Best Practices: Online Chat Sales

Boosting customer service and sales ROI

Benchmarking study | White paper
February 2011

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OVERVIEW

When it comes to shopping, the web offers convenience, choice and information. As a result, consumers continue to move more of their shopping online, or make in-store purchase decisions that are “web-influenced” first. Online retail sales in the U.S. are forecast to grow to $250 billion by 2014.¹ This presents a tremendous opportunity for companies with a web presence to grow their customer base and provide top-notch customer service and sales within the online environment itself.

It’s not surprising that online chat is gaining more attention as a growing customer service delivery method—especially with evidence of significantly increased sales ROI as well as some of the highest customer satisfaction (CSAT) scores over phone or in-store purchases. What is surprising, however, is that a number of leading online companies do not offer chat, especially chat for sales, despite growing consumer preference for it. And when chat is offered, the overall customer experience can be improved.

To validate best practices for online chat sales and to help companies maximize online sales and customer service, TELUS International commissioned a benchmarking study using an independent consulting firm, SPOT Consulting. Sixty in-depth web chat sessions were conducted with six Fortune 500 companies to analyze the qualitative metrics of an ideal online chat sales session. The results were scored against three major criteria that contribute to the total customer experience:

1) Agent skills
2) Chat system features
3) Communications style

Results, conclusions and recommendations for best-in-class sales chat are detailed in this white paper.

Online Chat Growth and Preference

Chat is increasingly preferred among a rapidly growing segment of online consumers. This preference may be so significant in those segments that other traditional forms of communication are no longer a factor.

As consumers migrate online to manage their business transactions and decisions, the influence of chat on the customer experience will continue to increase. A recent report states that one-fifth of both Gen Y (ages 18-27) and Gen X (ages 28-40) consumers located and engaged in online chat when they visited a company’s website. Comparatively, just one-tenth of boomers and seniors take advantage of chat.² As boomers and seniors move closer to retirement, their financial influence in the global marketplace will be replaced by Gen Y and X.

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¹ Forrester Research – U.S. Online Retail Sales, 2009 to 2014
The sales metrics linked to online chat implementation also reflect its growing importance. According to a number of industry reports released recently:

- 67 percent of shoppers with a previous chat experience continue to actively seek chat options on merchant websites;\(^3\)
- 77 percent of chat users agree the new interaction method positively influences their attitude about the retailer they were considering buying from;\(^4\)
- 63 percent of respondents reported they were more likely to return to a website after experiencing live chat;\(^5\) and
- 38 percent stated they purchased from the e-commerce website as a direct result of the chat session itself.\(^6\)

**Proactive vs. Reactive Chat**

Online chat can be deployed in different ways. Some platforms are designed to be reactive. They require the user to actively click a button on the host’s website to “chat with us.” Other vendors favor a proactive approach. Instead of waiting for a potential customer to click the button, they invite website visitors to engage with an agent. This invitation, generally in the form of a pop-up window, is triggered by a variety of pre-determined criteria, ranging from abandoned shopping carts, a set of page views, or the appearance of high-value customers.

**Impressive ROI**

The popularity of online chat among customers has led to significant ROI, which varies depending on how actively chat is deployed. Proactive chat produces more striking results. In one recent study, reactive chat earned a 15 percent return on investment, compared to proactive chat’s impressive 105 percent.\(^7\)

**Benefits of Online Chat**

Online chat delivers rapid, personalized and timely communications through direct interaction, resulting in a wide range of benefits:

- Chat shortens the sales process by creating additional positive impressions that move a prospect quickly and efficiently through the sales cycle while resolving customer issues and objections immediately.

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\(^3\) Bold Software Survey (2010)
\(^4\) Bold Software Survey (2010)
\(^5\) e.Marketer.com Survey (2009)
\(^6\) e.Marketer.com Survey (2009)
\(^7\) Forrester Research - The ROI of Interactive Chat, page 1 (2008)
Chat reduces overall contact center costs by reducing average interaction costs, while allowing customers to quickly and easily access additional information online. This leads to happier, more satisfied customers and fewer future calls.

Chat helps close sales by allowing agents to recover customers before they abandon a transaction and assist them with the completion of order forms.

Chat allows for increased transaction values by creating up-sell and cross-sell opportunities.

Chat agents can multi-task. Well-trained and well-equipped agents can handle multiple chats simultaneously due to the time it takes customers to type in their questions or view information – all without sacrificing customer experience.

Surprisingly, Still a Limited Channel

Despite these benefits and the general appetite for online chat among the public, online sales chat is often unavailable. When it is offered, the customer experience can be improved. While there have been significant developments to the software and online platforms, technical aspects of the chat channel often overshadow the importance of the human aspects of the customer service engagement. Correctly implemented, chat can re-introduce the “human element” into the online interaction to significantly enhance the quality of the total customer experience.

Online Chat Benchmarking Study

To examine the metrics of the ideal online chat sales session, TELUS International commissioned a benchmarking study using an independent consulting firm, SPOT Consulting, to analyze the best online customer service experiences across a variety of industries. This research focused on the qualitative benchmarks of e-commerce chat services specifically, analyzing companies that lead their industries in terms of customer experience. In-depth critiques of chat sessions were conducted to determine best practices to maximize both customer experience and ROI.

METHODOLOGY

Thirty companies were originally considered for the study; however, the vast majority did not offer an online chat sales option. From the initial list, six benchmark companies with established online chat sales programs were selected, three of which were industry leaders in the consumer electronics segment and three of which were noted for their superior customer service. Preliminary selection was based on publicly available American Customer Satisfaction Index or Net Promoter Scores. See Table 1.
Table 1: Selected benchmarks were large companies with significant market presence

<table>
<thead>
<tr>
<th>Company</th>
<th>American Customer Satisfaction Index (ACSI)</th>
<th>Net Promoter Score (NPS)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consumer Electronics Innovator</td>
<td>86</td>
<td>77</td>
</tr>
<tr>
<td>Large Technology Provider</td>
<td>77</td>
<td>Unavailable</td>
</tr>
<tr>
<td>Big Box Electronics Retailer</td>
<td>74</td>
<td>45 – online 29 – retail</td>
</tr>
<tr>
<td>Online Specialty Retailer</td>
<td>N/A</td>
<td>90 – phone 83 – email</td>
</tr>
<tr>
<td>Upscale Clothing Retailer</td>
<td>83</td>
<td>Unavailable</td>
</tr>
<tr>
<td>Large Office Supplies Retailer</td>
<td>77</td>
<td>Unavailable</td>
</tr>
</tbody>
</table>

At the time of publication, all of the benchmark companies offered reactive chat, but not proactive chat. The majority of them offered chat seven days a week. All except one featured U.S.-based agents. See Table 2.

Table 2: Hours of operation for sales chat and agent location of benchmarked companies

<table>
<thead>
<tr>
<th>Company</th>
<th>Hours of Sales Chat Operation</th>
<th>Agent Locations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consumer Electronics Innovator</td>
<td>6a – 11p PT Mon – Sun</td>
<td>Florida, Texas, California</td>
</tr>
<tr>
<td>Large Technology Provider</td>
<td>4a – 11p PT Mon – Fri 6a – 6p PT Sat – Sun</td>
<td>Philippines</td>
</tr>
<tr>
<td>Big Box Electronics Retailer</td>
<td>5a – 9p PT Mon – Sun</td>
<td>Texas</td>
</tr>
<tr>
<td>Online Specialty Retailer</td>
<td>6a – 6p PT Mon – Fri</td>
<td>Nevada</td>
</tr>
<tr>
<td>Upscale Clothing Retailer</td>
<td>4a – 10p PT Mon – Sun</td>
<td>Iowa, Washington</td>
</tr>
<tr>
<td>Large Office Supplies Retailer</td>
<td>5a – 5p PT Mon – Fri</td>
<td>Kentucky</td>
</tr>
</tbody>
</table>

A total of 60 in-depth chat sessions were conducted with our six benchmark companies. Chat sessions were scored by subject matter experts in the fields of communications, editorial, marketing and contact center excellence across 20 variables covering three weighted focus areas:

1. Agent skills – 40% weighting
2. Chat system features – 35% weighting
3. Communications style – 25% weighting
RESULTS

Benchmarking Focus Area 1: Agent Skills – 40% weighting

Agent skills are critical to delivering a positive customer experience. In order to evaluate agent skills, six key variables were identified for benchmarking purposes. These variables and success attributes included:

1. **Average Response Time (ART):** Average response time refers to the time between customer questions and agent responses. The customer expectation is real-time response. For the ideal chat session, responses were provided within 30 seconds.

2. **Expectation setting:** Expectation setting focused on whether or not the agent gave an estimated wait time for delayed responses.

3. **Accuracy of responses:** Response accuracy is paramount to ensuring customer satisfaction and maintaining the overall integrity of the brand. For benchmarking purposes, chat transcripts were analyzed for inaccurate, conflicting or confusing information.

4. **Direct objective responses:** Best-in-class chat responses directly answered customer questions, included only one or two ideas per response, and avoided promotional copy.

5. **Conversation flow:** Customers expect a personalized, brand-appropriate experience, even when using online chat. Ideal online chat conversations needed to flow with the appropriate use of scripted versus free form responses.

6. **Patience:** Questions should be resolved accurately while agents drive to closure. Agents should not rush a chat session to hit efficiency metrics.
As expected, some of the most skilled customer service agents were associated with a company whose business is entirely focused on online sales.

Our analysis of the transcripts highlights the general importance of problem solving and the fact that less scripting and more proactive solutioning led to significant improvements in customer satisfaction. Overall, an agent’s ability to move beyond standardized procedures led to improved conversation flow. This improved general engagement. The best agents in this category also solved problems and found additional information quickly.

Further, the Online Specialty Retailer agents were empowered to offer incentives, such as expedited shipping, in order to close the sale. This also contributed towards increased customer satisfaction.

Similar research confirms our findings. One recent study concluded that an informal and friendly interaction was directly linked to successful chat interaction—the ultimate aim being to simulate the experience of phone or instant messaging by providing a quick and relevant answer. In some cases, Tier 1 agents presented with more challenging queries were able to transition the issue to a Tier 2 agent without the customer ever being aware of the escalation.⁸

In the case of lower-scoring chat sessions, agents tended to give delayed responses and the quality of the answers was not reflective of the time taken to gather the information. Low-scoring agents failed to respond directly to questions, gave vague answers, answered

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questions with questions, shared hyperlinks that did not work, and used unnecessary promotional copy. As a result, the conversation flow tended to become awkward and forced – often brought to an abrupt close as agents rushed customers off the chat.

In some of the lower scoring chat sessions, we observed customers being pushed to a non-preferred channel in order to resolve their question, typically to an 800 number. When higher scoring agents encountered an issue they could not resolve, they offered to instantly connect the chat to another department, in addition to providing an 800 number for later follow-up. In general, among the higher scoring chats, agents tended to be accountable to all customers, and not just the sellable ones.

Benchmarking Focus Area 2: Chat System Features – 35% weighting

Chat system features from the chat window or the platform itself are critical to enabling online communications and setting customer expectations. When evaluating a successful sales chat offering, the following nine variables were examined:

1. **Hours of operation**: Did the chat system set customer expectations with posted hours and days that chat is offered, including time zones?
2. **Chat transcripts available**: Did the chat system provide the ability to save or email chat transcripts for future reference?
3. **Typing notification**: Did a message appear when the agent was typing a response?
4. **Queue position**: Was a queue number provided to set expectations on wait time?
5. **Wait time**: Was an estimated wait time for reaching an agent provided?
6. **Entitlement process**: Was the completion of an online form required to enter the chat session? The analysis sought to identify a balance between collecting enough information to inform the chat session without burdening the customer with forms too early in the interaction.
7. **Encryption of sensitive information**: Did the system automatically mask personal information?
8. **Added features**: Did the chat window provide additional features such as changing of font size, or hyperlink to security information?
9. **System availability**: Was the chat platform reliable? Did customers experience a system lag time or dropped chat session?
Our review of the features of an ideal chat system highlights the general importance of customization, which provides customers with easy access to information as well as a strong sense of security. In this study, the high ranking Big Box Electronics Retailer provided a highly customizable chat system which included the usual standard features along with easily obtainable transcripts, personalization options such as the ability to increase fonts, and upfront hyperlinks to their security and privacy policies. The Upscale Clothing Retailer also scored well by providing encrypted number masks as customers typed their personal information in the chat window.

Lower scores were correlated with chat sessions where the platform was unable to provide complete post-session chat transcripts via email. In addition, there were inconsistencies in the availability of the chat service, and the live chat option was frequently dropped from the website. When chat was available, system lags and conflicting hours of operation hindered access to agents. Even during posted chat hours, agents were often unavailable. This led to customer frustration and disengagement.

To solve some of the chat system availability concerns, it is worth considering the use of dynamically available chat icons which only present themselves when agents are available to answer chat requests.
Benchmarking Focus Area 3: Communications Style – 25% weighting

The final key area analyzed was communications style – a critical element in conveying brand and agent credibility. The following five variables were analyzed for benchmarking purposes:

1. **Brevity and staying on point**: Chat users expect instant gratification. As a result, the ideal chat session should keep sentences short and to the point. Responses must directly relate to the customer question.

2. **Grammar, spelling and sentence structure**: Writing effective chat communication can be an art. Responses must adhere to most grammatical rules, including capitalization and punctuation. Accurate spelling is critical to support agent credibility. The most important content should appear at the beginning of responses. Formal responses require the use of complete sentences, whereas less formal responses may contain sentence fragments.

3. **Voice and tone**: Voice and tone should reflect corporate identity and chat should conform to the personality of the site (e.g. informative, professional, innovative). Voice should express the mood or feeling of the conversation (e.g. friendly, upbeat, conversational) in order to humanize the online experience.

4. **Terminology**: Language used should have mass U.S. appeal. Regional slang, clichés and other references should be avoided. Minimize the use of technical terms and acronyms that may not be familiar to readers.

5. **Personalization**: For a best-in-class chat experience, agents should use the customer’s name and other customer-provided information to personalize their responses as much as possible.

*Figure 3: Communications style – scoring across benchmarked companies*
When evaluating chat communications style, the Upscale Clothing Retailer scored highest. Their customer service agents were professional and consistently applied proper grammar and punctuation in all sessions. In general, the chat experience simulated having one’s own personal shopper on the website.

The most effective chat agents kept their responses short and to the point, often including a link to further explain more complex issues such as website security, shipping policies and data encryption.

In contrast, the lowest scoring chat sessions featured agents that tended to be disengaged and impersonal. This was compounded by poor grammar and word choice, which not only disconnected them from their chat customers, but added unnecessary confusion to the sales process.

This research is consistent with other recent studies regarding the importance of hiring and training agents for writing skills. While smiley faces, shortcuts and even occasional typos are acceptable in a chat interaction, too many mistakes can appear unprofessional and detract from a company’s cultivated brand. Verbise, highly technical explanations should also be avoided. Ideally, answers should be kept short and avoid scripted phrases as they tend to come across as stiff and formal. In addition, conversations should include multiple exchanges and back-and-forth messages.

Finally, with company websites offering a wealth of information, agents should leverage web content as a way to provide more detailed information, with the caveat against simply pushing URLs that force customers to hunt for the information. From the study, the best agents gave succinct answers to customer questions and then asked permission to send a URL for further information on the customer issue.

CONCLUSIONS

Customer Experience – Bringing it All Together

Agent skills, chat system features, and communications style all contribute to the total customer experience. Overall, the Upscale Clothing Retailer achieved the highest ranking in our study. In reviewing the highest rated chat experiences, attributes related to agent skills included the ability of agents to respond quickly with relevant and personalized information that moved the conversation along a consultative sales path, as well as the presence of empowered agents who could break down process silos and collaborate with other departments in order to deliver coordinated and well-executed customer experiences.

10 nGenera – Making Online Chat Successful, pages 3-4 (2009)
With respect to chat systems, positive attributes included reliability and availability, and the best chat experiences featured automatic data encryption which enabled agents to complete transactions securely while supporting customers in their preferred channel.

Finally, with respect to agent communications style, the key positive attributes included clear and concise communications to convey meaning in the absence of vocal tone and facial expression, as well as correct grammar and word choice consistent with the brand promise of the company. These attributes were hallmarks of the highest ranking chat sessions in the study, and are consistent with the high customer experience rankings earned by the selected benchmark companies.

**Figure 4: Weighted results across agent skills, chat system features, and communications style**

As a final validation of our findings, we subjected another 150 of our own chat sessions to the same criteria. Since the primary metrics of online chat sales sessions would be sales related, we targeted the chat queues with the highest total contract value, contribution margin and total revenue. Those queues with the highest sales metrics were also the queues with the highest scores in agent skills, suggesting a strong correlation between sales ROI and agent skills.

Key customer experience variables are summarized in Table 3 along with relevant customer expectations and performance metrics.
Table 3: Chat policy imperatives

Agent Skills & Communication

<table>
<thead>
<tr>
<th>Customer Expectations</th>
<th>Chat Policy</th>
<th>Performance Metric</th>
</tr>
</thead>
<tbody>
<tr>
<td>Real-time response</td>
<td>Responses should be provided within 30 seconds</td>
<td>Average Response Time (ART)</td>
</tr>
<tr>
<td>Effectively facilitates sales</td>
<td>Questions should be resolved accurately and agents should drive to closure.</td>
<td>Customer Satisfaction (CSAT)</td>
</tr>
<tr>
<td></td>
<td>Agents should be empowered to resolve basic problems or seamlessly transfer to other departments</td>
<td></td>
</tr>
<tr>
<td>Personalized, brand-appropriate experience</td>
<td>Responses should avoid scripting, adhere to basic grammar rules, and support the voice of the company</td>
<td>Quality of Communication</td>
</tr>
</tbody>
</table>

Chat System

<table>
<thead>
<tr>
<th>Customer Expectations</th>
<th>Chat Policy</th>
<th>Performance Metric</th>
</tr>
</thead>
<tbody>
<tr>
<td>Security and privacy</td>
<td>Enable agent to complete customer transactions through one process</td>
<td>Automatic data encryption</td>
</tr>
<tr>
<td>Fluid conversation</td>
<td>No lag time or dropped chats. Customers shouldn’t have to ask, “Are you still there?”</td>
<td>Display queue position, wait times, and typing notification</td>
</tr>
<tr>
<td>Easily retain information</td>
<td>Customers can reference information they learned during a chat session in the future</td>
<td>Email or print chat transcripts</td>
</tr>
</tbody>
</table>

Integrating Chat into the Contact Center — Further Considerations

In reviewing the chat interactions, a number of issues were identified that impact the way in which a chat platform is integrated into the contact center environment.

With respect to agent skills, the ability of an agent to provide correct and helpful responses is likely to be dependent on whether the agent is accessing a unified knowledge base. Chat systems and knowledge bases must be configured so that exactly the same information is available on the corporate website, from a live agent, or from an online chat session.

Agents can very quickly erode the trust of the customer if they provide conflicting or inaccurate information. In order to expedite the delivery of accurate information, the chat platform should also support real-time collaboration and internal instant messaging between agents, supervisors and subject matter experts within the contact center.

In acquiring a customer service platform for the web, building out the knowledge base is often the biggest investment. Knowledge bases are extremely difficult to port among...
different vendor’s products, so the selection of a chat platform, or a more full-featured web customer service platform, is a crucial and strategic decision.

Integration of chat into the contact center CRM (customer relationship management) system is also important. To the extent that agents are provided the latitude to close a sale, bi-directional integration with CRM or customer information systems is a requirement. Empowered agents need to be able to access customer information and previous interaction histories, if available, and have immediate access to business rules for closing the sale.

**RECOMMENDATIONS**

Given that agent skills may be a leading factor in effective online sales chat, there are a number of opportunities for improving the customer experience:

1. Train for chat. Educate agents about the differences between chat and phone-based selling. A good telesales agent will not necessarily be a good chat sales agent.

2. Teach agents how to construct a conversation flow that fits the needs of the customer and the online retailer. This includes the company’s policy regarding the use of “canned” responses versus free form.

3. Identify and train agents on the appropriate voice and tone to support the brand, and focus on the appropriate amount of personalization.

4. Ensure agents are trained properly on the chat technology platform itself and fully understand policies around chat-related functions such as co-browsing, document sharing, and page pushing.

5. Ensure agents possess significant and updated product knowledge, and understand the differences between up-sell options in order to maximize sales metrics.

6. Invest in writing skills. Agents, particularly offshore, require training on basic writing skills to ensure a consistent, positive customer experience.
About TELUS International

TELUS International is the global arm of TELUS, a leading national telecommunications company in Canada, with $9.7 billion of annual revenue and 12.1 million customer connections. For more than 100 years, TELUS has delivered innovative telecommunications solutions to consumers and businesses including data, Internet protocol (IP), voice, wireless, entertainment and video.

Named as one of Canada’s 10 Most Admired Corporate Cultures by Waterstone Human Capital, TELUS is the only North American telecom listed nine straight years on the Dow Jones Sustainability World Index and is one of only nine Canadian companies across all sectors to be named among the Global 100 Most Sustainable Companies in the World in 2010 by Corporate Knights research firm.

TELUS International delivers world-class contact center, IT and business process outsourcing solutions to some of the world’s largest and most respected corporations in the financial services, consumer electronics, telecommunications, and energy and utilities industries. Our multi-channel programs include voice, email and chat channels. For more information about our contact center outsourcing solutions and improving your customer’s online chat experience, contact Emily Millar at emily.millar@telus.com.

Learn more about TELUS International:
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Email: information@telusinternational.com
Twitter: @TELUSint

About SPOT Consulting LLC

SPOT Consulting was commissioned by TELUS International to perform the benchmarking chat study. SPOT Consulting is an Austin-based consulting firm focused on contact center performance and business process outsourcing. Their clients are generally Fortune 100 organizations including Sony, IBM, Apple, Best Buy, American Airlines, American Express and Sprint. For more information, visit http://spotconsulting.biz. For further information on SPOT’s Market Intelligence experience and capabilities, contact Kim Keating at kim@spotconsulting.biz.
### Appendix: Chat Considerations Checklist / Summary

#### Agent Skills

<table>
<thead>
<tr>
<th>Chat attribute</th>
<th>Basic description</th>
<th>Considered</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average Response Time (ART)</td>
<td>Set metrics for time between customer question and agent response</td>
<td>☐</td>
</tr>
<tr>
<td>Expectation setting</td>
<td>Agents to provide estimated wait time for delays</td>
<td>☐</td>
</tr>
<tr>
<td>Accuracy of responses</td>
<td>Avoid inaccurate, conflicting or confusing information</td>
<td>☐</td>
</tr>
<tr>
<td>Direct objective responses</td>
<td>Provide direct answers to questions, devoid of promotional copy</td>
<td>☐</td>
</tr>
<tr>
<td>Conversation flow</td>
<td>Provide a balance of scripted vs. free form responses</td>
<td>☐</td>
</tr>
<tr>
<td>Patience</td>
<td>Ensure chat sessions are not rushed to hit efficiency metrics</td>
<td>☐</td>
</tr>
</tbody>
</table>

#### Chat System Features

<table>
<thead>
<tr>
<th>Chat attribute</th>
<th>Basic description</th>
<th>Considered</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hours of operation</td>
<td>Hours and days of operation posted, including time zones</td>
<td>☐</td>
</tr>
<tr>
<td>Chat transcripts available</td>
<td>Ability to save or email chat transcripts for future reference</td>
<td>☐</td>
</tr>
<tr>
<td>Typing notification</td>
<td>Indication appears when agent is typing a response</td>
<td>☐</td>
</tr>
<tr>
<td>Queue position</td>
<td>Queue numbers provided to set expectations on wait times</td>
<td>☐</td>
</tr>
<tr>
<td>Wait time</td>
<td>Estimated wait time provided for reaching an agent</td>
<td>☐</td>
</tr>
<tr>
<td>Entitlement process</td>
<td>Information collected prior to engaging customers</td>
<td>☐</td>
</tr>
<tr>
<td>Encryption of sensitive information</td>
<td>Personal information masked on the system</td>
<td>☐</td>
</tr>
<tr>
<td>Added features</td>
<td>Additional features provided like changing font size, or dynamic icons</td>
<td>☐</td>
</tr>
<tr>
<td>System availability</td>
<td>Chat platform is reliable with no lag times or dropped sessions</td>
<td>☐</td>
</tr>
</tbody>
</table>

#### Communications Style

<table>
<thead>
<tr>
<th>Chat attribute</th>
<th>Basic description</th>
<th>Considered</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brevity and staying on point</td>
<td>Short sentences directly relate to customer questions</td>
<td>☐</td>
</tr>
<tr>
<td>Grammar, spelling, structure</td>
<td>Effective communications support agent / company credibility</td>
<td>☐</td>
</tr>
<tr>
<td>Voice and tone</td>
<td>Chat conforms to corporate identity and personality</td>
<td>☐</td>
</tr>
<tr>
<td>Terminology</td>
<td>Language has mass appeal, minimizes technical terms and acronyms</td>
<td>☐</td>
</tr>
<tr>
<td>Personalization</td>
<td>Agents use customer name and other personal information gathered during chat</td>
<td>☐</td>
</tr>
</tbody>
</table>
## Chat Platform Selection

<table>
<thead>
<tr>
<th>Chat attribute</th>
<th>Basic description</th>
<th>Considered</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unified knowledge base</td>
<td>Chat systems and knowledge bases configured to access the same information</td>
<td></td>
</tr>
<tr>
<td>Real-time collaboration</td>
<td>Chat platform supports real-time collaboration and internal instant messaging between agents and experts</td>
<td></td>
</tr>
<tr>
<td>Integration with CRM</td>
<td>Agents can access previous customer interaction histories to better close sales</td>
<td></td>
</tr>
</tbody>
</table>

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