Top 12 Best Practices for Implementing Chat

Live chat software can provide an easy and effective means of engaging with customers to drive revenue, improve loyalty, and deliver exceptional service. By instituting the 12 best practices detailed here, you can ensure a successful chat implementation.

1. Plan Your Chat Deployment
   Planning and preparation increase customer adoption, agent productivity, and return on investment.

2. Provide a Consistent Experience
   Regardless of how customers interact with your company, they expect a consistent experience. This extends to the information provided on chat pages, including policies, procedures, and entitlements. It also extends to the look and feel of the chat pages themselves.

3. Integrate Chat with Your Business
   By integrating customer data (including product purchase history, promotional offers, contracts, and case history) with your chat software, you can make your agents more effective. The more information they have about customers, the better they'll understand those customers' needs, making it easy to formulate appropriate responses. The result: increased first-call resolution and customer satisfaction.

4. Provide a Shared Knowledgebase
   The agent knowledgebase, standard text, canned messages, snippets, and URLs should all be shared and integrated. Creating and maintaining individual information repositories is not only expensive and difficult but also increases the risk of creating and using contradictory information.

5. Ensure Privacy and Security
   Take measures to reduce risk and alleviate customer fears about privacy and security. Publish and clearly label the security and privacy policy. And if specific items (such as credit card and Social Security numbers) should not be shared, make sure this restriction is communicated up front. Use technology to limit exposure. Review and monitor policies and procedures with agents to ensure compliance.

6. Hire the Right Skill Set
   Select, hire, and train for chat-oriented skills such as the ability to communicate well in writing and to multitask. If the call center uses a blended staffing model, assign agents to handle chat plus e-mail rather than chat plus phone. This makes better use of the required skill set.
7. Staff According to Business Value
Establish chat hours of operation and staff according to business value. Web analytics can provide historical trends in the number of customer sessions or visits to your Website. With this data in hand, you should be able to identify peak traffic times and high-traffic pages. If Web traffic data is not available, phone traffic patterns can be used instead to identify peak times.

8. Provide an Agent Training Plan
Before introducing the chat service, create an agent training plan that includes how, where, and when you plan to train the staff.

9. Align Your Organization for Success
Align chat personnel with organizational goals. Service-related chat should be routed to and handled by service chat agents (who should be aligned with and report through the service organizational chart). Likewise, sales-oriented employees should be aligned with and report through the sales organization and should handle sales-related chat. This structure ensures that personnel are aligned with departmental goals and that those goals are properly focused.

10. Review Chat Performance
Establish quality targets, and audit performance.

11. Shoot for Continuous Improvement
Select metrics that align with business goals. Monitor and apply lessons learned for continuous improvement.

12. Optimize Application Performance
- **Environmental configuration.** Ensure that your environment is configured in accordance with the “Environmental Configuration Guide,” available in the RightNow Community. In addition, the Workstation and Network Data Collector (rntinfo.bat file) is useful for collecting information about your agent workstations and network performance. The rntinfo.bat file can also be downloaded from the RightNow Community.
- **Optimal chat network configuration.** Your chat network must also be configured for optimal performance. Specific information regarding proxy servers, routing, and network saturation is provided in the RightNow Community.
- **Connectivity.** Ensure that your site has sound connectivity both internally and externally. Oracle RightNow Chat Cloud Service is much more sensitive to connectivity issues than most other applications, due to its continuous-connectivity requirements.
- **Current release.** Ensure that you’re running the latest release of Oracle RightNow CX Cloud Service. Each release includes improvements that contribute to the overall usability and stability of your chat application.

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