that again:

### Good Example

*Dear Catherine,*

*On behalf of [INSERT COMPANY NAME], I want to extend my sincerest apologies for the negative experience that you had with our customer service agent, Peter.*

*I realize that Peter was unhelpful in solving your issue, and that when you asked to speak with a manager, he hung up the phone instead of transferring your call. I understand your frustration at having not been properly directed to an on-duty supervisor, and your even greater frustration at having to wait on hold again, only for the call to drop almost half an hour later.*

*At [INSERT COMPANY NAME], we pride ourselves on giving our 100% every day to ensure that our customers' needs are being met. I know that we have let you down, and for that we are very sorry.*

*We do our best to train each of our representatives on how to properly handle our customers' issues, including how to escalate problems that they are unable to assist with. Your concern was not handled properly, and we are going to take steps to ensure that this situation does not repeat itself.*

*As of this Friday, we are going to require our customer service representatives to ask for a call-back number at the onset of each conversation in case the call drops. We will also be holding a mandatory review session to make sure our representatives are aware of the proper procedure for transferring calls.*

*I want to thank you for bringing this issue to our attention. We are always looking for ways to better our service, and your feedback is an invaluable part of that process.*

*Should you need help in the future, please do not hesitate to contact me directly, as I will be very happy to assist you personally with anything you need.*

*Sincerely,*

*Ashley W. – Customer Service Manager*

By being specific about what happened and addressing exactly what Catherine’s negative experience was, Ashley came across as compassionate and understanding of the customer’s issue. She validated and related to Catherine’s feelings, and showed her the steps that the company would take to ensure that the inconvenience would not happen again. She even gave Catherine her personal contact information so that she could reach her directly in the future. Great job, Ashley!

### Do

- Say sorry and express sincere regret
- Be specific about what happened
- Validate and relate to the customer’s feelings
- Show what steps your company will take to make sure the inconvenience won’t happen again
- Give your customer your contact information for extra measure.

### Don’t

- Be vague
- Make excuses or shift blame
- Leave the issue unresolved.

No matter what your customer service channel is, top performing operators always receive high customer satisfaction rate. Here is a practical guide for live chat agents to communicating effectively, addressing customer issues efficiently, and representing your brand professionally.

## Apologizing for a Damaged or Defective Product or Service

Acquiring a new customer is anywhere between **five and 25 times** more expensive than **retaining an existing one**.

When we are approached by a customer who is upset by a defective product or service, responding with a professional apology that offers the customer a hassle-free solution is an important part of ensuring customer retention. Which of these two example apologies do you think did it better?

### Bad Example

*Dear Zachary,*

*Thank you for contacting us about your defective Light Up Holiday Frame. I have refunded you for the inconvenience. If you would like to order a new one, please visit our website at [www.myholidayphotos.com](http://www.myholidayphotos.com), or call us to place your order over the phone.*

*Thanks, and I'm sorry again.*

*Sincerely,*

*Janis L. – Customer Service Representative*

In this first example, Janis seems to be looking for the quickest way to take Zachary's issue off her plate. She refunded him without further question and redirected him to the website, leaving him more likely to abandon his purchase given this annoying extra step. She also left him without a solution as far as what to do with the damaged product. Let's see if we can fix things with Zachary:

### Good Example

*Dear Zachary,*

*Thank you for contacting us about your defective Light Up Holiday Picture Frame. We are truly sorry that the item that you received did not function as promised. We understand your disappointment and apologize for any inconvenience that this may have caused you.*

*Before we ship any product, it undergoes several stages of quality checks. It is our intention to provide only the highest quality items to our customers, and we regret that your product slipped past our quality measures.*

*We have gone ahead and shipped you a new Light Up Holiday Picture Frame, which should arrive at your specified address in 3-5 business days. When you receive it, please return the defective frame in the enclosed box.*

*We understand that preparing for the holidays is a time-sensitive matter and will be sending you a coupon for \$10 off your next purchase in hopes of compensating for the inconvenience.*

*Thank you again for bringing this issue to our attention—please don't hesitate to contact with any further concerns.*

*Janis L.– Customer Service Representative*

This time, Janis provided the customer with a hassle-free replacement. She explained the company's procedures for quality checks, helping Zachary rest assured that he could expect his product to arrive fully functional next time. After gauging how upset Zachary was about his defective purchase, she went the extra mile to show him that his satisfaction mattered by offering him a complimentary coupon.

### Do

- Explain why the defect/damage was a one-time occurrence
- Provide the customer with a hassle-free replacement
- Gauge how upset the customer is – if needed, offer the customer a care token, such as a discount, to show that you care about their loyalty and satisfaction.

### Don't

- Make the customer take extra steps on their own that you could easily help them with, such as reordering a product
- Apologizing for Delayed or Improper Shipping.

There are several scenarios in which a customer might receive an item that was shipped late or improperly. Maybe an item that was reported as "available" on the website is actually out of stock. Maybe a snowstorm delayed shipment. Whatever the case, follow our next good apology example, and avoid the bad one.

### Bad Example

*Dear Alice,*

*We are sorry that you have not received your Rainbow Child's Ceiling Fan yet. The item has yet to arrive from our provider and unfortunately still has not been shipped from our facilities. Please check back in later with us to see if it has arrived.*

*Best,*

*Edward B.*

Here, Edward failed to give Alice any sort of information about what caused the shipping delay and when her product would arrive. By telling her to check back later, Edward created one unsatisfied customer who would find herself once again waiting in the dreaded queue for any answers. Let's try that again:

### Good Example

*Dear Alice,*

*We are very sorry that you still have not received the Rainbow Child's Ceiling Fan that you purchased from us on our website this past Thursday.*

*The demand for this popular item has exceeded our expectations, and our stock is depleted. However, we will receive a new shipment of fans next Friday, which we will expedite to our customers.*

*We understand that as a loyal customer, when you make a purchase you expect to receive your product in a timely manner. We know that we have let you down, and for that we are very sorry.*

*Please advise us on whether you would like to cancel your order or have us ship the ceiling fan once it becomes available. You can click here at any time for live shipping and service updates. Again, we apologize for this inconvenience.*

*Sincerely,*

*Edward B.*

*Customer Service Representative*

In this example, Edward explained the reason for the delayed shipment, and showed awareness and concern for the inconvenience that he knew it would cause Alice. He presented Alice with a plan to get her the product as soon as possible and gave her details about when it would be in stock. Finally, by including the link to shipment updates and tracking, Edward gave Alice the tools that she needed to accompany the progress of her order without needing to contact customer service again. Nice work, Edward!

## Do

- Explain why the shipment was delayed
- Show that you realize and care about the inconvenience that this may have caused
- Present the customer with a plan to get them their product as soon as possible
- Include a link to shipment updates and tracking.

## Don't

- Be vague about the cause for the shipping delay
- Be vague about when the customer will receive their shipment
- Apologizing for Billing Issues

Billing issues can be very frustrating for a customer who has placed an order with your company. Yet, it is a very common error. Should a billing issue arise, be sure to contact your customer as soon as it comes to your attention.

Here is a sample poor billing error apology, and how to fix it.

### Bad Example

*Dear Megan,*

*Thank you for contacting customer support. I am very sorry that you were charged twice for your purchase – I have no idea why that might have happened as it is not a common occurrence at our company. Regardless, please provide me with your credit card information so that I can complete the refund.*

*Thanks,*

*Katie F.*

*Customer Service Representative*

In this apology letter, Katie renounced responsibility of the billing error, and revealed a lack of expertise in her company's system by asking Megan to respond with sensitive information that was not needed to complete the refund (Check our tips in case you need to [say no to a refund request](#) from customers.) You can make this sort of apology more professional by writing the following:

## Good Example

*Dear Megan,*

*Thank you for contacting customer support. We are very sorry that you were charged twice for the same product. We understand that the mistake was on our end, and it is not a mistake that we take lightly.*

*According to our technical team, the error was due to a computer glitch in our automated billing system.*

*As a result of this issue, and in order to prevent this from happening in the future, new updates are being made to the system. In the meantime, we have refunded you the full amount of one of the charges, or \$49.99 plus tax. Please allow 1-3 business days for the amount to appear back on your card.*

*We hope that this will be sufficient to correct the error and address any inconvenience this may have caused you. Thank you for bringing this to our attention—it will help us improve our operations and services.*

*We very much appreciate your business. If there are any other issues that need to be addressed, please don't hesitate to contact us.*

*Sincerely,*

*Katie F.*

*Customer Service Representative*

This time, Katie's apology was sincere and precise. By telling Megan what was going on with the system, Katie made sure that she and the customer were on the same page. In refunding her quickly and without hesitation, Katie also spared Megan the worry and stress of wondering if she would ever get her money back.

### Do

- If possible, explain the reason for the billing error
- Provide the customer an immediate refund if double charged.

## Don't

- Renounce connection to or responsibility for what happened
- Ask your customer for information that you don't need
- Ask the customer to send you sensitive information online
- Apologizing for a Product Recall.

From canned food products to Samsung Galaxy's Note7 [recall](#), product recalls are a common source of both public and personalized customer apology letters.

Should your company have a product that needs to be recalled, use these example letters as guidelines to know what to do and what not to do when composing your own letter of apology.

### Bad Example

*Dear customer,*

*We are sorry for what has happened with our series of tuna cans, expiration dates February 2019 to May 2019.*

*Although we work extremely hard in producing products that our customers will love, the seafood industry can be tough. The contamination of the ocean waters with pollution sometimes means the contamination of the fish, an epidemic which has grown in recent years.*

*Even so, this is a one-time incident. We will continue to strive to be industry leaders, and will take preventative measures to make sure that this does not happen again.*

*To all of those who were affected, we are very sorry. We hope that you will continue to remain loyal to our brand.*

*Sincerely,*

*John Doe  
President and CEO.*

As you can see from this letter, John is an apology novice. He made excuses for his product, potentially frightened his customers with ominous details, and failed to provide his customers with a long or short-term solution. With a letter like this, why should his customers stay loyal to his brand? Let's see if we can change this up.

## Good Example

*Dear valued customer,*

*At [INSERT COMPANY NAME], our mission is to provide our customers with only the freshest, highest quality canned seafood products. That being said, our number one priority is the safety and satisfaction of our customers while consuming our products. I regret to say that our most recent series of canned tuna fell short on that promise.*

*Unfortunately, our series of tuna printed with the expiration dates February 2019 through May 2019, have been found to contain unsafe mercury levels. The fish that we use are caught wild and not farmed, and we test our products extensively before making them available to the public. We are very sorry that this series of cans has slipped past our quality standards.*

*While we regret very much this discovery, we are glad to open this line of communication to ensure the safety of our customers.*

*If you have in your possession any cans of tuna with these expiration dates, you can return them to the supermarket where they were purchased, or ship them free of charge to the following address for a full refund:*

*[COMPANY NAME]  
[COMPANY ADDRESS]*

*If you have consumed one or many cans of our tuna with these expiration dates, you do not need to seek medical attention, but it is advisable to not continue the consumption.*

*To our valued customers who were affected and unaffected alike, we are very sorry. We will continue to develop the products that our customers love, but with more extensive quality testing to ensure that this situation remains an isolated incident.*

*We thank you all for your loyalty over these 25 years that we have been in business—we will work hard to not disappoint you again.*

*Sincerely,*

*John Doe  
President and CEO*

This time, John excelled in letting his customers know that they are his priority. By evoking his company's mission statement, he simultaneously reminded buyers of **why they were loyal to the company** and characterized the recall as a rare incident. By giving his customers specific information on the recall and how to act, John took the first step in regaining trust between his business and his customers.

### Do

- Make your customer feel valued
- Present your company's mission statement and how this statement relates to the recall situation
- Give specifics about the recall
- Give affected customers exact information on how to act.

### Don't

- Make excuses.
- Frighten your customer with ominous details
- Give vague information that does not provide a solution
- Apologizing for Canceling a Service or Event

It is important for your company to apologize for the inconvenience that a cancellation of a service or event can cause customers. Like product recalls, cancellations can happen for a number of reasons, such as customer safety (such as with a flight), poor customer turnout or ratings (such as with a TV program), or the absence of a key participant in an event (such as in a workshop). Take a look at these final examples of business apology letters for cancelling a service or event.

### Bad Example

*Dear customer,*

*Unfortunately, the workshop that you were planning on attending was cancelled. We are very sorry for any inconvenience that this might cause.*

*We do our best to always deliver our workshops as scheduled. However sometimes things don't go as planned.*

*Please let us know if you have any questions or concerns regarding this cancellation and we would be happy to assist you.*

*Sincerely,*

*Brian C. – Event Manager*

In this instance, Brian's apology letter was very impersonal. It also left the customer unsure of if, when, or how he would recuperate the money that he paid for a seat at this event. Here is Brian's second try.

### Good Example

*Dear Alexander,*

*I am very sorry to inform you that our workshop, "Practicing Positivity: The Art of a Happy Work Environment," has been cancelled due to the hurricane that is set to land this Friday.*

*Because of the unsafe weather conditions, we will not be able to proceed with the event as scheduled. I am sorry for any inconvenience that this cancellation may cause. The safety of our guests and speakers is our number one concern.*

*We are hoping to be able to reschedule this workshop for a later date, and will send you an email as soon as we have worked out the details regarding this change. For now, we are issuing refunds to all our guests who were planning on attending this event. You should see the total value of your purchase returned to your bank account in 1-3 business days.*

*We want to thank you very much for showing interest in our event—your purchase helps us plan future workshops and events. Please [click here](#) to see our schedule of upcoming workshops this month.*

*Sincerely,*

*Brian C. – Event Manager*

This time, the apology letter was specific about the events surrounding the cancellation. Given both the quick reimbursement and the mention of rescheduling the event, Brian left Alexander with a good impression of his company's efficiency and organizational skills. By including a link to the schedule of upcoming workshops, Brian managed to turn this letter of apology into an opportunity to promote future events.

### Do

- Show your customer that they are a vital part of your company's success
- Reimburse your customer immediately
- Let your customer know if and when the event can be rescheduled
- Offer your customer other options.

### Don't

- Keep the reason for the cancellation from the customer
- Leave your customer unclear as to when and how they will be reimbursed.

## A Final Word on Apologies

When we write an apology letter to a customer, we are forced to reflect on our mission statement and brand identity, and to address how we are or are not meeting the customer's needs. Ultimately, by crafting the perfect apology letter we show that we are willing to address life's difficult moments head-on, and to put **customer satisfaction** first and foremost.

Check your company's past apology letters and see how they compare to these examples. It's never too late to become an apology master.

# How to Write a Thank You Letter to Your Customer with Easy-to-Use Samples

Another Thanksgiving has come and gone, but that doesn't mean you've missed your chance to be thankful. In fact, if you're going to run a successful, customer-centric business, it is important that you express gratitude towards your customers regularly.

Here are important tips for writing a thank you letter to your customer, complete with sample thank you letters to help you show your customer how much you appreciate them.

## Why Thanking Your Customer Pays Off

Thanking your customer is one of the golden rules of businesses. Cashiers thank customers for stopping by the store. Pilots thank customers for flying with them. And websites thank customers for their purchase. But it's not just business — saying thanks is an important part of any social exchange. It's so integrated into our society that any degree of positive action often warrants some sort of thanks.

The reason behind our social obsession with thanking each other is the same reason why thanking your customer pays off: the rule of reciprocation.

The rule of reciprocation is simple. When someone does something nice for us, we are programmed to want to return the favor. So if a company takes the time to thank and nurture its relationship with us, we feel compelled to return the favor in how we spend our money.

While a simple "thank you for your purchase!" on your website is unlikely to inspire lifelong loyalty, writing your customer a thank you letter is just the kind of personalized, thoughtful, and time consuming action that will inspire reciprocation — hopefully in the form of repeat business and word-of-mouth advertising.

Studies show that [68% of customers](#) stop dealing with a company because of what they perceive as indifference (this, to customers, breaks the rule of reciprocation). Thank you letters are an important part of making your customers feel valued, and letting them know

how much you appreciate them. They are an inexpensive way to increase sales, return on investment (ROI), and customer retention.

## What to Consider When Writing a Thank You Letter to Your Customer

Ready to send your customer a thank you letter? Here are some things to consider before your pen hits the paper:

### Who is your audience?

Consider who is on the receiving end of your letter (in other words, who is your customer)? Are they a business or a person? A loyal customer or one who has just joined the family? Are you writing to one special customer or many?

### What are you thanking them for?

Consider the content of your letter. Have they recently made a purchase from you? Did they give you feedback on an important issue? Did they contact your company for support?

### How are you going to thank them?

Consider the format of the thank you letter. Are you going to handwrite your letter or type it up? Is it going to go on paper, or in a card? Will it be a letter per se, or more of a thank you note? Is it appropriate to send an additional token of your appreciation along with the letter (a discount, a fruit basket, etc.)?

## Tips for Writing a Thank You Letter to Your Customer

When writing a thank you letter to a customer, be sure to do the following:

### Be Timely

Customers value timely action, which is why the sooner you send your thank you letter, the better. A quickly sent thank you letter says that even though you are a busy person, you

can take time out of your day to make your customer a priority. It also ensures that your customer will remember the conversation or action that you are thanking them for.

Sending a timely thank you letter to your customer isn't only beneficial to them as the recipient: it's also helpful for you as the writer. When you send a thank you note promptly after an interaction, details of the exchange will still be fresh in your mind. That means you can write a more personalized, valuable thank you letter than you could were you to do so a week or two later.

## Be Clear and Concise

A good business thank you letter should be relatively brief and to the point. You want to say thank you without overwhelming your customer with information, or unsightly blocks of text.

That being said, don't necessarily steer away from longer letters if the situation (or your writing style) calls for it — just do your best to make sure that your thoughts are well-defined, meaningful and organized!

## Tell Them Why You're Thankful

When telling your customer why you are thankful, specificity is key. What is it that makes this particular customer special? What have they contributed to your organization? Being specific in your thank you letter will naturally make the letter more personalized, and heartfelt. For example, instead of writing something like this:

## Be Sincere

People are great at sniffing out insincerity. We can sense it a mile away (or even perceive insincerity where there is none). That's because we value real, quality, exchanges with one another. Your customers are no different — which is why if you're writing to show them your gratitude, it's important that you mean it.

One great way to convey sincerity is to avoid self-promotional material in your letter. Your tone and word choice is also crucial. Don't write a thank you letter to your customer that is overly formal or stuffy. Avoid generic statements that make your letter sound like you copy and pasted it. And, be sure to follow our next point.

## Talk Human to Human

One thank you letter from a real person is worth more than a billion automated ones.

Greet your customer by name — never with “dear valued customer.” Connect with them as an individual, not as a company (companies are, after all, made up of people). You can do this by using the personal “I” rather than a corporate “we.”

Don't be afraid to show emotion in your thank you letter — using an earnest, human tone can help you win big sincerity points. At the end of the letter sign off with your name.

## Convey Warmth

A big part of what makes a thank you letter truly valuable is the amount of warmth it conveys. Being warm is all about being compassionate, open, and approachable. This too, you can achieve with the right words.

## Use Humor

A funny or clever thank you note can get double the mileage that a regular one gets. If you can think of a way to use humor organically in your thank you note, you can get extra points from your customers, and potential publicity on social media.

Here are some of the do's and don'ts of using humor in your business thank you letter:

### Do

- Use humor sparingly where it makes sense within your thank you letter
- Be humble/subtle with your humor — remember, this card is about thanking your customer, not showing off
- Use humor as part of a thank you card design.

### Don't

- Force humor — it can come out awkward for everyone involved
- Use humor at the expense of the customer — you don't want to risk offending them when you're supposed to be
- Send a Token of Your Appreciation.

Sometimes actions speak louder than words. If you want to truly wow your customer, consider throwing in a little something as a token of your appreciation.

This can be something small, such as a voucher for a free item, stickers, a patch, or another symbolic bonus item. Or, it could be something larger, such as a gift card, fruit basket, and more. Gifts that are a bigger investment can prove profitable by solidifying important business relationships and/or giving you free publicity. The key to any token of appreciation is making it personal and relevant to the individual.

## Write by Hand

Now more than ever, many people have fallen out of custom of writing or receiving handwritten letters. Which is why writing a handwritten thank you letter or card can set your business apart an extra mile.

Handwritten notes are the ultimate indicator of time you put into that customer.

If you don't like your handwriting don't worry. Everyone's handwriting is unique, and that's part of what makes handwritten letters so special — they feel authentic.

## Use a Card or Stationery

What's better than a thank you letter to a customer on white paper? A thank you card. By incorporating a simple, visual design, you are showing your customer an extra layer of thoughtfulness. One way that you can do this by purchasing premade thank you cards or stationery. Another is by designing your own custom thank you cards that are unique to your company.

If you choose to go this route, make sure not to design anything that's too flashy or that shows off your company too much. A subtle use of your company logo is fine, but remember: you're trying to thank your customer, not shove a promotion in their face.

## Send Smartly

The same fate that junk email meets can also happen to junk snail mail: going straight into the trash.

Send your thank you letter smartly so that your audience will be enticed to open it. For

example, a handwritten envelope is more attention-grabbing than a typed, corporate envelope. If you are using fun stationary or a thank you card, you can also get a catchy envelope to match.

Another way to guarantee reception of your thank you note is by grouping it in with an order or package. Your customer will already be happy to have their package and will receive an extra lift when they find a personalized message of gratitude in the contents.

## Types of Thank You Letters with Samples

Use these thank you letter samples to create your own winning thank you letters, notes, and cards.

### Thank You for Contacting Us (Lead Acquisition)

*Hi Lucy,*

*Thank you for contacting us on Friday about our software! I'm glad that I could help clear up any doubts about how the program works, and whether your business would be a good candidate for our trial.*

*If there's anything you need, feel free to contact me personally. I'm always happy to help. I hope you and Emily enjoy the holiday!*

*Thanks again!*

*Chelsea*

*1-800-CONTACT*

*[Contact@me.com](mailto:Contact@me.com)*

### Thank You for Signing Up/Following Us (Customer Onboarding)

*Dear Alexander,*

*Thank you and your team for joining us here at Website.com! It was a pleasure meeting you Thursday and having the privilege of walking you through the sign up process. You and your team had excellent comments, and a great vision for building your site — I'm excited to work with you and see what we will come up with together!*

*Sending my best,*

*Sebastian*

## Thank You for Letting Us Know About an Issue (Customer Feedback)

*Dear Gabriella,*

*Thank you for the comment you posted to our Facebook page about the problem during the checkout process on our website! It wasn't just you — when we checked it out we got an error message, too! Fortunately, our tech team began investigating as soon as we read your comment, and now the process is smooth sailing again. We're listening, and we owe you one!*

*If there's anything at all you need from us, just give us a shout! Your feedback is a vital part of perfecting the service we work so hard to bring our customers.*

*Thanks again and have an awesome day,*

*Aaron and your friends at Blue Shoes*

## Thank You for Your Loyalty (Customer Retention)

*Dear William,*

*Wow, I noticed that you've been our customer for 5 years! Thank you so much for sticking with us — it's people like you that keep our wheels turning!*

*I've enclosed with this card a voucher for a free ride on our bus line. You can use this voucher any time towards any destination: like our love for you, it never expires.*

*We look forward to serving you again soon!*

*Madeline*

## Thank You for Your Purchase (Sales)

*Dear Dave,*

*Thank you for purchasing our camping hammock! Your purchase means the world to us — we love it when new customers give us a shot! Here's to hoping we make you proud. If there's anything I can do for you in the future, please let me know — I'm all ears!*

*Yours truly,*

*Suzanne M.*

*1-800-CONTACT*

*[Contact@me.com](mailto:Contact@me.com)*

## Thank You for Your Donation (Non-profit)

*Dear Lucia,*

*I wanted to thank you personally for your donation to the Wildlife Freedom Fund. The money you gave us is going towards building a wildlife reserve in India. We have already acquired the land, and are currently building facilities to give neglected street animals with mange the treatment, love and care that they so desperately need. And we owe it to you!*

*Enclosed is a photo of the property, and of Parker and Aalia — the latest members of our furry family.*

*Thanks a million — from our team and the animals!*

*Sam and your friends at WFF*

## A Word on Thanks

Each thank you letter that you write to your customers is a little **gift** of time, thought, and effort. We hope that these tips and thank you letter samples will help you pull together a message of gratitude that will win you customers for life.

# 5 Things to Consider Before Drafting Sales Letters and Emails

There are many different types of sales letters and emails. And a quick internet search will show you that there are many different approaches you can take to writing them. Here's what to consider when preparing your own sales letter or email:

## 1. Who Is Your Audience?

You aren't writing your sales letter or email to everyone. To write the best sales letter you can, it's important to remember who you're writing to, and appeal specifically to your target audience.

Are you writing to a current customer or a prospective one? A corporate decision-maker or a consumer? Are you writing to one or to many? What is the age range, common interest, or necessity of your audience?

Knowing your intended audience will help you make several important decisions about the tone, content, presentation, and personalization of your letter.

If you are selling B2B, or [business-to-business](#), remember that your sales letter will be part of a longer decision-making process, involving a greater number of involved stakeholders. You may have to speak to multiple decision-makers and will likely draw from a smaller pool of leads. When writing B2B sales letters, it is important to draft shorter, more personalized letters that are a part of an ongoing conversation.

If you are selling B2C, the decision-making process will be briefer, as consumers tend to have less money on the line than corporations (and fewer shareholders to consult). Your relationship and correspondence with the consumer will likely be more limited than in B2B sales. If you are selling with the B2C model, you may want your sales letter to be a little longer in order to persuade your customer to take up your product in a single contact. You might also send the same sales letter to hundreds of customers, meaning that it will not be as personalized as B2B sales.

When writing your sales letter or email, remember that people read what is interesting and useful to them. By keeping your audience in mind, you will be able to write a relevant, effective sales letter.

### Pro Tip

*Put yourself in your readers' shoes as you plan your sales letter. What would you want to hear to convince you to make a purchase?*

*When deciding on your letter's tone, remember who you're writing to. B2B letters often work best if they're formal, while B2C letters can be more conversational.*

## 2. What Is the Purpose of Your Letter?

What is your intention with this sales letter or email? Is it to try and convert a lead? To spread awareness of a recent promotion? To follow up on a sales pitch? To get money for an active fundraiser?

Knowing the purpose of your letter will help you establish your offer ahead of time. Being very clear on what you are selling will help you convey that clearly to the customer and avoid confusion. Reflect on the purpose of your letter to keep your content concise and to the point.

### Pro Tip

*To keep the purpose of your letter clear, organize your letter effectively. Give your letter an introduction, a body, and a conclusion, and make sure that all elements of the letter serve your ultimate goal: to sell your product to your reader. When writing a sales letter or email, consider using a heading or subject line to convey your purpose.*

### 3. Long Copy or Short Copy: How Much Should You Write?

There are two main types of sales letters and emails: long copy and short copy. But which one is better for what you are trying to sell?

In general, short copy sales letters are around one to two pages. Long copy sales letters can have anywhere from two to 20 pages (or even more if necessary).

One of the best things about long copy is that it allows you to answer more questions and remedy more customer doubts. Long copy often works well for products that require a greater explanation of value, how they work, and proof of results. Short copy, on the other hand, can work well for selling to informed customers, or for selling products that are self-explanatory. Short sales copy may also work well for follow-up letters, and letters that entice a follow-up action in order for the reader to get access to information (such as setting up a phone call to go over options, for example).

If you still aren't sure about whether you should write a long or short copy sales letter, ask yourself whether you have a [need-to-know](#) or a [want-to-know product](#).

A need-to-know product is a product that your target customers already feel they need, so you don't have to take as much time or letter space to persuade them to buy. Short copy does best for need-to-know products. These products might include clothing, household services (such as lawn care, house cleaning), food deals, auto care, and more.

A want-to-know product is a product that you must convince customers to want to know more about. Long copy works best for want-to-know products as they are non-essential but a letter or email can persuade your audience that they are necessities. To sell want-to-know products, you need more letter space to create a desire for that product where [none existed](#).

#### Pro Tip

*Many copywriters report that [two-page sales letters](#) tend to work best for most of their B2C clients. However, always [write as much as you need to write](#), and no more. If adding another section to your letter will make it more persuasive, then go for it. If lengthy user testimonials will make the case for buying your product, then put them in.*

*Don't bulk up your letter with fluff just for the sake of length. Long-winded, empty, or uninteresting information can end up putting your readers to sleep rather than persuading them to buy. Be aware of any points that serve only to make your letter longer without strengthening your argument. Quality is always better than quantity.*

## 4. Sales Letter or Sales Email: How Are You Going to Send Your Letter?

What is the best way to send your sales letter? The advantage of sending sales letters through email is that it's cheaper, faster, more convenient, and more easily quantifiable. With emails, you can measure engagement, track replies, and schedule delivery times. You can then use any of the information gathered to plan follow-up contact and adjust your sales strategy accordingly.

However, mail has its advantages too. Many customers and executives report [suffering from email overload](#) and see letters – especially personalized ones – as something that stands out. Many recipients also have email systems that filter out “junk” mail, potentially reducing the visibility of your sales email.

The physicality of mailed letters is another one of their benefits. While emails can be disposed of in a matter of clicks, people have to physically handle mail before dismissing it. Traditional mail also gives businesses the option of sending in small freebies to further incentivize the reader, such as a free edition of a magazine, a pin, a catalog, a pen, or more. While email is best used for short sales letters, physical letters can more easily accommodate any length.

### Pro Tip

*When sending a sales email, remember that half the battle is creating an interesting subject line that will entice readers to open, rather than ignore, your email. When sending a physical sales letter, try and make your letter stand out from the rest of your recipients' mail. You can do this by using some eye-catching detail on the envelope, or ideally, by making your letter as human and personalized as possible (such as by hand-addressing the envelope). Track the delivery of important sales letters through the post office to make sure they arrive at their destination.*

## 5. When Should You Send Your Sales Letter or Email?

Sending a sales email is all about timing. The problem is, studies often disagree about when is actually the best time to send sales emails. According to a Hubspot study, [Tuesdays around lunchtime \(from 10:00 am to 12:00 pm EST\)](#) are the best day and time to send sales emails. Another study by Yesware, which focused on explicitly measuring B2B sales emails, argues that [weekends are 10% more likely](#) to result in open rates because 80% less marketing emails are sent on weekends (this means less competition for your reader's attention). The times that Yesware recommends sending B2B emails are early mornings (from 6:00 am to 7:00 am) or evenings (around 8:00 pm).

### Pro Tip

*The best time to send an email will depend on whether you have B2C or B2B clients, what time zone your clients are in, and the nature of your sales email. Use your email engagement metrics to discover the best time for to send your unique sales email.*

### Conclusion

Once you have made these considerations, you will be clear in your purpose, your audience, and your methods for writing your sales letter or email. With your planning finished, writing will come easily.

Whether you are writing a B2C or a B2B sales letter or email, we hope that this chapter has given you a few helpful considerations to mull over, and new ways to consider planning your sales strategy.

# How to Write Powerful B2C Sales Letters and Emails, with 7 Real-Life Examples

Imagine this: two sales letters are sent out to the same customer from two different companies. Both companies offer a product that fills the same need and send the letters on the same day of the week. But somehow, one sales letter ends up open on the customer's desk – the other gets tossed in the garbage bin after a mere skim. A similar fate befalls two sales emails: the customer opens and even replies to one, while the other is erased almost as soon as it's received.

Why does the customer consider one and chuck the other? There are many possible reasons, but they all boil down to the same thing: how well the sales letter or email is written and presented.

A quality sales letter or email can put your company on the radar of new potential buyers. It can help you re-stimulate inactive leads and convert your leads into customers. On the flip-side, a poorly written sales letter or email can result in wasted resources and can even have a negative impact on your brand image.

We've written this chapter to help you make sure that you are writing the right kind of sales letter: the kind that your customers will open and act upon. Use this step-by-step guide with real-life samples to write a sales letter or email that will persuade your prospective B2C (business-to-consumer) customers to buy your product.

## Format Your Letter

Many sources recommend formatting your sales letter the way you would a normal letter. That means starting with the date and the contact information of both you (the sender) and the recipient in the upper left-hand corner. An optional heading may also precede the greeting.

With sales emails to consumers, you also have the option of playing with designs, links, and graphics. Images and GIFs can be used successfully if they help you communicate with your audience. Just don't go overboard – you don't want to take the focus away from your email's written content.

## Tips

*Use white space abundantly! Add spacing between lines to break up text in sales letters and emails to make them more readable and guide your reader's eye down the page.*

*In emails and letters to consumers, use bold text, underlines, and italics to call your audience's attention to your most important points. Use these elements selectively and avoid WRITING IN ALL CAPS – this can make your sales letter look spammy.*

## Write the Subject Line or Heading

While not all sales letters have headings, all sales emails must have a gripping subject line. The best email subject lines are compelling. They may contain a call to action, an intriguing question, a cryptic proposal – or really anything that might appeal to your recipient's interests (or curiosities!).

Here are some examples of email subject lines that work:

### Want to increase website traffic?

Ask your audience a question that they want to know the answer to.

### Tired of not achieving your goals?

Present the problem while hinting at a solution.

### If you're struggling with insomnia, you're not alone.

Show your prospect that you know them and what they are going through while offering a sense of community and a glimpse into your expertise.

### Be the writer that your colleagues aspire to be.

Appeal to your readers' competitive side and get their imagination going.

## Can I help?

"...With what?" Appeal to your reader's curiosity.

## Your free 3-day meal plan is here.

Use the word "free" to spark interest.

## Alex, do you have five minutes to talk?

Use your recipient's name to stand out, while letting them know you won't take much of their time. This also sparks the question, "Talk about what?"

## I can boost your savings by 10% in 10 minutes

This headline has an interesting proposal that you can allegedly learn fast, leaving the reader tempted to read on.

Unlike sales emails, by the time the user gets to the heading of a sales letter, the letter has already been opened. Headings for sales letters should reflect a specific, enticing promise that is relevant to the letter's content, and inspires the recipient to read on.

### Pro Tip

*In sales letters, place your heading beneath the logo to help both stand out. Be careful not to write an email sales letter subject line that is too spammy. Headlines like "FREE 100% GUARANTEED IT REALLY WORKS!" practically guarantee that your recipients will delete your sales emails without even opening them (and may land you in the junk folder anyway).*

## Address Your Reader

Whether you stick with a simple "Dear Reader," or address your recipients by name is up to you. However, these are not the only options for addressing your readers. Here are some of the ways that real sales letters have addressed their target audience:

- “Dear Reader,”
- “Dear Friend,”
- “Dear Artist,”
- “Dear Fellow Music Lover,”
- “Dear Bird Lover,”
- “Dear Gardener,”

Depending on your brand’s persona, you can also use a bit of humor to address your readers and spark intrigue. In one sales letter, [The New York Review of Books](#) uses the following greeting: “Dear Intellectual Dinosaur.” This greeting brings the magazine’s on-brand use of [sarcasm with empathy](#) into the creative recognition of its reader. By inviting its prospective customers to participate in the joke, The New York Review of Books generates a sense of confidence between the reader and the brand.

## Pro Tip

*Make sure that however you are addressing your readers is natural and on-brand – don’t force anything that is unlike your brand, or readers may feel put off by it.*

*In sales letters, instead of settling for “Dear Reader,” use other ways of addressing your target B2C audience to make them feel like part of an elite, appreciated group. In sales emails, it is normal to address the recipient by their first name, since these are easy to send out with a quality marketing automation software.*

## Hook Your Reader

Your heading (or subject line) and greeting can get your prospective customer’s attention, but they can’t hold it. That’s why like high school essays, sales letters also need a gripping “hook”, or in other words, an interesting opening sentence.

A quality hook does just what its name suggests: it “hooks” the reader and keeps them from ditching your sales letter before they even get to read your offer. In sales letters and emails, the hook sentence often stands alone in its own line.

For an example of this, let's look back at how More magazine begins their sales letter:

*"Dear Girlfriend,  
Maybe you've heard of them."*

More's hook sentence, "Maybe you've heard of them," does exactly what it's supposed to do: It makes its audience want to keep reading to answer the question, Maybe I've heard of who?

Here are some of the ways that you can hook your prospective customers into your sales letter or email:

**"For as little as..."** – Entice with the price

**"We're happy to introduce..."** – Draw in with novelty

**"Did you know...."** – Present a question

**"Are you having trouble with..."** – Ask about the problem

**"Maybe you've heard of..."** – Appeal to curiosity

**"What if you could..."** – Paint an idyllic picture

**"If you are the kind of person..."** – Establish expertise in your audiences' reality

**"There are over 9000 species of birds on our planet..."** – Share a statistic

**"Busy is as busy does..."** – Use an idiom, saying, or quip

**"The polar ice caps have melted faster in last 20 years than in the last 10,000...."**  
– Boldly illustrate the problem

**"Growing up, a teacher once told me that my performance was so bad, I made her want to quit teaching..."** – Relate to the reader on a human level with an interesting personal anecdote.

## Tips:

*Your hook should be a line that you find interesting (and that your customers will too). Write a few different ones out and see how each one sits with you.*

*For long copy sales letters, the hook almost always ties into the overall story that you are trying to tell. Keep your story in mind as you write your opening line. Standalone and to-the-point hooks are good for short sales letters and emails, where you don't need a long anecdote to keep the reader's attention.*

## Build Your Story

Once you have your hook established, it's time to expand into the overarching story that your sales letter is trying to tell.

Like the hook, the story is about keeping your prospective B2C customer absorbed in your sales letter. However, your story also has the function of creating an interest in or a need for your product. It takes your reader on a journey through your product's history, its function, who it serves and/or what it offers.

## Pro Tip

*Stories sell – just not to everyone. Some short sales letters and emails for need-to-know products may not require or even benefit from an overarching story, and that's okay. If you are selling a straight-forward product and would rather cut to the chase, then go for it.*

*Keep your story alive by using active voice; keep it interesting by using memorable images and unexpected word combinations. Keep your story relatively short and to the point.*

## Present Your Product

Once you have told a story that resonates with your audience, you can move on to presenting your product. The product can be introduced in a number of ways. It might be

evoked as a solution to the problem presented in the story. It might arrive as a bold promise made to the reader following an idyllic picture. It might appear in response to a portrait of the target audience (i.e. “You care about \_\_\_, you’re this kind of person... this product is for people like you”). The product can be presented in any way so long as it corresponds with the story told in the introduction.

Once you have introduced your product, you can begin to delve further into why your customer needs it. Here, you can explain the product’s benefits, your business’ practices (if this would be of interest to your audience), and the kind of experience they can expect to receive from your product.

When telling your customers about your product in a short copy sales email or letter, consider using a bulleted list to guide the reader through your product’s top benefits. With sales emails, you might embed a video or a link to help deliver that information.

## Pro Tip

*When selecting which of your product’s benefits you will include in your sales letter or email, put yourself in your customer’s shoes. What would you want to hear if you were the customer? While you may be tempted to mention every amazing thing about your product will all of those things be of utmost importance to your audience?*

*Rather than compiling a large list of product’s robust features, make your sales letter or email about the customer. How will the product benefit your target audience?*

## Make Your Offer

Once you have taught your customer about your product and instilled the need for that product, it’s time to make your offer. What exactly will your customer get, and for what price? The offer should be clear, concise, and leave the customer aware of what to expect from each option.

In long copy sales letters and emails, the offer is often made close to the end of the letter.

However, in short copy sales letters and emails, the offer can be made as quickly as the opening line. This is especially true and works well for companies that are offering a low-cost, useful product that needs little introducing. In these instances, the price is so good that it is used as the clincher that pulls the reader in. Here is one example of how this might work:

*“Dear Reader,*

*For as little as \$7, you can have home-cooked meals delivered to your doorstep.”*

Since this offer comes before any explanation, readers then need to read on to learn about the product and what that \$7 investment would get them.

## Pro Tip

*Word choice makes a difference. Use key words like “only,” “as little as,” “take advantage of,” “value,” and “save,” to make your offer more compelling.*

*Use multi-tiered offers to give your readers more options to choose from, and to sway them toward more expensive but better deals.*

## Inspire Immediate Action

You aren't sending out a sales letter or email purely to be consumed. You want your prospective customer to react, and to engage with you.

Follow up your offer with a clear call to action. Do you want them to mail in an order form? Set up a phone call? Contact you for more information? Initiate a trial period?

Be specific about what you want, and how the customer should do it. Don't leave any room for hesitation or doubt. If you want your customer to mail back an order form, make sure that you include an envelope that is postage-paid, so that they won't have anything to stop them from doing what you've asked. If you want a fast, direct reply, make sure you give your potential customers multiple options for contact. If you want to arrange a phone call, ask your customer to let you know what time you can reach out. If you want your customers to

initiate a trial period, tell them exactly where to click to get started.

Here is an example of a call to action in a [sales letter by American Express](#):

*“Why not apply for card membership today? All you have to do is fill out and mail the enclosed application. As soon as it is approved, we’ll send along the card, without delay.”*

This call to action makes the process of filing for an American Express credit card seem so easy, it’s just a matter of “well, why not?”

Here are some of the ways that you too can inspire immediate action from your readers:

**Give a deadline** – *“Just shoot us a reply to this email address, and we’ll put you on the list for our next seminar. And don’t forget, this offer expires February 15th!”*

**Throw in a bonus offer** – *“Act now and get our collection of 80’s love songs absolutely FREE!”*

**Use a scarcity mindset** – *“Because there has been such high demand for this product, our stock is limited. Don’t miss out on this offer – Act now!”*

**Tell customers: it’s easy!** – *“All you have to do is click on the link below, and we’ll set you up with your free trial!”*

**Tell customers: you’re almost there!** – *“You’re so close to being able to more effectively manage your time. You can still access your free trial...”*

## Pro Tip

*Action can come in all forms: a click, a response, a call, a purchase. Make sure to keep tabs on engagement – especially with sales emails – and to follow up accordingly. (For example, if a customer clicks on the link for the free trial but then navigates away, you can send a follow-up email to help ease their doubts or reignite interest.)*

## Supercharge Your Persuasion

Remember the doubts that your audience will be facing when they read your sales letter or email. These may include some of the [following](#):

*"You don't understand my problem."*

*"How do I know you're qualified?"*

*"I don't believe you."*

*"I don't need it right now."*

*"It won't work for me."*

*"What happens if I don't like it?"*

*"I can't afford it."*

When writing your sales letter or email, don't be afraid to pull some tricks out of your persuasion bag to convince readers otherwise. Consider adding attractive bits like the following to convince your reader to take the sales plunge:

### "Satisfaction guaranteed."

Buyers want to know that they won't be stuck with a product they end up not liking. Guaranteeing satisfaction often makes prospective customers feel more secure about trying out a new product.

### "No obligation."

Like guarantees, making something no-obligation immediately alleviates your buyer.

### "Free!"

Free anything is a big win in the customer's mind. Whether you're offering a free trial, a free edition of a publication, a free bonus add-on, or buy-one-get-one free, the word "free" is persuasive in any form it takes.

## “It’s worth \_\_\_\_, but you get it for \_\_\_\_!”

Consumers like to hear how much something is worth, and how they are getting it for cheaper than they should. Tell your customers that you’re giving them a special deal, and they might respond with purchases.

## “Imagine”

It’s been said that the word “imagine” is one of the most **powerful** words in sales. Use it to energize action, and to help your readers picture where they could be with your product.

## Testimonials

Whether you collect your testimonials from famous people or people just like your audience, you can be sure that testimonials often make a good case for purchasing.

## Expert knowledge

Use statistics, credentials, and a profound knowledge of your ideal buyer to show your audience that you are an industry expert. This will improve your letter’s believability, and help you gain more trust from readers (using a human tone when writing can help with this, also!).

## Promises

Promises are bold moves that put your name on the line. Is there any gain that you can promise your customers your product will bring them, or their money back?

## Timelines

How fast can your product get out? When can your readers start their trial? How long will it be before your product gets them the results that they want? With a fast timeline, you will attract more sales.

## Photos

Sometimes pictures are necessary to help prospective customers see a before and after, or better visualize what they can expect. If photos work for what you’re trying to sell, use them!

Use these sales tactics when you can, but don't compromise the quality of your letter or email by forcing them in there. Take what serves you and leave the rest.

## Pro Tip

*Different sales tactics work best with different audiences and different products. Consider what will truly help your products case before pulling all the sales ropes.*

## Sign Off and Add a P.S.

Once you have addressed all your main selling points, wrap up your letter with a conclusion. Tie up any loose ends, tackle any last doubts, and make your final references to your selling story. Once your letter is done, don't forget to sign it with your name and your company title (the latter is optional).

Oh, and don't forget your P.S.

In sales letters and emails, the postscript is the last chance to say something that will inspire your reader to buy. The P.S. could be used to throw in a final incentive to act – such as an additional discount or freebie. It could also be used to remind the reader of an important selling point.

## Pro Tip

*In the conclusion, reference your story (if you have one) one final time to bring the letter together.*

*Go easy on the P.S. – sometimes, unlike in Prevention's case, less is more.*

*Once you have made these considerations, you will be clear in your purpose, your audience, and your methods for writing your sales letter or email. With your planning finished, writing will come easily.*

*Whether you are writing a B2C or a B2B sales letter or email, we hope that this chapter has given you a few helpful considerations to mull over, and new ways to consider planning your sales strategy.*

# How to Write a Winning B2B Sales Letter in 7 Easy Steps

When selling to businesses, sales emails and letters are an effective way to pique corporate interest in your product. They aren't as pushy as sales calls or as time consuming as presentations. They give corporate decision-makers a tantalizing glimpse into what your product might offer them, while also laying the foundations for what could grow to be a valuable business relationship.

The problem is that business decision-makers and CEOs are busy people with limited time to spend shuffling through sales letters and emails. As a result, despite their successful history, many B2B (or business-to-business) sales letters and emails go unopened or get trashed after a mere glimpse.

So, what's a salesperson to do? How can we beat the mighty trash bin, and actually have a shot at selling to our corporate leads?

The secret to successfully using sales letters and emails in your B2B sales strategy is simple - you need quality content and expert presentation. Use the steps laid out in this blog post to write winning sales letters your peers will wish they had sent.

## 1. Format Your Letter

When formatting your sales letter or email for correspondence with business executives, it's important to be as clean and professional as possible.

B2B sales letters should follow a standard formal layout. Put your name and company's address in the upper left-hand corner, followed by the date and the recipient's name and company address. Follow that with your optional heading and your salutation. Together, this should look like so:

Just as sales letters to corporate decision-makers and CEOs should be formatted like regular letters, B2B sales emails should be formatted like regular emails.

In both letters and emails to corporate decision-makers, it's important to use this simple,

non-commercial format to give your correspondence a more personal feel. By avoiding busy stationary and marketing templates, your letter will give the impression of two people connecting, rather than that of a salesperson trying to mass-convert leads.

## Pro Tip

*Try and keep your B2B sales letter to a page, max. This will help you keep the letter clear, concise, and compelling, without threatening to take up too much of your lead's time.*

*B2B sales emails should be brief, like the example above. Keep sentences short and easy to read.*

*Include your logo or corporate signature in your sales letter or email for a subtle on-brand touch.*

## 2. Write the Subject Line or Heading

The main parts of a B2B sales letter or email are the following:

- Subject Line or Heading
- Greeting
- Opening Line (Hook)
- Body Copy
- Closing Copy
- Sign-off (and Optional Post-Script)

These elements are similar to what makes up a B2C sales letter or email. Still, they will be crafted distinctly when selling to a corporate decision-maker.

When writing your subject line or heading in a B2B sales letter or email, make sure that it is intriguing and relevant to your proposal. Think about how busy CEOs and business executives are – as unfortunate as it may be, your email or sales letter will be competing with much more pressing matters.

Here are some example subject lines or headings that appeal to corporate decision-makers:

*I'd like to work with you.* – This example works as a letter's heading or an email's subject line. By vaguely stating your objective up front, your recipient will be more inclined to hear you out, should this intention intrigue them.

*A solution that works for both of us.* – "How?" the reader asks. This example heading or subject line gives the recipient a peek into the sender's proposal and offers a bit of mystery that entices them to read on.

*David, can I have a word?* – This example works well as an email subject line. People are naturally drawn to their name, and CEOs and business decision-makers are no different. This is a subject line that won't go unnoticed.

*Are you who I should be talking to?* – This email subject line appeals to its reader's curiosity. It sparks the question, "Am I?" and leads the reader into the email ready to solve a problem.

*I can increase Lamps Inc.'s revenue by 15% in 15 minutes* – This B2B heading or subject line is based on the sales email template that got a company [16 new B2B customers](#). This example has an interesting proposal that says, "Here's what I can do for you." It's personalized with the recipient's company name, which shows that the sender took the time to research the company. It's exact and to the point, while also telling the reader that reading on won't take up much of their time.

With the right amount of mystery, precision, and personalization, your audience won't be able to help but read on.

## Pro Tip

*For emails, personalize the subject lines of valuable leads.*

*For letters, use a heading that gives your reader a preview of your proposal and tempts them to read on. Although headings are not necessary for B2B sales letters, they can be an asset if you use them well.*

### 3. Address Your Reader

When engaging with a prospective B2B client or any other kind of high-level lead, always address them by name for the most personalized experience. Remember, these sales are driven by relationships, and you want to make your reader feel important.

Depending on your intended reader's corporate position, you can address them in any of the following ways:

*Dear Taylor,*

*Dear Mr./Mrs./Ms./Dr. Taylor Smith,*

*Mr./Mrs./Ms./Dr. Smith*

Do some research on the corporate decision-maker that you are addressing to make sure you are using the correct title. This research will also help you decide how colloquial you want to be with this person.

If you aren't sure of your reader's title or name, you can address them as "Dear Sir or Madam" to be safe.

#### Pro Tip

*Sales emails tend to lean towards first name correspondence. Letters tend to lean towards a more formal greeting.*

### 4. Write the Opening Line

In our blog post about [B2C sales emails and letters](#), we referred to the opening line of a sales letter as the "hook," based on its function: to hook your reader in. B2B sales letters and emails also need a hook, or a catchy opening line.

For example, check out this powerful opening line for a B2B sales email from [Heather R. Morgan](#), founder of [SalesFolk](#):

*"I have an idea that I can explain in 10 minutes that can get [company] its next 100 best customers."*

Like the last subject line that we examined, this opening line is attractive and direct. Its offer is compelling but vague, which keeps the reader's eyes moving forward through the email and sets the reader up for follow-up contact to discuss the idea.

70% percent of business decision-makers [buy a product to solve a problem](#) while only 30% buy to gain something. Another option for hooking your prospective B2B clients is to open with the business pains they might be having (or a statistic about those business pains), and then tell them how you can solve that problem. That might look something like this:

*"Twenty-five percent of CEOs are dyslexic, but many don't want to talk about it."*

This opening line intrigues the reader with an interesting statistic, while both introducing the problem and relating to the audience.

Here are some other ideas for opening your B2B sales letter or email, aside from addressing business pains, potential gains, and using interesting statistics:

*Comment on a recent event, or your reader's recent activity ("Congratulations for\_\_!" "I saw you did \_\_," "Recently, \_\_")*

*Share a mutual connection ("\_\_recommended I that I reach out to you...")*

*Share your opinion on something relevant ("I liked the \_\_ you posted, I thought it was \_\_,")*

*Share a relevant quote or truism ("a penny saved is a penny earned...")*

## Pro Tip

*The opening line of a B2B sales emails or letters may be directly related to – or an expansion on – the subject line or heading. When hooking your B2B audience, think about what sort of opening line will be most interesting or useful to them. If you were in their shoes, what sort of hook would keep you reading?*

## 5. Write the Body Copy

In B2B sales letters and emails, the body of your correspondence should be succinct. It shouldn't be too long, or it will risk being too cumbersome for your corporate reader. However, it shouldn't be too short either, or it will risk being too vague and uninteresting.

Here are the elements that might be present in the body of a B2B sales letter or email:

### Introduce the Seller

In the body of the sales letter or email, you may briefly introduce yourself as the seller. Questions that you might want to answer include the following:

- Who are you?
- What does your business do?
- What is your mission?
- What makes you the right person/organization to deliver this service?

Remember that even when telling a little bit about who you are, you must make it relevant to the buyer. Sales letters and emails that end up being too "me, me, me," fail to persuade readers to act. What about who you are will be useful to the customer?

### Prove Your Credibility

Once your reader knows what you do, it's time to prove how well you do it. What experience do you have providing the product or service that you are offering? What previous customers can you mention to establish credibility with your buyer?

If you're new to the market, say so – you can twist novelty into something that goes in your favor. Do you offer any guarantees or trial periods you can reference so that they know it will be safe to test your product out? Does your newness make you affordable? Up-and-coming? Modern?

Remember that part of proving your credibility is showing your buyer that you've researched their company and understand their needs. Expert knowledge of your lead's business, the service you're providing, and quantifiable evidence all make for a great argument in your favor.

## Introduce Your Proposal or Offer

What are you proposing your prospective customer? What do you have to offer?

If you have a complex product and want to entice a follow-up response, you can give a general proposal, but hold the specifics on the offer. Remember that B2B sales letters and emails generally are not a “one and done” affair. Lean towards cultivating an ongoing discussion with your prospective buyer, rather than trying to fit your entire product offering into a single written exchange.

## Highlight Select Benefits

What are the benefits of your product or service? Sure, there are several, but you want to highlight the benefits that will be most relevant to your buyer and let them know specifically what these benefits can do for them.

For example, instead of saying this:

*“Our Chatbot is a new, popular, must-have feature.”*

Try something like this:

*“Our Chatbot is easy to set up and can help you lower service costs and speed up handle time.”*

By choosing the benefits that are most relevant to your reader, your prospective B2B customer will be able to more easily visualize what your product or service can actually do for their company.

## Entice Action

Every sales letter and email needs a call-to-action phrase to inspire the reader to do what the writer is asking of them. Calls-to-action must be specific and easily completed. For sales letters and emails to corporate decision-makers, the call-to-action is generally a request for a follow-up exchange or meeting.

The call-to-action in B2B correspondence must not be pushy. You must entice action without demanding it – request action without insisting. Remember that for B2B correspondence, building a relationship with your reader comes first. That way, even if your reader doesn't need your service this time, your sales letter or email might be the beginning of an effective

a long-term correspondence. Here are some ideas for common B2B call-to-action phrases:

*Call me or email me at any time and we can discuss working together.* – Asking your reader to contact you puts the ball in their court. “At any time,” shows that it will be easy for them to reach you, making attempting to contact sound you more enticing.

*I'd love to call you to review our options. When are you available this week?* – Asking your reader when they are available acts as a call-to-action and establishes the expectation of a response. Asking to be the one to make the call shows assertiveness and saying “this week” implies urgency without pushiness.

*To learn more about what our company has to offer, click here.* – In sales emails, clicking on a link is an easy form of non-committal action that can result in greater learning about your product or service. Use different media such as videos or direct your reader to an easily navigable website page to keep them interested and informed. For the best results, use this call-to-action in conjunction with inviting your reader to contact you.

The most effective calls-to-action are specific, respectful and easy for the reader to complete.

## Tips:

- *When introducing yourself to the reader, keep it to a sentence or two, max.*
- *Although your letter may be structured formally, keep the tone of your content conversational. Unless you're writing to royalty, nobody wants to read a stuffy, overly proper letter.*
- *The function of the body of the B2B sales letter or email isn't to make a lengthy case for the product – it's to establish knowledge of a product and interest in your proposal. By prompting follow-up contact, you and your B2B lead can eventually work together to decide which of your packages, products, services, and/or payment plans may be right for them.*
- *Aim for a call-to-action that is assertive, and that meets both your prospective customer's needs and your own.*

## 6. Closing Copy

Once you have finished with your body copy, wrap your B2B sales letter or email up. Make your call-to-action, thank your prospective customer for their time, add any final closing statements that might make your lead warm up to you. Here are some examples of closing statements that you could make to your B2B recipient:

*We'd love to have you onboard.* – This statement conveys enthusiasm and makes the recipient feel welcomed into a new corporate family.

*We look forward to going above and beyond for you.* – This statement shows the sender's intentions for a quality customer experience and implies a great work ethic.

*Let me know if you need more information/assistance/would like an estimate, and I'll be happy to provide it for you.* – This statement offers any additional assistance, while once again prompting the recipient to follow up.

*I am confident that our product will meet your needs.* – This statement shows understanding of the reader's needs, and a sureness that is quite convincing.

All of these closing statements show appreciation for the reader, and eagerness to begin a beautiful business relationship with them.

### Pro Tip

*Use a well-written closing statement to make your prospective B2B customer feel valued, show off your keenness to help them, and offer any last-minute assistance.*

## 7. Sign-off

Sign-off your sales letter or email respectfully. Here are some of the sign-offs you might use:

*Sincerely,*

*Respectfully,*

*My Best,*

*Best Wishes,*

*Best Regards,*

*Regards,*

*With Sincere Thanks,*

Finish with your signature, typed name, and corporate position (this adds to your credibility). If applicable, you can add a relevant postscript.

### Pro Tip

*Use a sign-off that is formal but that shows some warmth and compassion. This will help you give a respectful farewell without seeming too stiff or robotic. (According to Boomerang, response rates for emails with a slightly warmer tone were **15% higher** than those with a neutral tone... just don't go too crazy on the warmth.)*

## Conclusion

Sales letters can be a great supplement to other kinds of leads. And if written well, they can bring in thousands, millions – even billions of dollars in revenue.

We hope that you will use this step-by-step guide to write B2B sales letters and emails that will convert more leads and take your B2B sales strategy to the next level.

# Holidays, Birthdays and More – 20+ Letters to Customers for Special Occasions

There is no one right day (or way!) to send a letter to a customer. However, holidays and special occasions can be a great opportunity for your business to reach out.

Holiday letters are an excellent way to keep customers up-to-date, send out promotions, and show customers you care. And writing personalized letters to customers on their special days – such as birthdays or anniversaries – can set your company apart from the competition and help you build business relationships that could last a lifetime.

Here are 20+ letters you can use for special occasions to start up a personalized and special interaction with your customers.

## Letters for Special Occasions (Birthdays and More)

### Happy Birthday

Birthdays are one of the most popular occasions to reach out to customers. That's because birthdays are unique days that make customers feel special – it's the one time of year that is truly all about them.

Customers' birthday information is incredibly easy to collect – some customers will even [seek out companies](#) that offer birthday perks and subscribe to several marketing emails before their special day.

Companies that write birthday letters to customers commonly get a return in the form of word-of-mouth advertising and sales. Here are a few ways that you can wish your customers a happy birthday and make them feel like the center of your world.

### Happy Birthday from Your Corporate Family

To generate customer loyalty, it's important to make customers feel like they are a valued part of your organization. Here's how you might use a birthday letter or card to make your customers feel more connected to your brand:

*Dear Christopher,*

*It's time to get happy! Wishing you all the best on your birthday, and everything wonderful in the year ahead.*

*Love,*

*Your Sporting Supplies Family.*

By signing this letter off with “Your Sporting Supplies Family,” this brand manages to create a sense of warmth and relationship with the customer, showing them they care while also making them feel like a valued part of something bigger (such as a family unit).

### **On-Brand Happy Birthday**

Birthday letters don't have to be generic. On-brand birthday cards can make your customer smile, while evoking your brand's image and stimulating a desire to shop.

*Dear Maribelle,*

*We wanted to wish you the happiest of birthdays on your special day. May all your years be full of happiness, success, good health, and warm feet!*

*Love,*

*Your Friends at Socks R Us*

This company's on-brand birthday letter is charming and original, while also reminding the customer of their product.

### **Thanks for Being a Customer on Your Birthday**

Being thankful for your customer never goes out of fashion. Tell your customers how much you appreciate them in a birthday letter, and they will return the favor in the form of repeat business.

*Dear Anna,*

*Wishing a cherished client and friend a very happy birthday celebration. Our business has been on the up-and-up because of great clients like you. On your special day, we have just two strong and sincere words for you – Thank You.*

*Sincerely,*

*Tina Cohen*

### **Silly Happy Birthday to a Customer**

Happy birthday letters don't always have to be so formal, or full of accolades. Use humor in your happy birthday card to show your customers that you're not afraid to have a bit of fun with them.

*Dear Ashley,*

*Happy birthday! Wishing you another 365 days of an all-inclusive trip around the sun!*

*Yours Truly,*

*David*

Make sure that your sense of humor is enjoyable and lighthearted, so that it won't offend sensitive customers. Then send away!

### **Happy Birthday to Our Favorite Customer**

All customers are valuable to a business. Still, you can make your recipient feel special on their birthday by calling them what they are: your favorite customer!

*Dear Jim,*

*Happy birthday to our favorite client! Seriously. You're the best. And our absolute favorite. (Just don't tell Bob...)*

*Sincerely,*

*The Software Team*

As this example shows, a little bit of flattery can go a long way. Use humor to ward off customer disbelief and make this birthday letter more playful.

### **Happy Birthday with a Coupon/Freebie/Gift**

Birthday gifts, free items, and coupons are a great way to show your customer that their birthday matters to you while also creating an opportunity for them to buy. The promise of discounts and free items draws customers (and often their friends) into your business, which may not have otherwise been on their agenda. This sets them up to make additional purchases, outside of the initial incentive that was offered.

*Dear Allen,*

*Hurrah! Hooray! Happy birthday!*

*Since it's your big day, we feel like you deserve a treat. Although we couldn't send you a cake, we'd like to offer you a free ice cream sundae!*

*You can pick up your sundae at any one of our locations. Just print out this email (or show it on your phone!) to redeem it. This offer expires in one month.*

*Sincerely,*

*Dan & Jan's Ice Cream Shop*

Include freebies in your birthday letter and you may find yourself with a boost in sales – and eager subscribers. Let customers know when the offer expires, and they will approach your business more quickly.

## Letters for Non-Birthday Milestones

Depending on what service your company provides, and how close your relationship is with your customers or clients, you may be able to offer more than just birthday wishes.

Some of the other well-wishes you might want to give customers are:

- Happy Anniversary
- Congratulations on your Newborn (becoming a parent or a grandparent)
- Congratulations on Graduating
- Congratulations on your Promotion

Here are some examples of non-birthday special occasions that you can celebrate with your customer.

### **Congratulations on Graduating**

If your company works in a special event industry, consider sending customers (or prospective customers) a letter like this one on their special day:

*Dear Eva,*

*Congratulations on graduating! We are confident that today is just one of many successful moments that life has in store for you. Whatever you do,*

*never stop learning, exploring, growing and challenging yourself to be your best.*

*And we at Studio 45 are grateful to have been a part of this important day. Your graduation photos are almost done being processed, and will be available for viewing and purchase by the end of this week at this link: [LINK](#).*

*If you any questions, comments, or concerns about the images or any of the products that we offer, don't hesitate to contact us.*

*Thank you,*

*Roxane Simon*

*Studio 45 Events*

Use letters of congratulations for special occasions to commend your customers, while also giving them relevant information, if necessary.

### **Congratulations on Your Promotion**

Promotions are a great reason to send letters of congratulations to your B2B correspondents. Here is an example of how you might do that:

*Dear Harry,*

*I heard from Jeff that you were promoted to Vice President. Congratulations! As someone so dedicated and hardworking, you deserve this recognition and responsibility. And the position deserves someone as outstanding as you!*

*I wish you the best for your career and look forward to our next chat!*

*Ilana*

By keeping up with LinkedIn and staying in touch with your B2B executive contacts, you will be able to congratulate clients for personal milestones and build tighter bonds.

## **Letters for Holidays**

You may not always be aware of the special occasions that are going on in your customers' lives. And that's okay – fortunately, you can still write letters to them on holidays.

Holidays are a prime opportunity for companies to connect with their customers. Unlike

birthdays, most holidays are on set, easy-to-remember dates, and are observed by mass numbers of consumers at a time. From sales to retention to sharing corporate updates, holiday letters can fulfill a number of corporate needs. Here are some ideas of holiday letters that you can send to customers, in the order that they occur.

## Happy New Year

Happy New Year wishes often get lumped in with general holiday letters. However, they also work well as standalone correspondences. Here's an example of how you can use a Happy New Year letter to customers to keep interested parties up to date on business happenings and show them your positive intentions for the new year.

### Happy New Year Business Update

A New Year's letter to customers from a business decision maker or CEO can be a powerful way for companies to start the new year. Below is an example of how that might be done:

*Dear Rachel,*

*Happy New Year! Thank you for being such an important part of our organization in 2017. Last year we managed to introduce a brand new Chatbot into our features set. We announced a new Facebook and Twitter integration that has redefined the abilities of our Live Chat product. We introduced Audio and Video chat to help our clients deliver a more personalized customer experience.*

*And, we listened to you – our valued customer. In 2017, your feedback helped us optimize our product all around, such as by improving the interface of our Live Chat mobile apps and adding new chat buttons and invitations.*

*We are committed to continue listening, improving, and to raise the bar even higher in 2018.*

*We thank you for your loyalty, and look forward to continuing our relationship into the new year!*

*Sincerely,*

*Adam Rogers*

*CEO*

By outlining your company's past accomplishments and present goals, you can show your customers how you're growing as a company, while also keeping them in the loop.

## New Year, New Customer Service

You don't have to be a high-powered executive to write a heartfelt New Year's letter that your customers will appreciate. You can also write a meaningful letter outlining your department's objectives for the coming year:

*Dear Sophie,*

*We work hard every day to provide you with the best service possible, and we will work even harder this New Year.*

*Thanks for being such an awesome customer!*

*Yours truly,*

*William*

Setting and sharing your intention with your customers is a great way to bring them onboard with you and into the future.

## Valentine's Day

Like birthdays, Valentine's Day is another day you can tell your customers just how much they mean to you. Use these example Valentine's Day letters to sweep your customers off their feet.

### **We Love our Loyal Customers!**

Valentine's Day is about love, and what business doesn't love their customers? Here is a simple way you can tell your longtime customers that you love them:

*Dear Gabriella,*

*We love our customers, and its customers like you that make us love what we do. Thank you for being a loyal member of our cold-blooded family!*

*Wishing you the happiest of Valentine's Days,*

*Your friends at Reptiles Galore*

## Valentine's Day Wishes for a New Customer

Got some new subscribers to your email list? Here's a promotional Valentine's Day letter that you can send to new customers:

*Dear Andrew,*

*We would have sent you some chocolates and roses for Valentine's Day, but we want to take things slow (I know, we're not there yet!). Instead, here's a coupon for 20% off your next order. Maybe you can come into the store, and we can get to know each other a little better! (Then we'll see about the chocolate and roses for next year! ;))*

*Yours truly,*

*Your friends at Everything Electronics*

*St. Patrick's Day*

*St. Patrick's Day might not be the most popular day to write letters to customers, but it might be right for your brand. If so, try one of these St. Patrick's Day letter ideas:*

## St. Patrick's Day Lovin'

If you missed your chance to tell your customers that you loved them on Valentine's Day, try telling them on St. Patrick's Day!

*Dear Timothy,*

*Roses are red, shamrocks are green, you're the best customer that we've ever seen!*

*Happy St. Patrick's Day, from all of us at Paddy's Pub!*

With a creative little letter like this, your customers will walk away feeling pleasantly surprised, and appreciated.

## St. Paddy's Holiday Offer

If your customers celebrate St. Patrick's Day, then you have a good excuse to celebrate it with them. Make your customers St. Patrick's Day offers to generate sales and excitement.

*Dear Sean,*

*Happy St. Patrick's Day! A pot of gold is near, are you feeling lucky? Then come into Blue Royale today, and test your luck on the casino floor! There'll be plenty of green booze, discount appetizers, and prizes waiting for you.*

*We hope to see you there!*

*The Blue Royale Team.*

*P.S. Your first Shamrock Shot is on us!*

## Happy Halloween

Halloween is another fun and commercial holiday enjoyed by customers of all ages. Whether Halloween is an on-brand occasion for your business, or you want to stir up some sales, here's an example Halloween letter that you could write your customers:

### Halloween Greetings and Offers

You've heard it all – “spooky sales,” “scary deals.” Companies are cashing in on Halloween, and you can write a Halloween letter or email that does the same:

*Dear Albert,*

*Halloween is our time of year, right? It's like Christmas before Christmas – the time of year when you can eat candy for breakfast, lunch, and dinner, and be anything you want to be.*

*To help you truly take advantage of this time of year, we've got some scary deals going on at our store. Come in and take advantage of our last-minute discounts, and make any final additions to your Halloween party, costume, or home decorations!*

*We hope to see you around!*

*Sincerely,*

*The Holidays Plus Team*

### Halloween Jokes

Halloween is a holiday that is not short of [puns and jokes](#) (albeit, some of them terrible). Here's how you might use an on-brand Halloween joke in a letter to customers:

*Dear Janet,*

*What do you call a Halloween flower arrangement?*

*A Boo-quet!*

*Order your Halloween Boo-quet today and receive 25% our fall floral creations!*

*Sincerely,*

*Eliana's Flower Shop*

### **All Candy, All Fun**

You don't have to squeeze sales out of your customers in order to wish them a Happy Halloween. Use the following Halloween card example to send a letter to your customers just because!

*Dear Jenna,*

*We want to wish you a very Happy Halloween! May your night be full of endless candy, without the stomach ache!*

*Sincerely,*

*Your friends at Ion Enterprises*

By being thoughtful and current, you can organically bring your company into your customer's mind with a similar letter to your customer.

## Happy Thanksgiving

Show your customers that you are grateful for them using these examples of Thanksgiving letters to customers:

### **Thankful for your Business**

*Dear Chelsea,*

*We just wanted to take the time to let you know how thankful we are to have you as our client. Our success over the years has been a direct result of indispensable clients such as yourself. We couldn't have done it without you. Thank you for sticking with us through thick and thin. We hope you have a wonderful Thanksgiving!*

*Enjoy your turkey,*

*Emily Johnston*

## Thankful for your Help

Nonprofits and other organizations that accept donations may thank customers for something a little different come Thanksgiving. See how the following Thanksgiving letter to customers applies to non-profit organizations:

*Dear Matthew,*

*This Thanksgiving, we are grateful for the donations that we have collected during our seasonal food drive. Thanks to our donors and the hard work of our volunteers, 100 families in need will be able to have a Thanksgiving meal this coming Thursday.*

*One step at a time, we can make a difference. Thank you for being a part of this movement to end hunger. Happy Thanksgiving to you and your families.*

*Sincerely, Hunger Abolition Co.*

This letter format can be tweaked to accommodate any nonprofit, for any holiday.

## Merry Christmas

Christmas cards are a great way to spread holiday cheer to your customers, even if you don't have a bag of gifts for them. Use these Christmas letters to customers to show them that even during the busiest time of year, they are still on your mind.

### You Make Each Christmas the Best Christmas

Has a customer been with you through many a Christmas? This may be the Christmas letter for them:

*Dear Alexander,*

*Because of you, every Christmas at Hannah's Closet is nicer than the last. You help make us a better company. Merry Christmas to you and yours.*

*Sincerely,*

*Hannah and Co.*

### Warm Christmas Wishes

Veer your yuletide hopes away from your company, and into the customer's home with warm Christmas wishes:

*Dear Caiden,*

*We at Tools Depot wish you a very Merry Christmas! We hope your holidays are as wonderful as you are, and that you find your home full of love, warmth and laughter.*

*Sincerely,*

*Tom*

If you were to write a family member a Merry Christmas letter, how would you do it? What can you take from that to give your customers genuine season's greetings?

## Happy Holidays (General)

Chances are, not all of your customers will celebrate Christmas. Use the following example letters to customers to help you write your own all-inclusive holiday wishes.

### **B2B Holiday Thanks (and Well-Wishes)**

*Dear Chase,*

*Thank you for loyalty and goodwill throughout the past year. We wish you the happiest of holiday seasons, and we look forward to our meetings next year.*

*Sincerely,*

*Richard*

### **Funny/On-Brand Holiday Wishes**

*Dear Ingrid,*

*We hope this holiday season finds you on a remote island, sipping coconut water and taking shots off a hot yoga teacher named José. And if it doesn't, we hope it at least finds you at home with your family, surrounded by love, happiness, and comfort. Hey, there's always next year to make those travel plans, right?*

*Love,*

*Your Friends at Destination: Anywhere*

Holiday letters can be serious or lighthearted: what matters is that they celebrate the season – and the customer.

## Miscellaneous Holidays and Days of Recognition

Is there a niche holiday that isn't widely celebrated, but that might be relevant to your brand? Writing a holiday letter for a miscellaneous, less well-known holiday or national day may teach your customers something unexpected, and make your company stand out. After all, how hard do you have to fight for your reader's attention on [International Axe Throwing Day](#)?

Here are some examples of offbeat holidays that your company could write to customers on, should they suit your brand:

- National Cheese Lover's Day – January 20th
- National Pizza Day – February 9th
- World Sleep Day – March 16th
- Doctor's Day – March 30th
- Bicycle Day – April 19th
- New Homeowners Day – May 1st
- Programmer's Day – September 13th
- World Kindness Day – November 13th
- National Cookie Day – December 4th

Are you a company that sells artisanal cheeses? Write to your customers on National Cheese Lover's Day! Are you a non-profit that works to eliminate bullying from schools? Write to your donors on World Kindness Day. To find a miscellaneous holiday that resonates with your company, do a quick [internet search](#) and see what comes up.

## Conclusion

Some days may be better (strategically speaking) than others to write to your customers. But in the end, if you write with compassion and demonstrate an investment in your customers, then they will respond positively to the gesture.

Any of these example letters can be modified to fit any brand, any holiday, and any client.

We hope that we have given you some inspiration on how to write the perfect letter to customers, regardless of what day it is.

# 101 Ready-to-use Live Chat Scripts

There are countless different conversations that your agents may have with your customers. Every day your agent will probably face a different issue or query that they have to figure out on their feet and how best to resolve.

However, the nature of their role will also mean that there will be many conversations and scenarios that they will face again and again, day in, day out. Making sure they can provide the perfect answers to these, and quickly, is crucial.

Luckily for you, we've created 101 ready-to-use scripts for the 8 most common live chat scenarios. Train your live chat team to use these scripts and they'll be well on their way to providing a more consistent, professional and efficient service than you could have imagined.

## Greetings

How you say hello makes a world of difference. Starting on the right foot with a customer sets the stage for a positive chat, while a curt or unenthusiastic greeting can put a client on edge. We all know the power of a great first impression, so use the scripts below to treat each new chat greeting like a real-life introduction.

## General greeting

Hello! Welcome to **\*businesses name\***, and thank you for visiting our site.  
How can we help you today?

Hello, and thank you for using **\*businesses name\***'s live chat service.  
Is there something in particular we can help you with?

Good morning/afternoon/evening, and thank you for contacting our chat line.  
How are you doing today? May I ask why you contacted our chat service today?

Good afternoon! How may we assist you today?

## Greeting for repeat visitors

Hello again **\*name\***! Welcome back to our site. What can we do for you today?

Welcome back **\*name\***! It's great to see you again.  
Did you want to pick up where you left off?

Hello, and welcome back to **\*business name\***'s site.  
Were you having more problems with **\*previous issue\***?

## Explanation that chat may be monitored or recorded

I wanted to mention that this chat may be reviewed for quality assurance.

We want to let you know that this chat may be reviewed and used for training purposes.

I wanted to let you know that this chat will be reviewed for quality assurance purposes and for further follow-up if needed.

# Apologizing or Unable to Meet Request

It can be hard to say no. After all, your job is to help a customer and to be as positive as you can be, right? Unfortunately, there are times when a customer's request simply not addressable.

If trying to figure out the right words to deny a customer's request has you scratching your head, here's a little known secret: don't use the word "no." It may sound tricky, but we've provided you with quality alternatives to soften the blow.

## Apologizing for an issue

I understand how you feel, I'm very sorry.  
We're going to take care of this for you right now.

I'm deeply sorry about **\*Issue\***. Let me speak with my supervisor to see how we can correct this for you.

I'm sorry that **\*product or service\*** is not what you expected.  
I want to talk with my supervisor to see what we can do.

## Unable to meet request

I apologize, but at this time we're unable to meet that request.

I'm very sorry, but fulfilling that request isn't possible at this time.  
Let me check and see what else I can do for you.

I'm really sorry but what you're asking is beyond the scope of what we can do. Here's what I CAN do:

## Offering to provide a solution

May I suggest **\*solution\*** as an alternative?

To best meet your needs, I would recommend the following...

I feel that the best way to solve your issue would be **\*solution\***

## Offering an escalation path

I understand how you feel—would you like to speak with a supervisor who would be able to better meet your needs?

I would need to get approval from my manager for that request... may I transfer you?

Would you like me to refer you to my supervisor?

I may need to check with my manager to accommodate that request.

We're sorry, but an issue like that can only be handled in person at one of our locations. The nearest store to you is **\*location\***

# Transfer

Things can get messy when you don't have the information a customer needs on hand. Getting a customer to the right representative is crucial, but so is getting them there without any hiccups. Use the following transitions to smoothly transfer a customer to the appropriate team member.

## Suggesting transfer

I'm sorry for the confusion, but this department doesn't have information on that topic. Would it be alright if I transferred you to the correct department?

I apologize for the miscommunication, but this department isn't equipped to handle that kind of inquiry. Would it be alright if I transferred you to the correct department?

Based on the information you've provided, I believe **\*agent name\*** will be able to best meet your needs. Is it okay with you if I transfer you to **\*agent name\***?

Unfortunately, I'm afraid I don't have the ability to accommodate your request. However, **\*agent name\*** specializes in this type of situation and would be happy to speak with you. Is it okay with you if I transfer you to **\*agent name\***?

## Transferring

Please hold on for one moment while I connect you with the right person.

I'm transferring you right now; we'll be with you in just a moment!

I apologize, but **\*agent name\*** is the one who will be able to best handle your issue. Please hold for a moment while I contact him/her.

## Customer requesting to speak with another agent

Yes, **\*agent name\*** is available if you would prefer to speak with them.

Of course, I can transfer you to **\*agent name\*** if you would prefer.

I'm sorry, but **\*agent name\*** is currently unavailable.  
Would you like to leave him/her a message?

## Putting Customer on Hold

Nobody likes being on hold, period. But as a customer support agent, you know that there are times when this is unavoidable, and making someone wait is crucial to delivering a quality solution.

Handle your customer respectfully and reassure them that they won't be abandoned, and you'll earn their respect.

### In the middle of chatting

Is it okay for me to put you on hold for just a moment?

It may take us a moment to review that information—may we put you on hold?

If you're comfortable holding for just a moment, we'll review your information and have an answer for you shortly.

### In the queue

We apologize, but all of our agents are currently assisting other customers.  
Please hold for the next available agent.

We're sorry, but all of our agents are chatting with other customers at the moment.  
If you can hold for a couple minutes, we'll respond as soon as we're able.

There are currently **\*estimate\*** customers ahead of you in line. Please hold for the next available agent.

We expect that an agent will be available to help you shortly, there are currently **\*estimate\*** customers in line.

An agent should be free to assist you very shortly. (your place in the queue: **\*estimate\***)

## Thanks for waiting

Thank you very much for holding, and sorry about that wait!

Thanks for holding! We do apologize about that wait, but we're ready to assist you.

We thank you for holding and apologize for the wait.

## Asking for Additional Information

The key to asking for personal information is to establish trust. Handle your information requests professionally with the following scripts, and customers will know they're in good hands.

### Asking for general information

If it's okay with you, we'll need to collect a little bit of additional information before we proceed.

To meet your needs, we'll need to verify some of your information.

May I ask for more information before we continue?

## Asking for credit card/billing information

To process your order, I'll need your full 16-digit credit card number, expiration date, and security code.

May I have your current billing address?

To place your order, I'll need a credit card.

**Note:** Your live chat system must be PCI DSS compliant in order to share credit card information. If it isn't, you should not accept credit card details via chat.

## Asking for verification of address/location

Before we proceed, may I ask you to verify your current home/billing address?

What is the listed zip code of your current account?

For security purposes I need to verify your identity before we continue. What is the phone number attached to your account?

## Asking for account number/date of birth/last four of SSN

May I have the account number listed on your bill?

If you give me your account number, I can look up your information.

If you would verify your date of birth for me, we can begin looking at your account information.

I'll need either your date of birth or the last four digits of your social security number to proceed.

## Requesting Screen Sharing

Sometimes requesting a screen share is the best way to assist a customer. Unfortunately, it's similar to stepping inside someone's living room—a customer's web browser is a private space that may not be ready for visitors. But like a plumber or electrician, you need access to a client's personal space in order to fix his problem. Be patient with customers, and use the following scripts to earn their trust.

We may need to use screen sharing to diagnose your issue. Is it okay for us to remotely access your browser?

We're having a little trouble diagnosing your issue based on the information provided—would you be willing to let me see your screen to figure out what's going on?

I need some additional information to solve this issue. It would be a great help if you could share your screen with me. Is that okay?

## Proactive Sales Chat

Reaching out to a customer proactively is a waste if you don't have the right words. Like a sales associate in a department store, you want to strike a balance between helpfulness and respect. Whether you're offering general assistance or pointing them in the direction of specific sales, you want to bring the most value to the forefront of your service. Try the following lines when helping visitors down the road to becoming loyal customers down the road.

### Reviewing options

I understand, so many options can be confusing. May I provide assistance in helping you decide?

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

If you'd like to wait, we can save your information and give you some time to think about it.

Excellent choice! We're confident that you'll be satisfied.

Very good choice. We're confident that you'll be happy with that option.

## Recognizing when a customer needs help

It looks like you're visiting quite a few pages!  
Can we help you find anything?

It's been a while since you've contacted us!  
Feel free to let us know if you need any help.

It's been a while since you've reviewed your shopping cart—  
are you ready to check-out, or can we help you find something else?

## Unresponsive customer

Hello! It looks like you've been inactive for a while. Can we help you find something?

Hey there! It seems like you've been inactive for a few minutes.  
Did you need help navigating our site?

It appears that you've been inactive for a few minutes.  
Please feel free to use our live chat service if you have any questions.

## Communicating sales and promotions

Hello! Before you begin shopping, we wanted to let you know that **\*promotion\*** is currently going on through the end of the month.

Hello! Right now we're offering a discount on **\*promotion\*** if you're interested in taking advantage of that deal.

Before you check-out, you should know that we're currently offering **\*promotion\***. Would you like to take advantage of this limited-time offer?

Hey, we just wanted to let you know that **\*promotion\*** is on sale right now, if you felt like saving a few dollars today.

We do apologize, but the time limit on that promotion has expired. The deals we're currently offering include **\*promotion\***.

We're sorry, but that deal is no longer available. If you'd like, I can list the other specials we currently have available.

## Recommending items frequently purchased together

It looks like you're purchasing **\*product\***! Could we interest you in **\*product\*** as well? They complement each other nicely.

Since you're purchasing **\*product\***, we'd recommend **\*product\*** as well. Customers in the past have found that purchasing these items together made their lives easier.

## Purchasing and Shipping Options

Are you done shopping? The current total of the items in your cart is **\*total\***.

As of right now, your current balance is **\*total\***.

Good news! Since your order is over **\*amount\***, you qualify for free shipping.

Good news! Your order is over **\*amount\***, meaning that you qualify for our special **\*discount\*** off of your order.

If you'd like to hear about all of your shipping options, we can list them for you.

We offer several options for shipping including USPS, FedEx, and others.

Based on our estimate, you should receive your order on **\*estimate\***

While we can't offer an exact date, we expect your order will arrive on **\*estimate\***

Our shipped items usually take **\*estimate\*** to be received.

## Goodbye

Similar to how you say hello, saying goodbye is incredibly important. Fantastic service can be completely upended if a customer walks away with a negative last impression. You want your customer to log off not only satisfied with their service, but with a positive impression of your business and service. Wind down the conversation with these scripts ideas.

## Thanking customers

Thank you for using our live chat service, and we hope to hear from you again! Goodbye!

Thanks for using our 24-hour help service, and please feel free to contact us again if you need any further assistance. Goodbye!

Thank you for using our live chat service. I am now closing this chat. If you have any more issues, please don't hesitate to let us know. Have a great day!

Thank you for visiting! We hope to see you again!

Thanks for stopping by, we hope to hear from you again!

We appreciate your business and hope to hear from you soon!

## Visitors are unresponsive

It's been a while since your last response. Would you like to continue chatting?

Hello **\*name\***, are you still there?

Hello, it seems that you're no longer responding. I will have to close the chat for now. If you still need my help, you can request a chat again. Thanks for stopping by.

## Providing alternative contact options for future inquiries

If you have any further issues and would like to contact us directly, you can reach us at **\*email address\***

If any more problems arise and you can't access our chat line, please feel free to email us at **\*email address\*** or call our customer service line at **\*phone number\***.

If you'd prefer, you can reach our customer service through **\*Facebook/Twitter/Social media\*** or via SMS text message at **\*phone number\***.

# 4

## Track and Measure Your Live Chat Team

Key performance indicators (KPIs) are measurements that show how effectively a company is achieving its goals. KPIs can be used to measure the success of a company's customer service strategy, the quality and effectiveness of its support, how well its agents are performing, and more.

Measuring KPIs is like taking your car to the mechanic. Sometimes you do it to diagnose a specific problem, while other times you do it to make sure that everything is running smoothly and see what could be improved. As a manager, it is your responsibility to assess your company's KPIs and use your findings to make any appropriate adjustments to your live chat team. But with so many performance indicators to consider, how do you know where to begin?

You will learn:

- Which must-watch KPIs will be most useful to the ongoing development and improvement of your live chat team
- How to incorporate them into an ongoing performance plan that will ensure the optimization of your live chat experience.

# The 9 KPIs You Need to Track

## 1. Number of chats

Here's some good news: calculating the number of chats that your department has received is straight forward, and it can tell you a lot. You can analyze this metric by viewing your chat volume report.

Here are some things to look for when studying this metric:

- **How many chats are agents accepting as opposed to rejecting or passing to other agents?** Consider what the numbers reveal about agent work ethic, confidence, and performance.
- **Is your live chat count lower or higher than what your company is aiming for?** Ask yourself what changes could be made to your live chat experience to make your numbers go up or down. Consider how the visibility and placement of the live chat button may impact how many chats your company is receiving. If you want more customer engagement, make sure your website, email signatures, and other key contact points tell customers that they can live chat with you. You may also consider switching to a proactive live chat strategy.
- **What is your number of missed chats?** This number can show you whether your department is adequately staffed during peak busy times. If not, consider taking on more agents, seasonal hires, or just shifting the schedule to have more agents available when chat requests are highest. A high number of missed chats may also indicate that you need to check your average handle time (more on this metric later) to make sure that your agents aren't spending too much or too little time on each chat.
- **What is your number of offline chats?** If there are any times where you are receiving a lot of offline messages or chat requests, meaning when a customer reaches out on live chat, but no agents are there to answer it, consider adding to or shifting your operating hours to accommodate this. You can also consider adding a chatbot to answer FAQs 24/7 when your agents have clocked out or are taking a statutory holiday.

## 2. Agent Utilization Rate

The best measure of how work time is being used is agent utilization rate. This key performance indicator reveals the percentage of time that agents are spending in live chats, wrap-up, and other productive functions, as opposed to in “away” mode or offline.

Agent utilization rate can be measured as follows:

$$\frac{\text{Amount of live chats per month} \times \text{Average Handle Time}}{\text{Hours worked in a month} \times 60\text{mins}}$$

Typically, a 50% to 60% benchmark is good to aim for. A utilization rate that is too low might be indicative of problems like overstaffing and poor agent training. Similarly, a utilization rate that is too high may result in rushed chats, mistakes in documentation during wrap-up, negative customer feedback, and agents who are stressed out.

Consider investigating the following when studying this metric:

- **Does your agents’ log-in time correspond with the number of hours they have worked?** By checking your agents’ log-in times, you can ensure that your agents are logged in and available when their schedules say that they’re supposed to be. Noting any divergences can also be telling of agents’ work ethic (such as when an agent clocks in but waits to log into the system). It can also help you to understand if schedules need to be rearranged, for example if an agent always logs in a few minutes late because they struggle to get in on time from class.
- **How much time are your agents spending in “away” mode?** The percentage of time that your agents are making themselves unavailable can speak for their work ethic, as well as indicate a lack of team morale.
- **How many chats are your agents handling at once?** Check how many chats your agents are handling simultaneously for an indication of their work ethic, as well as gaps in training – agents handling a lower number of chats may need more training. However, be sure to also check the quality of these conversations – quantity must always be balanced with quality.

### 3. Wait Time

Wait time has a huge impact on customer satisfaction. How long visitors are waiting in the queue is an important metric that is available to managers in the wait time report. The wait time report shows details on visitors' average and longest wait times within a specific time range. Another valuable report, the queue report, shows the number of visitors who waited in the queue, abandoned the queue, switched to message, or were refused by agents within a specific time range.

You can compare data from the wait time and queue reports to see how wait time affects visitors' actions when they are waiting in the queue. If the wait is long and abandonment is high, this can be a sign that you need to take on more agents or increase the maximum chat allowance per agent. If the wait time and/or abandonment rate is high during specific times of the day, consider having more agents work during the busiest hours. If the queue time fluctuates heavily with the seasons, consider taking on seasonal agents to help you tackle the holiday website traffic.

### 4. Average Handle Time

Average handle time, or AHT, is a classic measure for evaluating agent performance and refers to how long each agent spends on a chat on average. By measuring your agents' average handle time, you can help enforce a speedy, concise resolution of customers' issues.

The average handle time can be measured as follows:

$$\text{AHT} = \frac{\text{Total chat time} + \text{total wrap-up time}}{\text{number of live chats handled}}$$

In order to balance customer satisfaction and a speedy resolution, you may want to try aiming for an average handle time of 14 or 15 minutes. Keep in mind however, that average handle time varies greatly by industry and by types of queries handled. We have seen some companies work with an ideal AHT of as low as 4 minutes, and others who aim for 20! You can check this metric in the agent efficiency and the agent performance reports in your customer engagement platform.

A low average handle time might indicate that an agent has the skill, efficiency, and knowledge needed to help his or her customers fast. At the same time, it might also indicate that an agent is rushing through chats and is not fully solving the customers' issues. Meanwhile, a high average handle time might indicate that an agent needs additional training to be able to solve issues more effectively. On the other hand, it might show they are dedicated to solving these issues the first time, even if it takes a little longer.

Here are some additional things to consider when measuring your average handle time:

- **Are you putting speed first?** Speed isn't everything. If your live chat agents are rushing through live chat conversations simply to get customers in and out, then they may not be providing a good customer experience. While this metric has its uses, it is important to never drive agents to value speed over issue resolution.
- **Are your agents' chats simple or complicated?** Average handle time metric doesn't differentiate between complex, involved cases, and simple ones. This means that it is important for you to use this metric in conjunction with an investigation into live chat transcripts, or other metrics that measure the quality of an agent's live chat abilities.
- **Are your agents taking advantage of all the live chat tools that are available to them?** Agents' average handle time can often be reduced by using the live chat tools, such as shortcuts, canned messages and intelligent assistance to help save time in each chat.

## 5. First Contact Resolution

First contact resolution, or FCR, indicates whether a customer's issue has been resolved during their first contact with your company – in this case, within a single live chat session.

Increasingly, FCR is being recognized as one of the most (if not the most) important metrics to watch in customer service. Customer satisfaction ratings have been shown to be [35-45% lower](#) when a second call must be made for the same issue. As well as directly improving customer satisfaction, prioritizing FCR can also help reduce queue wait times as customers won't have to come back for help again.

First contact resolution can be tricky to calculate. If the issue is resolved as a transfer, does it still count as first contact resolution? The consensus is generally no. What if an agent marks a customer issue as resolved the first time, but the customer disagrees? Again, typically no. One way you can measure FCR effectively is to ask customers in the post-chat survey if their issue was resolved the first time.

## 6. Invitation Acceptance Rate

If your company uses a proactive live chat strategy, then the invitation acceptance rate metric will show you how well that strategy is working. You can measure this with two different reports in Comm100's agent console:

**Auto-invitation report:** this reveals the number of invitations triggered to be sent automatically by predefined rules as well as the rate at which customers accept these invitations within a certain time period.

**Manual invitation report:** this reveals the number of invitations sent manually by agents as well as the rate at which customers accept these invitations for any given time period.

If your customers aren't responding to your automated or manual chat invitations, this may indicate several factors. Consider the messaging of your greeting, the design, and its visibility. Also think about the audience you are targeting and the pages your live chat sits on. Consider where the customer likely is in their customer journey when visiting a particular web page and tailor the outreach message accordingly. Some pages are better left with no proactive outreach at all, while others can drastically improve conversions and reduce customer confusion.

## 7. Sales Conversion Rates

Are you using live chat as a [lead generation tool](#)? If so, it's good to be able to track whether your company and agents' efforts are working. This number is very much influenced by your automated and manual invitation acceptance rates.

Every company's sales conversion rate goal is going to be different, depending on the intensity of their proactive chat strategy. A low sales conversion rate could mean that agents need additional training in good sales and upselling practices. It could also reveal a need to revise and rework your automated and manual proactive chat invitation strategy for maximized sales capacity. If selling and upselling isn't your agents' strong suits, consider setting up routing rules so that your live chat team or the customer engagement platform itself can identify prospects versus customers and route prospects to your sales team instead.

## 8. Visitor Logs and Wrap-Up Notes

Visitor logs and wrap-up notes are important for categorizing your chats, and for adding any important details to customers' cases. Agents whose visitor logs and/or wrap-up notes are left incomplete, mismarked, or excluded could cause problems in the future with customers who need to make a repeat contact. You can analyze this information with the wrap-up report.

Consider the following when studying visitor logs and wrap-up notes:

- **Are your agents adding the appropriate notes and wrap-up to the chats?** Perform an audit to ensure that your agents are marking their live chat messages appropriately, and not marking a junk message as an inquiry just to leave it open for 15 minutes and appear busier than they are.
- **Are your agents remembering to wrap-up every time?** Wrap-up notes help you better categorize and manage your company's live chats. This information makes it easier for you to identify any repeat issues or frequent problems with products or processes, so make sure your agents always wrap-up a chat.
- **What can you learn from your wrap-up composition?** What is your percentage of complaints as opposed to inquiries or suggestions? This information can help you see what area needs the most improvement.

## 9. Customer Satisfaction Scores

Customer satisfaction (CSAT) is a metric that is vital to determining the success of your live chat team and the quality of company procedures, policies, and products.

Customer satisfaction can be measured in several ways. Some options include the following:

- **Net promoter score** is an index that measures a customer's willingness to recommend the company's products and services to others.
- **Customer effort score** is a score built by a single-question survey that asks if the company made it easy for the customer to handle his or her issue.
- **Loyalty measurements** examine whether customers have remained loyal to your brand or are starting to shop with the competition.
- **Customer satisfaction surveys** are surveys about the customer experience which can be delivered through post-chat pop-ups, emails, customer interviews, focus groups, and more.

One of the most comprehensive of these measures is the post-chat customer satisfaction survey. By having your agents encourage customers to take the customer satisfaction survey, you will receive a more consistent, accurate spectrum of feedback. This is because if your agents do not encourage customers to take the survey, it is possible that only customers who had an especially great experience or an especially awful experience will fill it out. This results in data that is not quite reflective of the customer service experience as a whole.

You can access the customer satisfaction survey results under the post-chat survey report in your customer engagement platform. To ensure that you maximize the number of customers who are taking your post-chat survey, try keeping the survey short and sweet. If you aren't receiving enough customer feedback, [click here to learn more about how agents can promote the customer satisfaction survey](#).



## Live Chat Benchmark Report 2020

This report analyzes over 56 million chats from 2019 across 14 industries around the globe featuring:

- Data-informed, strategy-boosting insights and year over year comparisons of the latest customer experience trends
- Best practices from top performers and influencers for creating a successful live chat strategy
- How AI-powered chatbots fit into the picture and will continue to influence customer interactions

[Learn more](#)

# How To Use Your KPIs As Part of an Ongoing Performance Plan

Before you begin analyzing your KPIs, be mindful that not all of them should be given equal emphasis. Instead, think about what customer service values are most significant to your company and how to go about attaining them. This way you can establish which metrics should be emphasized as your top priorities.

## Establish Benchmarks

If you already have at least a month's worth of data from your customer engagement platform, you likely have enough data to establish what your current averages are for each of the metrics mentioned above. If you don't have any data and are starting from scratch, this Live Chat Benchmark Report can help get you started. It spans 14 different industries around the world.

Now that you have benchmarks, do a pulse check. Based on all your auditing and reviewing, do these seem too high or too low? This can help you set your team's goals to align with your corporate KPIs.

## Set Clear Expectations

In order for your KPIs to work as they should, your agents must first know what is expected of them. Make sure that the information and benchmarks that you give your agents for each measure are as clear and specific as they can be. For example, instead of telling agents to keep their average handle time "low," tell them to keep it under fifteen minutes or less (or whatever number is your company's standard).

You also need to make sure that you are setting expectations that aren't in direct opposition to one other. For example, telling agents to prioritize both quality and speed might make striking a balance tricky for them. It can even result in role ambiguity which can be stress-inducing and detrimental to staff.

## Assess KPIs Throughout the Review Cycle, Not Just at the End

To truly meet your goals, it's important that you assess your KPIs throughout the review cycle, and not just at the end of the quarter or year. This is because sometimes your agents are not thinking about what metrics they are hitting or missing - they're just thinking about getting through the day.

Checking your KPIs periodically will help you know which areas your agents need to work on. With this knowledge, you will be able to remind your team of the goal as appropriate.

## Catch Performance Slips Right Away

By reviewing your KPIs, you will be able to detect and correct performance slips right away. You can best catch performance slips by using the live chat reports and tools that are available for management.

One key auditing feature that managers have access to is live chat transcripts. By appearing offline and reading agent transcripts live (or right after they happen), you can track metrics such as first contact resolution rate, customer satisfaction rate, and whether average handle time is being achieved at a running pace or with quality assurance in mind.

By being attentive, you can notice any slips in the quality of agent performance and address them right away, so that customers are not affected in the future. This also helps agents learn and grow by avoiding bad behavior.

## Set Goals Going Forward

Moving forward, it is important to set goals according to your KPI findings. Consider the following questions when deciding on your next steps:

- What metrics do you want to improve by your next review cycle?
- What changes need to be made to improve any of these metrics?
- Is any additional training required? If so, what sort of training, and for which agents?
- How can you get all of your agents on board?

## The Proof is in the Pudding

By keeping track of your must-watch key performance indicators and adjusting accordingly, you will be able to provide a live chat experience that is easier, faster, and more satisfying for your customers and more profitable for your business.

# 5

## Take Your Team to the Next Level

You've hired the ultimate team of live chat agents, undergone a thorough onboarding, trained them up to superstar perfection, and are now tracking individual and team KPIs to ensure your team is running like a well-oiled machine.

This is a huge achievement and has likely taken a lot of hard work and patience, so congratulations!

Now you have two options: you could sit back and leave your team running as it is, hoping that you are providing your customers (and agents) with the best possible experience, or you could set up an omnichannel customer engagement platform and take your customer service practice to the next level, providing support that your competitors could only dream of. What would you choose?

If you want the latter, then read this section to find out how your agents can use Comm100's omnichannel customer engagement platform to provide an optimal experience for every customer while improving agent efficiency and support.

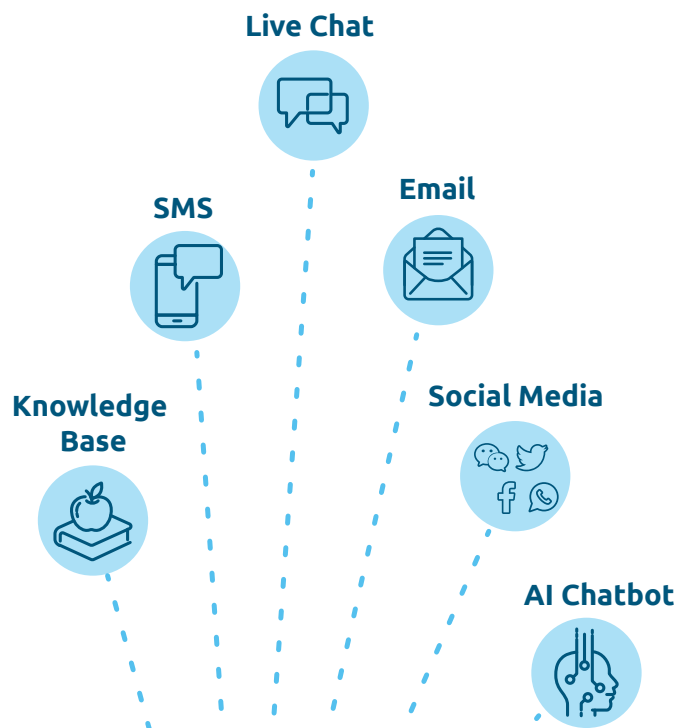
# How To Deliver Better Service With Omnichannel Customer Engagement

## 1. Offer an Omnichannel Experience

Up until now, we have largely spoken about utilizing live chat on your website. This is the first step to providing digital customer service that today's 21st century consumers expect (and demand!). However, even the best live chat technology and team isn't enough. You need to offer support to your customers on every channel they want – whether this be live chat, social media, email or even SMS. And crucially for your customers and agents alike, this communication has to be connected.

Imagine a customer sends you a question via email, but then decides they need an answer more quickly, so they message you on live chat. If these channels aren't connected, your agent won't know what their question was on email and will have to ask the customer to repeat themselves, performing one of the greatest customer service cardinal sins. [According to research by UBM](#), repeating a query to agents is the biggest bugbear, with 75% of customers citing it as the worst customer service event.

Now let's imagine that these channels are connected. When the live chat message comes in from the customer, your agent is immediately able to read the previous email query they sent (as well as all other previous interactions) within one unified display. As a result, they can immediately understand what the customer's issue is and won't need to ask the customer to repeat themselves – improving the customer experience and saving agent time too.

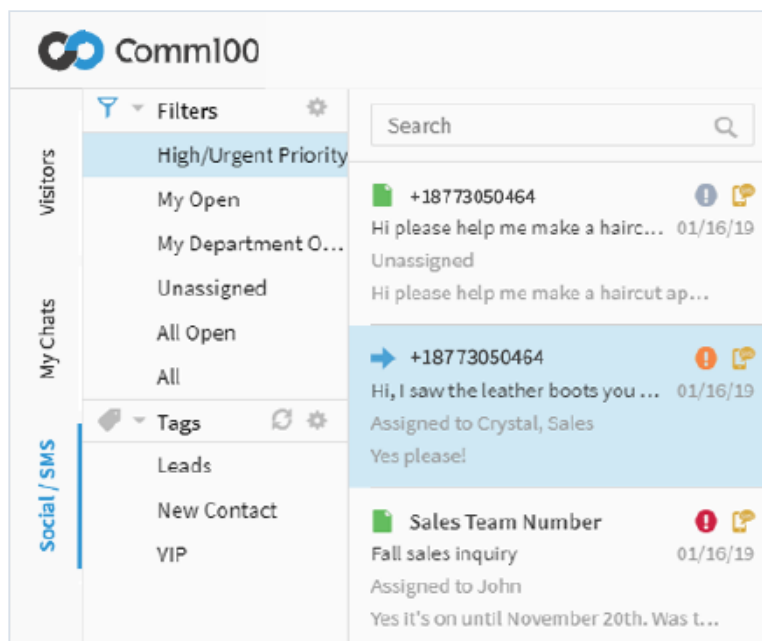


Often an agent won't be able to provide a resolution immediately. In fact at best, **22% of the time** the issue won't be resolved on first contact (FCR). Because of this, it's crucial that your agents can track support tickets from first contact through to resolution – whether originating as an email or a chat — with detailed notes covering every step along the way. A unified customer engagement platform that connects all customer conversations into one agent console achieves just this, allowing your agents to provide a cohesive, streamlined and personalized experience for every customer.

The same applies to social media. Whether reaching out to you on Twitter, Facebook, or WeChat, customer messages are consolidated into one display, including direct and public inquiries so no message (good or bad!) goes amiss. Say goodbye to your social media coordinators guessing responses to tweets, or haphazardly forwarding queries onto the CS team hoping for a quick answer they can copy and paste in response.

Comm100's omnichannel platform can even integrate SMS communications. SMS is the most popular digital communication method, but for it to be used effectively, it must be connected with your other communication channels, and not stuck in a silo. Comm100's SMS integration allows agents to respond to SMS within the same display as for live chat, ticketing, and email.

SMS customer communication can be used in a huge variety of circumstances – sending appointment confirmations, delivery notifications, or even offering SMS as a faster alternative when the phone queue is getting long.



Comm100 integrates SMS, social, and other digital channels to be managed and prioritized from one console.

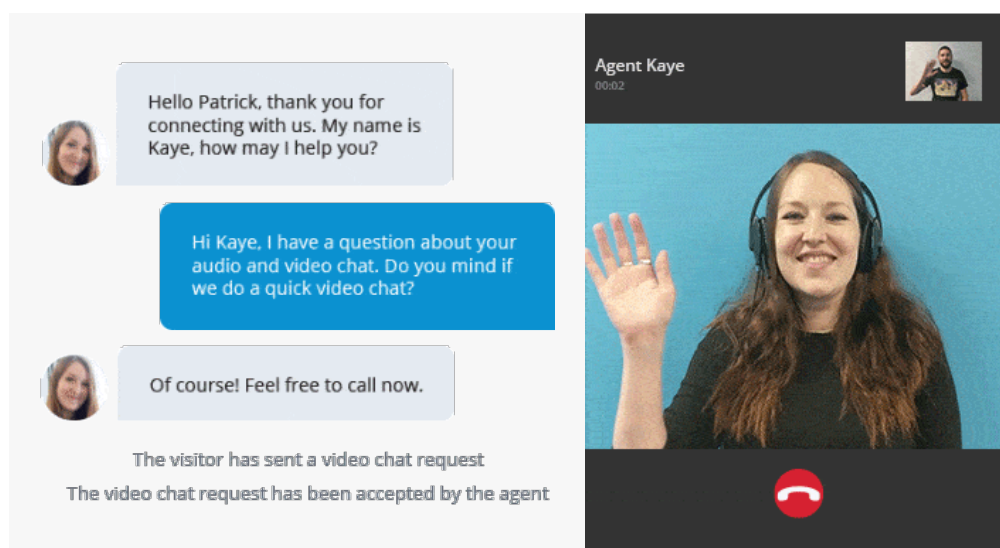
## 2. Personalize the conversation

While written messages will often be enough to resolve a query, sometimes the issue is more complex or the customer needs more help.

When this happens, you need a live chat solution that allows your agents to offer an alternative way of communicating. With Comm100 Live Chat, your agents can suggest audio and video chat, helping to deliver a more personalized chat experience, decrease handle times and establish closer, more personal relationships with customers. Audio and video chat are browser-based within the chat window. This means the customer doesn't have to move onto a different page and you don't need additional downloads or plugins, ensuring a seamless experience for everyone.

Your agents can also offer co-browsing to allow the agent to instantly view and interact with a visitor's web browser through a single click. This way, your agent can easily understand where your visitors are having trouble, and personally guide them through complex processes, decreasing time spent on resolving more difficult issues. The agent can even request to control the visitor's keyboard and mouse through remote control. This helps agents tackle complex troubleshooting steps without needing to ask visitors to do the work themselves, increasing satisfaction and decreasing time to resolution.

Comm100 Live Chat also allows you to easily exchange files with visitors during a chat, including documents, PDFs, spreadsheets, and images. This can help improve chat efficiency, and because it can all be performed within the chat window, it also increases First Case Resolution (FCR) as you don't need to divert the conversation onto email.



Audio and video chat is made easy using Comm100 to provide a personalized experience and often faster resolution.

### 3. Sophisticated routing

In most organizations, certain agents are more qualified to answer a question than others. So why not make sure that these agents always receive these questions and provide the customer with the most accurate answer straight-away?

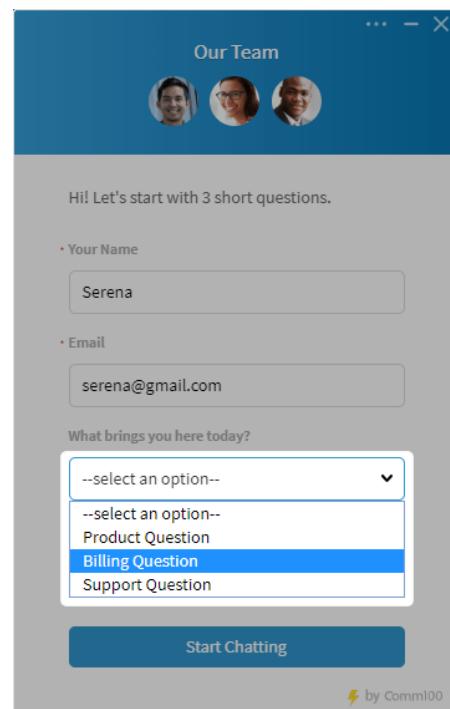
With Comm100's intelligent routing capabilities, you can do just this. When a query comes in (through live chat, email or social media), you can efficiently route it (manually or automatically) to specific agents or departments based on a number of variables - customer location, source, behavior, navigation history and other system fields.

You can even set up your pre-chat survey to allow visitors to select the department they wish to chat with for a solution, allowing for faster routing and better customer service. Here are some typical chat routing scenarios:

- Customers from different geographic regions should be served by the resellers, partners or teams responsible for those regions.
- VIPs may be served by a senior team while non-VIPs may be handled by lower level teams.
- Customers are assigned to dedicated account managers and are served by those account managers who know them well and can provide a more personalized service.

Not all your agents will be equal – some of your more weathered agents will be able to handle more chats simultaneously than your new recruits. This isn't a problem – simply select the maximum number of chats each agent can handle at one time and live chats will come in according to these criteria.

When visitors get quality, detailed answers on their first try, it builds long-term brand loyalty amongst customers. This provides big benefits for your business in agency efficiency, increased top-line revenue, and customer retention.



Use dropdown fields in the chat form to automatically route the visitor to the correct agent using Comm100.

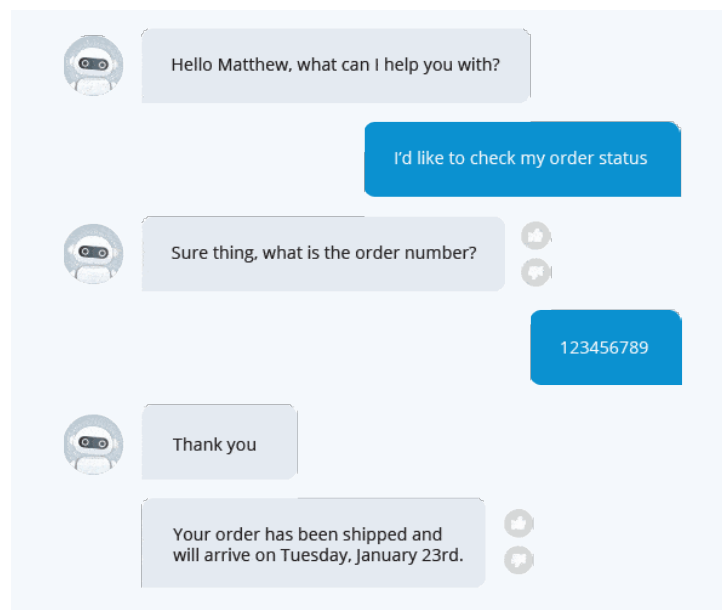
## 4. AI Chatbot

There is no doubt that well-trained agents are invaluable. However, often these fantastic agents have to spend large periods of the day fielding simple customer questions, preventing them from spending time on more complex issues or 'VIP' customers. This is where an AI Chatbot can revolutionize your customer service and take it up a level you didn't know existed!

Comm100's AI Chatbot can be used to answer routine questions or ask pre-chat questions in order to route the chat to the appropriate agent efficiently. It can also be set up when your agents are not online. Connect it to your other business systems and the Chatbot can even help customers book tickets or make payments.

Whatever your goals are as a company, the AI Chatbot can understand what a customer is trying to do, help them do it, or put them in touch with the person who can. Using Natural Language Processing (NLP) it can make sense of the wide range of human expression, language, and grammar, even understanding idioms and spelling mistakes.

Everyone knows that there are some conversations that bots just aren't meant to handle. Perhaps the visitor has a particularly complex issue, or a VIP logs on. In this instance, you may want to escalate to a human agent. By setting up smart triggers, an agent can be automatically brought in and can take over the conversation from the Chatbot with full visibility of previous chat history.



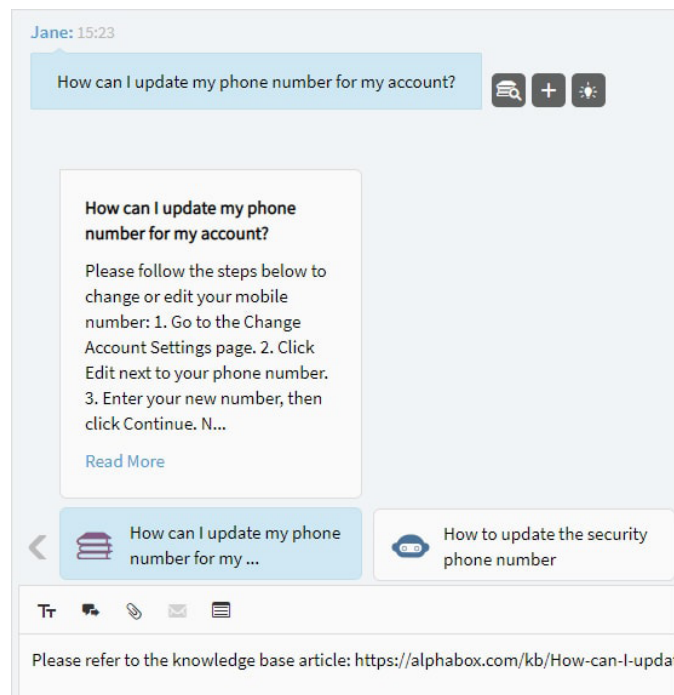
Comm100 AI Chatbot uses NLP to provide relevant answers and complete customer service tasks.

## 5. Agent Assist

As chat volumes increase, agent efficiency becomes increasingly important. Agent Assist is a key feature in any live chat agent's toolkit. Powered by AI, it helps your agents to respond to customer queries more quickly and accurately. How?

While your agent is chatting to the customer, Agent Assist is monitoring the conversation, interpreting the questions being asked, and then suggesting answers to your agent in real-time from your Knowledge Base, canned messages, and chatbot intents.

Because of this, the agent doesn't need to spend nearly as much time hunting for and typing out the answer. This means faster resolution and more time to focus on complex or sensitive issues. And since these suggested answers can be chosen with a double-click of the mouse, your agents will be able to handle more chats more quickly, resulting in shorter queues and happier customers. It's a win-win!



Comm100 Agent Assist interprets what the visitor is saying and suggests answers for your agent to use.



## The Wrap-up

You made it! Whether you have picked out the chapters that are of most interest to you and the stage you're at or you have heroically read this whole eBook from start to finish, you're well on your way to providing phenomenal customer support and proving your team's ROI.

If you take anything from this eBook however, remember that creating a winning live chat team is a marathon and not a sprint. While Comm100 is fast and easy to set up, building and training the perfect team will take time and effort.

Comm100 is a cloud-based system that can be quickly installed with very little effort and IT resources. Don't just take our word for it – hear what our customer has to say about their experience:

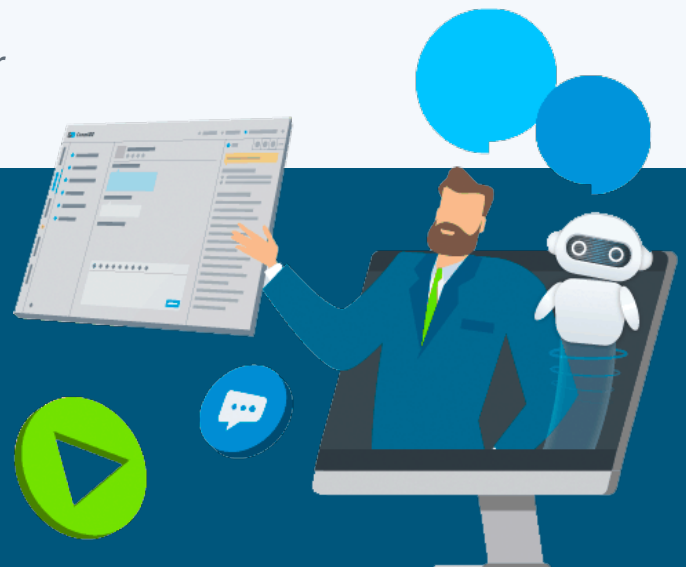
*"Where we often struggle as an organization is with software installation. We just don't have the IT resources, and we knew that a live chat solution that required a lot of time from our IT department would be met with a lot of resistance. As a cloud-based solution that could be quickly installed with very little effort, Comm100 was fantastic for us. The whole process was incredibly fast and smooth."*



- *Denny Michaud, Customer Relations Manager*

If you're interested in finding out more about Comm100, take a short product tour of our digital omnichannel platform and find out if it's the solution for you.

[Take a Tour](#)





## Let's chat

Comm100 is a leading global provider of omnichannel customer experience 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.

[Learn more](#)