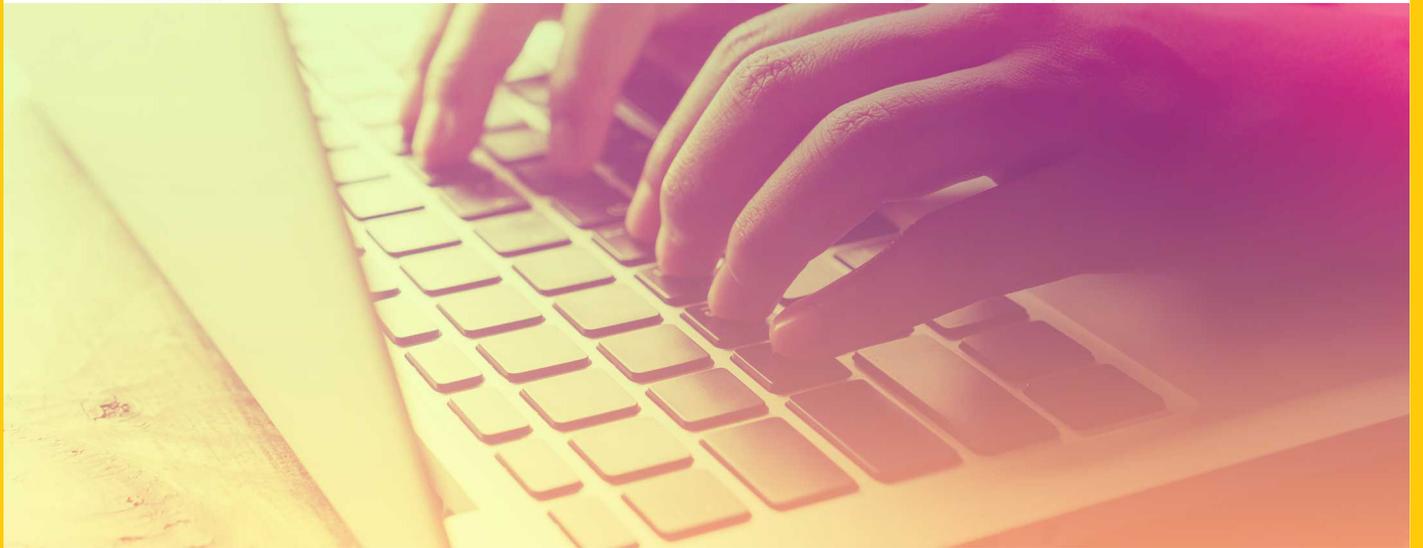


Olark
presents...



How-To Guide:

Live Chat Customer Support



**Prepared by Sarah Betts,
And the team at Olark**



Contents

- [1](#) — Introduction
- [2](#) — A few thoughts about Customer Support
- [3](#) — If this is your first time using a chat platform
- [5](#) — Before starting a chat shift
- [7](#) — Customer info in [The Olark Chat Console](#)
- [9](#) — Make a human connection with customers
- [12](#) — Tips for Trouble-shooting on Chat
- [14](#) — Ending the chat
- [15](#) — Dealing with trolls
- [16](#) — Other Resources
- [17](#) — Social!

Hi!

Thanks for requesting our how-to guide on live chat Customer Support.

If you're not familiar with Olark already—nice to meet you. We make live chat software for websites. More than 11,000 companies worldwide use Olark to make their businesses more human by talking directly to customers.

In the how-to guide below, we're going to talk about using live chat to provide awesome service for your customers. Since 2009, we've been learning all about Customer Support from our customers, their customers, and our own caring and creative Support team. We're still running into new questions every day, but we've also uncovered a few best practices that make for a great customer experience.

One of those best practices is—use live chat! If you're already using live chat as a Support tool, or considering adding it, you're already ahead of the curve. According to the [J.D. Power 2016 U.S. Chat and Email Benchmarking Study](#), "customers would much rather chat online with a Customer Support representative than speak to one live on the phone."

This guide is for everyone, from those just getting started with live chat to our weathered veterans looking to freshen up their skills, and from a single person on Support to agents and managers on a 100-person team. The tips and tricks below are the same ones we share with our new Support team members here at Olark.

We hope this guide helps you make your interactions with customers more human, and maybe even a little more fun. If you have any feedback or follow-up questions, you can email Karl (karl@olark.com). We'd love to hear from you!

Finally, all the credit for the content of this guide goes to Olarker Sarah Betts. [Give her a shout-out!](#)

And now—on with the show...

A few thoughts about Customer Support

“Life moves pretty fast. If you don’t stop and look around once in awhile, you could miss it.” - Ferris Bueller

Support is an intense job. There is no way around that. You have to be “On” for your entire workday. It’s nearly impossible to know what issues will come up.

Sometimes things will break, and you will be the “frontline” for customers who want to know why, and what your company is going to do to fix it. As such, you’ll face some angry customers; it’s just part of the job.

REMEMBER: it’s not about you—it’s about the product or the service, and your job is to make the customer feel heard, and understand what they need so you can help them.

If things get heated, try to remember a time when you were really upset and think about how you would have liked someone to respond.

You’ll deal with people from a wide array of backgrounds and with varying levels of expertise, and you’ll only get a very narrow glimpse into who they are, despite any and all attempts to collect data. Often these customers will come to you in a vulnerable state. There is something they need to work and they can’t figure it out, or they’re confused, or unfamiliar with the product. They need your help.

At Olark we have [a treasured value](#) to #Assume good faith. We do the best we can to start every interaction believing the other person is acting in good faith and doing the best they can with what they have. Assuming your visitors are doing their best should, at the very least, start your interactions on the right foot.

If this is your first time using a chat platform

“It feels like the first time. Feels like the very first time.” - Foreigner

If you're rolling out chat on your website for the first time, don't feel like you have to rush into it. Use your two week free trial to run some controlled experiments to understand how your platform works, and what kind of volume you can expect when you turn it on.

- **Did you know you can chat with yourself?** Try opening your site in an incognito window, and your chat platform in another, regular browser window, and switch between the two.
- **Take note of your visitor's experience.** You'll be spending more than enough time in your chat console, so take time in the beginning to understand what the user experience will be like. For example:
 - The visitors you're chatting with are chatting in a smaller window than yours. See what it's like when you send a long string of text.
 - See what it's like to send an image or a file. If you think you'll rely heavily on images, understand how they will appear.
 - You can customize the audible notifications your visitors hear when there is a response in chat. Put yourself in your customer's shoes and think whether they'd find those notifications helpful or annoying.
 - See how the conversation follows you from page to page, and make note if the chatbox loads funny on any pages on your site. It shouldn't, but sometimes there are code issues to resolve.
 - Take note of whether the chatbox blocks other parts of your site, like a checkout button or a Google Certified Seller badge. You might want to consider a different corner for chat, or create a click-to-chat button.

- Do the colors complement your site? You can easily customize colors, so make sure your chatbox isn't hidden within a background panel.
- If you decide to use automated messages, are they displaying properly? Ensure you haven't created an automated message that sends twice.

• **Try a controlled experiment for one week.** It's possible to only offer chat on one page of your website, like a 'Contact Us' page or a 'Pricing' page. Try this for one week and make some observations and record data like when you were busiest, how many chats you got, and what types of questions people asked.

• **If you're an Olark user,** take time to practice with features specific to our platform, such as:

- Commands (!case, !trigger, !end, etc.)
 - In a practice conversation, type !end to end the chat. This will help you see what the customer sees when you decide to end a chat.
- Shortcuts
 - If you don't have any Shortcuts yet, [go here](#) to create some. Try starting with ;hi and create a customized greeting for your visitors.
 - Then in your practice chat, type ; and select from the drop down list of preset messages.
- Try transferring a chat using the !Transfer command. You can either
 - Type !transfer and then type a short message about why you need to transfer the chat. This will make the conversation available to anyone on your team to answer.
 - Type !transfer @NAME to transfer a chat directly to someone else on your team. Just replace NAME with the screenname of one of your colleagues.

Before starting a chat shift

“Clear eyes, full hearts, can’t lose.” - Coach Taylor

Here are a few things we suggest our own agents do before they start their shift on chat.

Set up your environment

- Before beginning your chat shift, make sure your environment is set up for your needs. Is your chair or standing desk comfortable? Can you type for long periods of time without discomfort? Place your screen at a comfortable height to avoid neck and eye strain.
- Chat requires you to stay in one spot for extended periods. Grab a water bottle and some healthy snacks like nuts, dried fruit, or crackers. Nothing too messy!
- Do you frequently use resources such as books, measuring devices, etc. to answer questions from your website visitors? If you sell physical products, having some examples nearby can help answer unexpected customer questions

Open other tools and resources ahead of time

- Before setting yourself to accepting chats, load up any documentation you might need to refer to. Some examples are:
 - outside vendor websites
 - your own commonly requested help center articles
 - any test sites you have set up, and
 - online documentation.

- Where else do you go online for information? Your favorite search engine or Google Translate is good to have on hand as well.
- If you have a Support team or others you communicate with frequently, be sure to have those communication tools open as well. Even if you are a one-person team, chances are you talk to someone during the day to get inspiration, coordinate care for your customers, or just share hilarious memes.
 - For example, the Olark team uses [Slack](#) to stay in touch with each other (and we've used [HipChat](#) in the past).
 - We have a room dedicated to our Customer Support team so they can talk to each other in real time if they are faced with challenging customers or issues (our room is nicknamed #support-stegosaurus).
- Use an app to quickly grab a screenshot, gif, video or file to avoid ambiguous, rambling chats. Some cloud-based apps we like are:
 - [CloudApp](#) - capture and annotate screen recordings, images, screenshots, GIFs
 - [Screenshot.net](#) - free tool for taking screenshots
 - [Droplr.com](#) - send annotated screenshots, GIFs, and screen recordings
 - [Evernote Skitch](#) - for annotating images
 - [Grabbox for Mac](#) - for screenshot sharing
- If you're an Olark user: Review your Shortcuts. Even if you know what's in there, it can't hurt to review them again. Perhaps someone has added a new team Shortcut. Or perhaps you'll be inspired to create a new personal Shortcut. Changing your Shortcuts from time to time can help them sound more human.

Using customer information in The Olark Chat Console

"Use the Force, [Insert Your Name Here]." - Obi Wan Kenobi

The Olark Chat Console (chat.olark.com) will automatically detect some information about your customer. Olark sets some cookies that daylight information about the visitor, and uses a third party database to estimate a visitor's location based on their IP address.

This means that agents on chat will be able to see visitor information such as name, email, geolocation, browser, and any pages they are viewing or have viewed on your site. You can use this information in a number of ways to build rapport, make your interactions more human, and help the customer more effectively.

- **Customize your salutations.** For example:
 - Based on their location, acknowledge the time of day, e.g., . "Good morning" "Good evening"
 - Based on their location, reference a local sports team, e.g., . "Are you a fellow Bears fan?"
 - If they're a returning customer, reference a previous experience, i.e. "Welcome back! How was your previous order with us?"
 - If you're familiar with their location (based on IP address), you could reference a specific landmark, i.e. "I haven't had ice cream from Jac's in ages, are they still around?"

- **Help the customer find what they're looking for.** The chat console will show you the pages this visitor has looked at since they landed on your site; this information will give you insight into their needs:

- Are they digging through help articles with a common theme? Perhaps ask, "Can I help you learn more about our reporting feature?"
- Have they looked at several pages of sweaters? Perhaps ask, "We have some new sweaters this week, can I help you pick the perfect one?"
- Have they already visited a page that you're about to recommend they visit? Perhaps come up with another solution for their issue.

- **Provide browser-specific support.** If you know your site has certain quirks for specific browsers, you can give your visitors customized tips. Instead of telling them to look for an object or to "try" a method, you'll be able to direct them to the exact object and action they need to take.

- One example might be offering visitors instructions for how to clear cookies and browsing history in their browser. Instructions for Internet Explorer differ from those for Google Chrome.

Make a human connection with customers on live chat

"We could not talk or talk forever, and still find things to not talk about."
-Sherri Ann Cabot

When a customer does start a chat with you, it's a great opportunity to forge a human connection. Here are some ways you can make a good first impression in a chat, or continue to grow an existing relationship.

Get a good start

- **Respond Quickly.** Put the "Live" in "live chat!" Your visitor clicked on the chat widget to talk right now. Try to keep initial response times to 20 seconds or less; keep in mind that the longer your visitor sits waiting for a response, the more likely they are to leave.
- **Collect as much information as you can.** Some cases won't need much, such as when a visitor just needs a link or has a quick common question.
 - Note: if you get a question more than 3-4 times, it's a good idea to put the information in a knowledge base or help center article.
- **Integrate chat with a CRM.** Using an [integration](#) to connect your live chat platform with your CRM, Google Analytics or other tools will give you actionable information about your visitor. This information will give you insights into how they typically use your product, and what questions they've had in the past, like:
 - Are they new here?
 - Have they just opened an account?
 - Are they a VIP?

Communicate clearly

- **Match your visitor's tone on chat.** If someone hops on with a casual "Whazzup?!" you can be a little less formal (but still professional) yourself. If a customer approaches with a stiff tone, they may be in a hurry. Ask the questions you need to ask, and then resolve their issue as quickly as possible
- **Be very clear.** If you need time to look up something, tell them. Of course you are busy digging into the issue, looking up information, checking the account and pushing all the buttons. But your visitor on chat doesn't know that! Communicate what you are doing, and how long it will take.
- **Check in with the customer at least every 1-2 minutes if they're waiting for an answer.** When you're busy looking into an issue or helping several people, time flies. Imagine the chat from your customer's perspective—they've come to you for support and need help, so one or two minutes might seem like an eternity to them.
- **Reflect back to the customer what they are experiencing.** Reflecting is a skill used by communication experts, and is one of the fastest ways to de-escalate a situation. When reflecting, identify the issue the customer faced, how it impacted them, and how it made them feel. Find a part of their situation that you can empathize with. For example, "When your newsletter was misdelivered, coupon codes went out to the wrong customers. That would make me panic too." If someone knows you understand, they will be more receptive to your solutions.
- **Practice describing the steps a visitor might need to take to solve an issue.** If it sounds complicated, or circuitous, then try to simplify it. How clear and succinct can you make it? Support is not the place for long prose, which will generally make your process hard to understand.

Don't rush

- **Verify the need.** Often what a visitor asks for is unclear, or isn't what they actually need. For instance, they may request New Feature A, but your product already does it with Existing Feature B. Ask questions to find out how they will use the product, or what the end goal is.
- **Never assume.** Rephrase a request to verify you understood correctly. It may be that a seemingly complicated question is actually quite simple, or vice versa.
- **Get the backstory.** Review the customer's record to understand what the customer has asked in the past, and what others on your team have previously tried. Or, if this is the customer's first interaction with your company, ask what they have already tried. This can save a huge amount of time, and also help you understand what your visitor already knows about your product. Remember: everyone you talk to will have different skill levels, and will be at different stages with your product.
- **Know what they know.** Ask the customer what instructions or articles they've followed or read. Rather than just throwing a link at them, which can imply that they know nothing, find out what they already know. "Have you seen our article on polishing shoes?" is nicer than giving them a link they may have already viewed several times. Asking first allows them to tell you what they still need from you.

At the end of the day, Customer Support is about making sure people feel heard.

Suggested reading —

One of our favorite articles on Active Listening:

["What Great Listeners Actually Do"](#) - Harvard Business Review 2016

Tips for Troubleshooting on Chat

"Oh yes we've got Trouble, right here in River City. With a capital T and that rhymes with P and that stands for pool." - Harold Hill

Helping customers solve a problem is the keystone of providing good support on live chat. These are the primary steps we have our agents go through when troubleshooting.

- **Identify the issue**

- Never assume you know what the issue is. If the visitor's problem isn't clear, a simple "Can you tell me more about that?" can get more details quickly.

- **Get the reproduction steps**

- Find out, in as much detail as possible, exactly how the customer got to this point. Assume as little as possible. Remember that each individual will see your product differently.

- **Reproduce the issue**

- If this is a new issue, go through the same steps the customer took and try to replicate the issue.

- Document! This is a step where documentation can save you 100's if not 1,000's of hours over time. Keep track of steps you took to figure out what was happening and save your notes in a knowledge base, document, or internal wiki. That way you don't have to repeat your efforts the next time someone has a similar question.

- **Collect more data (if necessary)**

- Couldn't reproduce the issue? Have more questions? Ask. It's always good to get more information, and sometimes the customer will remember more details when you go back to ask more questions.

- **Communicate what you found**

- If the problem is on your side (e.g., a mistake you made, or a bug in your software), fix it, or give a resolution time. If the customer misunderstood your product or policies, correct them kindly.

- **Confirm with the customer**

- Find out if you've answered their questions—or just created more. What else can you help them with?

Ending the chat

"This is the end, of our elaborate plans, the end." - Jim Morrison

Every good customer interaction must come to an end, and live chat is no exception. Believe it or not, there are some tricks of the trade to ending a live chat conversation. Here are a few:

Anticipating the next question

- Given what you know about your product, what are the likely next steps for your customer? If they asked about tracking an order, let them know what to do if the order doesn't arrive. If there's another common question about the feature they're using, answer it proactively.

When it naturally ends

- It's easy to get into an extended exchange of goodbyes. If your customer says goodbye, or that's all, use a clear ending statement. "Thanks for chatting! I'm going to close this session for now, but please stop by anytime with questions." This is clean and clear, but doesn't stop your visitor from re-opening the chat if needed.

With overly chatty visitors

- Some people really love to talk. That's great if you're not too busy; it can give you a chance to get to know your customers better. But if you've got a massive chat load, emails piling up, and a meeting in 10 minutes, be politely honest! Let the visitor know you've really enjoyed the chat, but that you need to help other visitors. A visitor probably has no idea you have multiple chats; to them, the chat box is an invitation to just, well, chat.

Dealing with trolls

Hi! I'm [Orlak](#), the friendly chat Troll.

Today I'd like to talk to you about mean chat trolls. See, we trolls have gotten a bad rap lately. These days, when someone says 'troll,' they usually mean someone trying to stir up controversy on the Internet. Often times these people see a chat bubble as an open invitation to be a nuisance.

As much as it pains me to say, these mean trolls are out there and you may have to deal with them. It's really common, but also fairly simple. Some procedures we've developed at Orlak may help:

- Don't engage. As soon as you realize you're dealing with a troll and not a legitimate site visitor, stop responding. Some signs you've got a troll on the line include curse words (right away), all caps, a line of questions that has nothing to do with your product, or continuous, unprompted messages.
- If you're part of a team, alert your teammates. Give your team the troll's name and describe the tactics they used so others know not to engage.
- If things get offensive, your chat platform should offer the ability to block someone. In Orlak, use the !block command to stop the troll from sending messages.
- For persistent trolls, copy their IP address from your Chat Console and create a [Targeted Chat](#) rule to hide the chatbox on your site from them.
- If things get into illegal territory, especially if doxing - the threat to find and reveal private information about someone - or other serious threats are involved, don't be afraid to contact the local authorities. Be prepared to share a transcript of the chat and any other information you have.

Hope that helps! Remember: don't take it personally and don't let a troll spoil your otherwise great day.

Yours humanly - Orlak

Other Resources



Thanks for reading! If you've reached this point, then it's time for you to go out in the world and master live chat Customer Support on your own. If you'd like to continue learning, may we suggest:

Olark Customer Support Training Courses

- If you enjoyed this e-book, you can sign up for one of our [public webinars](#) that covers the basics of the Olark platform.
- We also offer some [Customer Service Courses](#) in which we cover basics for providing Customer Support - like an extension of this e-book.

Helpful Sources

- Talks + Books
 - [10 Ways to Have a Better Conversation](#)
 - [How to Win Friends & Influence People](#) by Dale Carnegie
 - [The Customer Support Handbook](#) by Sarah Hatter
 - [The Effortless Experience](#) by Matthew Dixon
 - [Exceptional Service, Exceptional Profit](#) by Leonardo Inghilleri & Micah Solomon
 - [Nonviolent Communication](#) by Marshall B Rosenberg
- Olark Blog Posts
 - [Articles Tagged Customer Support](#)
 - [What new Olark users should learn first](#) (Don't be Lucy)
 - [How to handle customer complaints effectively - Avoid escalation](#)
 - [Why customers will spend more if you start with a smile](#)
- Blog Posts from Other Companies
 - [Answer, Anticipate, Elaborate](#)
 - [Live Chat Support Tips](#)
 - [5 Tips and Tricks for Amazing Customer Service](#)
 - [4 most important elements of excellent customer service](#)
 - [The 29 Best Tools and Resources for Customer Support Professionals](#)
 - [3 Steps to Grow a Successful Live Chat Program](#)

Social!



Hey! We post fun stuff on social media too:



www.twitter.com/olark

www.linkedin.com/company/olark

www.facebook.com/olarklivechat

www.instagram.com/olarklivechat