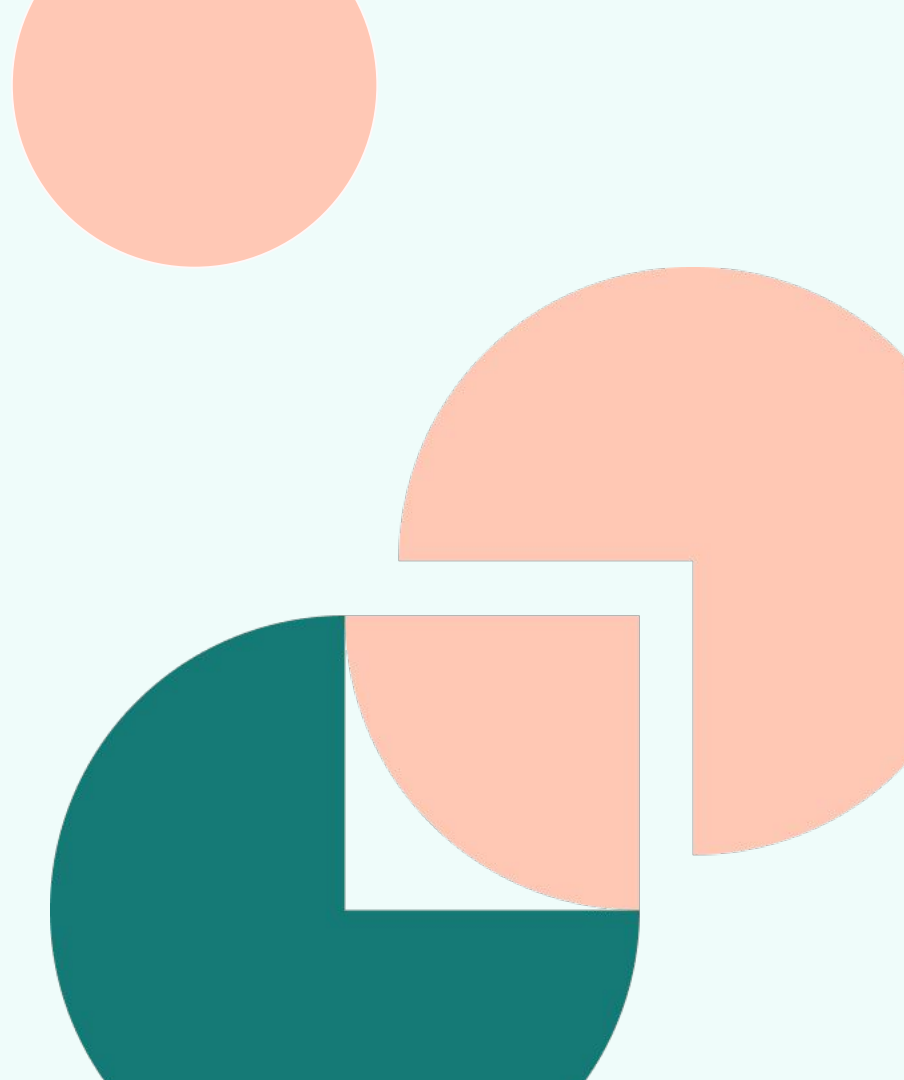


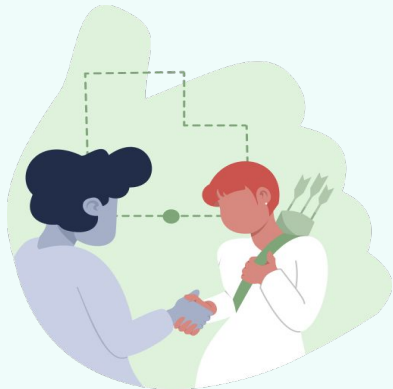
# Smiley Analysis

Homesite Edition | December 2023

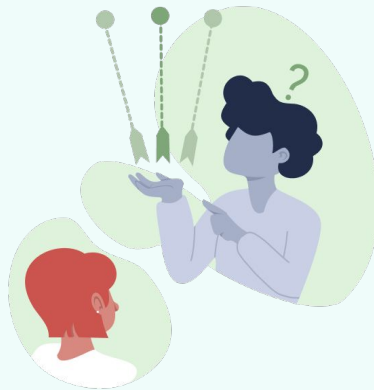


## AGENDA

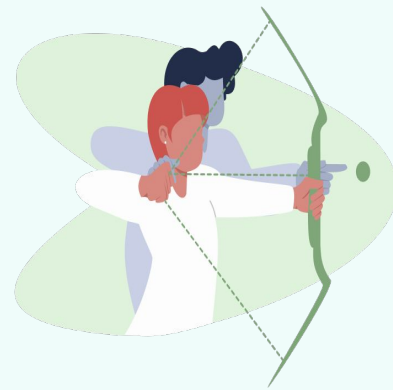
- 01 Review of the 5As**
- 02 Unveiling the Data**
- 03 October Charts Revisited**
- 04 Introducing New Insights**
- 05 Spotlight on Advisor Excellence**
- 06 Action Plan for 5As Enhancement**



**1. Acknowledge** the merchant's question/issue by repeating it back to them



**2. Ask** context gathering questions



**3. Align** with the merchant to let them know you relate to them



**4. Assure** the merchant that you can resolve their issue



**5. After** the issue has been resolved, describe the problem that you have solved and ask the merchant if this sufficiently solves the issue for them

# The Data

59

Chat Transcripts

43

Smileys

7

Neutrals

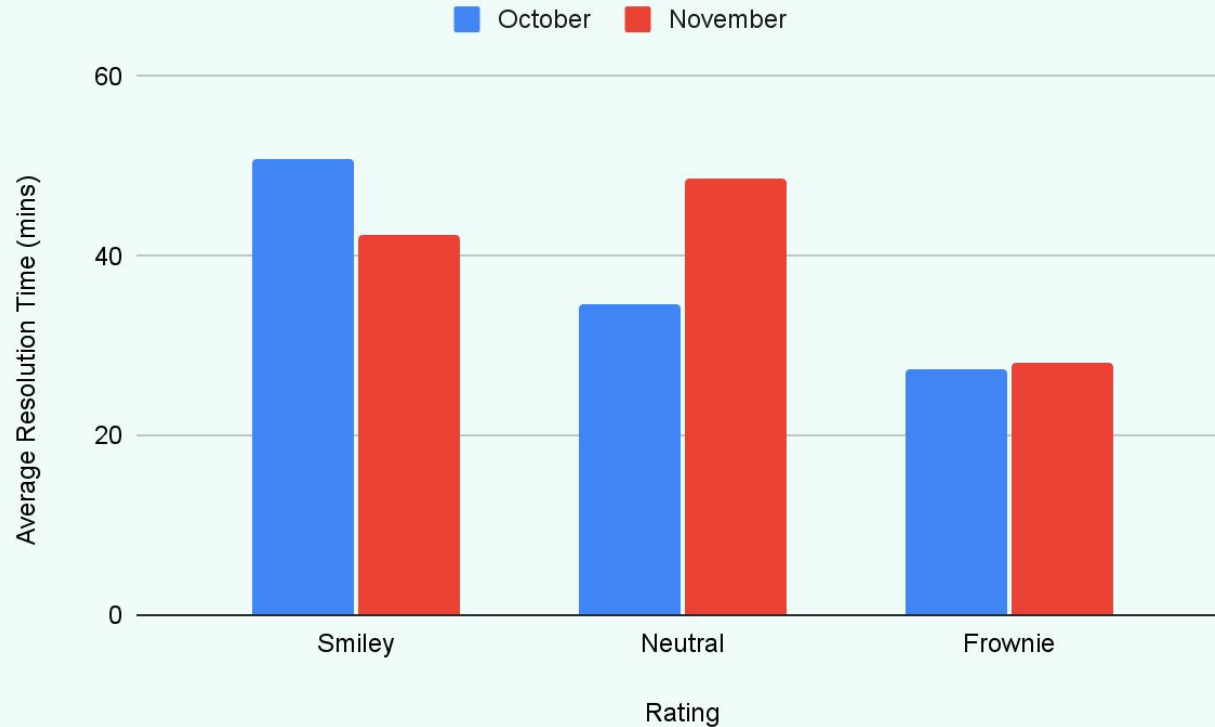
10

Frownies

Ticket ID	Date	Merchant Issue (Official Category)	Merchant Issue (Detailed)	Resolution	Resolution Time	Chat/Email	Shopify Plan	Merchant Location	Rating	Acknowledge	Ask	Align	Assure	After	Resolution Method
<a href="#">43023797</a>	Nov 1, 2023	Shopify Email App	Issue with sender email and address in Shopify Email	Guided the merchant through the process of changing sender email and removing address	20 minutes	Chat	Basic	London	Smiley	Yes	Yes	Yes	Yes	Yes	Resolved during interaction
<a href="#">43062420</a>	Nov 2, 2023	Orders	Issue with a customer trying to pay in USD for an order to be shipped to Romania	Guided the merchant through the process of changing the market for the order	18 minutes	Chat	Shopify	New York	Smiley	Yes	Yes	Yes	Yes	Yes	Resolved during interaction
<a href="#">43023655</a>	Nov 1, 2023	Buy Button	Issue with linking products to personal website and setting up payment methods	Guided the merchant through the process of adding products to their website and setting up payment methods	74 minutes	Chat	Basic	New York	Smiley	Yes	Yes	Yes	Yes	Yes	Resolved during interaction
<a href="#">43061031</a>	Nov 4, 2023	Domains	Issue with purchasing a domain due to incorrect personal identity number	Guided the merchant through the process of purchasing the domain correctly, escalated for refund of previous charges	72 minutes	Chat	Basic	Sweden	Smiley	Yes	Yes	Yes	Yes	Yes	Escalated

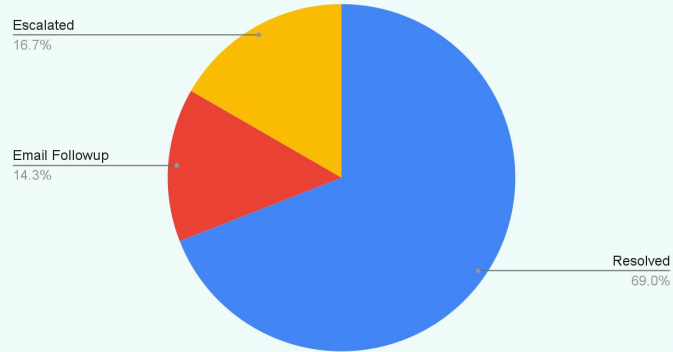
[Access the full spreadsheet here](#)

# Average Resolution Time by Chat Rating

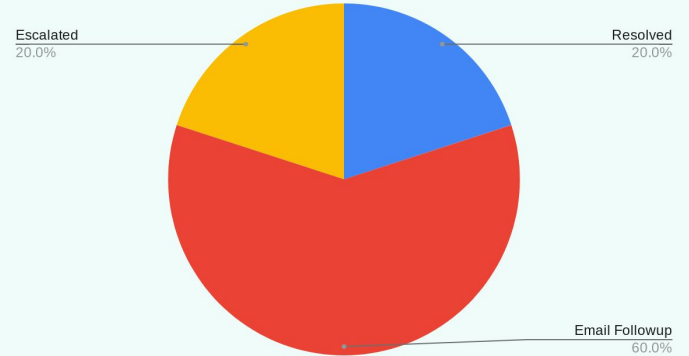


# Chat Rating and Resolution Method

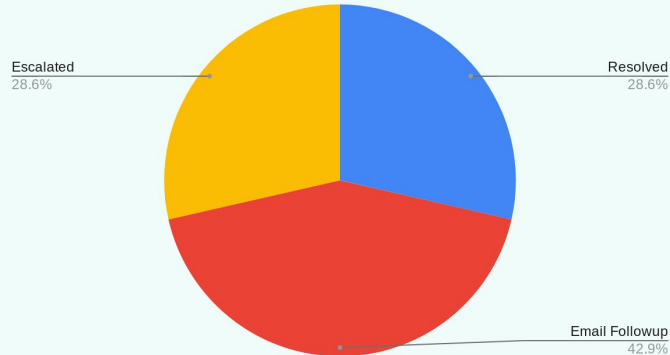
Smiley Ratings



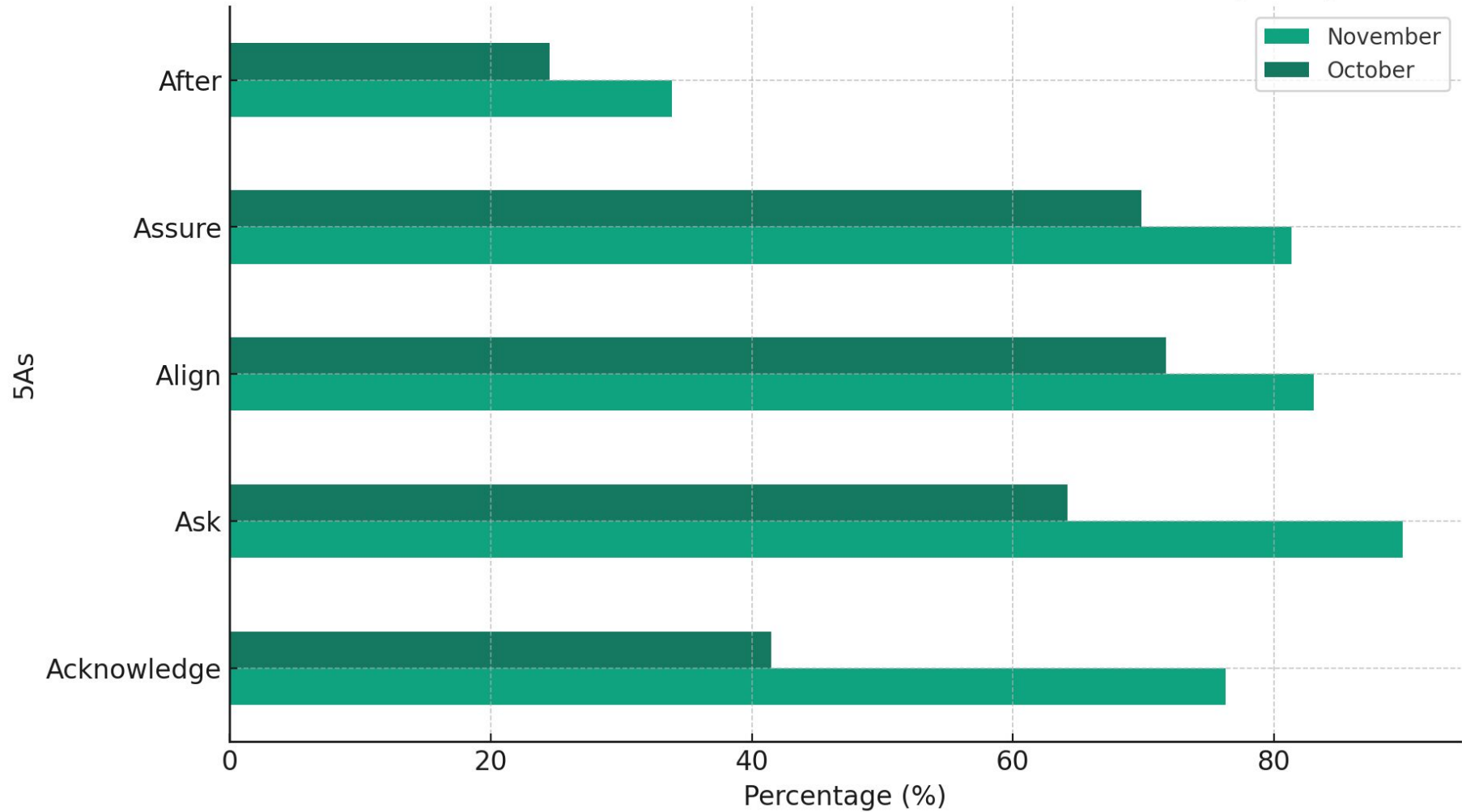
Frownie Ratings



Neutral Ratings



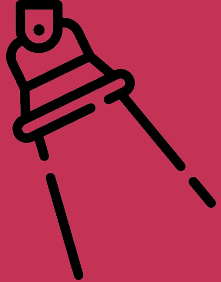
Adherence to the 5As for October and November (in %)





## The Most Time Consuming Issues

Issue Category	Average Resolution Time (Minutes)	Average 5A Adherence
Discounts	65.0	0.65
Online Checkout	48.3	0.80
Third Party Theme	47.7	0.53
Account Login	38.3	0.60
Third Party Apps	37.2	0.84
Domains	36.6	0.88
Orders	34.3	0.73



# Spotlight on Advisor Excellence

Case Study on  
5A Usage



# Denise and Tai demonstrate **Acknowledge**

## Example

- Denise: No such thing is a stupid question! That's great. Is it to your Christmas header?
- Tai: I can sure look into that, Greg! So, you have the Shopify (monthly) plan, right. You'd like to know how many iPad POS systems you can have attached to your store, and also if you can scan stock into inventory, right?

## Why this works

- Validates the merchant's effort and encourages open communication. Follow up question shows active listening and an understanding of the situation
- Repeating the question back to merchant + plus any additional info not only ensures both parties are on the same page but also makes the merchant feel heard and valued

# Eloho and Sharon demonstrate **Ask**

## Example

- Eloho: When was the first time you noticed this and have you made any recent changes to your account?
- Sharon: I see you just started your store, **are you looking into the best options right now for you concerning shipping?**

## Why this works

- Helps trace the history of the issue and makes the merchant feel like they are an active participant of the solution process
- Attention to detail allows us to consider the broader context of the merchant's situation

# Colt and Ahmad demonstrate **Align**

## Example

- Colt: With manual payment methods, it sticks to the currency assigned as the store currency with no way to change it... I can pass along feedback on this, because personally I would like to see this option implemented
- Ahmad: I **totally understand that**. I would not want to pay for a whole year that I would not be using either

## Why this works

- Shares the merchant's perspective, understands their need for more flexible options, and actively advocating for improvements that could make their experience better
- Validates merchant's concerns by putting himself in their shoes. Allows for more productive and less-heated dialogue

# Nathan and Ellyn demonstrate **Assure**

## Example

- Nathan: I understand the importance of this and will do my best to assist you today! Let me try to replicate the checkout process
- Ellyn: Trust me this is not always super straightforward so it's great that you reached out to confirm! And you did an absolutely amazing job on your end adding this to the store. Everything looks great :)

## Why this works

- Starts with **alignment** then immediately gives merchant confidence that steps are being taken to resolve the issue
- Acknowledges the complexity of the task which normalizes the difficulty for the merchant. Helps merchant feel more confident about their effort and the support they are receiving

# Daniel and Lauren demonstrate **After**

## Example

- Daniel: You are welcome, Kirk. I will flush the front end cache from my end. Would you be able to get someone to assist you with the theme edit?... You can also hire a Shopify expert...
- Lauren: Awesome! Great to hear Faiq! **So we have successfully got your store switched over from USD to PKR.** Is there anything else I can help you with today?

## Why this works

- Main issue addressed, being proactive to avoid future issues, and provides resources to handle future challenges
- Ensures merchant is satisfied by the outcome and leads into MRA

Goodbye

