

Chat standard operating procedures

<h2>GUIDE.DETAILED\_INFORMATION</h2>  
[https://cskb.qa.ebay.com/cskbapp/art?page\\_content&id=GUIDE1651&ViewLocale=en\\_US#all\\_lobs](https://cskb.qa.ebay.com/cskbapp/art?page_content&id=GUIDE1651&ViewLocale=en_US#all_lobs)>SOP for all LOBs except concierge</a>  
[https://cskb.qa.ebay.com/cskbapp/art?page\\_content&id=GUIDE1651&ViewLocale=en\\_US#conciergesop](https://cskb.qa.ebay.com/cskbapp/art?page_content&id=GUIDE1651&ViewLocale=en_US#conciergesop)>SOP for concierge</a>  
[https://cskb.qa.ebay.com/cskbapp/art?page\\_content&id=GUIDE1651&ViewLocale=en\\_US#bestpractices](https://cskb.qa.ebay.com/cskbapp/art?page_content&id=GUIDE1651&ViewLocale=en_US#bestpractices)>General Concurrent Chat best practices</a> Internal Information<a name="all\_lobs"></a> <h3>All LOBs except concierge (for concierge SOPs, <a href="https://cskb.qa.ebay.com/cskbapp/art?page\_content&id=GUIDE1651&ViewLocale=en\_US#conciergesop">click here</a>)</h3> <table border="1" cellpadding="2" cellspacing="0"> <tbody> <tr bgcolor="c2dfff"> <td width="20%"> <h3>SOP</h3> </td> <td> <h3>Details</h3> </td> </tr> <tr> <td valign="top"> <h3>Timeframes</h3> </td> <td><a href="https://cskb.qa.ebay.com/cskbapp/art?page=content&id=GUIDE1731#SRClosure" target="\_blank">Service Request closure fundamental service policy</a></td> </tr> <tr> <td valign="top"> <h3>SR sub status</h3> </td> <td><a href="https://cskb.qa.ebay.com/cskbapp/art?page=content&id=GUIDE1731#SRClosure" target="\_blank">Service Request closure fundamental service policy</a></td> </tr> <tr> <td valign="top"> <h3>Chat best practice&nbsp;</h3> </td> <td>Welcome: <ul> <li><a href="https://cskb.qa.ebay.com/cskbapp/art?page=content&id=GUIDE1659#greeting" target="\_blank">Greet the member</a></li> <li>Verify the member, if they are not verified already&nbsp;</li> <li>Read the member's contact reason</li> <li>Review&nbsp;previous teammate notes </li> <li>Acknowledge the customer's concern and empathize</li> </ul> </td> </tr> </tbody> </table> During the full chat interaction:

<ul> <li>Reply as soon as the customer posts a message</li> <li>Keep responses simple, clear and concise</li> <li>If you need time away for investigation or consulting with an SME/Coach/TL - make sure to come back to the member every 2 mins so they don't feel forgotten about</li> <li>Always double check your spelling and grammar</li></ul> <li>Tip: Use the communicator spell checker</li></ul> </li></ul><li>Avoid copying and pasting full item titles</li></ul> <li>Summarize when possible</li> </ul> </li></ul><li>Adapt your communication to match the member's experience level</li> </ul> Multiple responses: <ul> <li>Never send more than 2 sentences in each message</li> <li>If a customer responds in between your messages</li> <li>Acknowledge their question or comment and go back to your original message</li> </ul> </li></ul><li>If customer asks a question different to the necessary information you're trying to provide: <ul> <li>Politely ask if they would mind if you continue with your first resolution</li> <li>Come back to their new query afterwards</li></ul> </li></ul><li>Investigation: <ul> <li>Investigate the member's concern using tools and the CSKB</li> <li>Bring the member on the journey tell them what you are doing</li> <li>Look for what can be done rather than what can't be done</li></ul> Resolution: <ul> <li>Clearly state the resolution</li> <li>Your reply should be clear and concise</li> <li>Provide the most appropriate resolution. If there is more than one appropriate resolution for the case, allow the customer to make an informed decision by outlining their options</li> <li>After stating one option, wait for member's confirmation before you move to the next option</li> <li>Confirm any next steps the customer needs to take</li> </ul> Demonstrate ownership (if applicable): <ul> <li>"I've taken action or I'll personally contact you"</li></ul> Add value: <ul> <li>Check the member's account for anything that could improve their experience on eBay</li> <li>Tip: check their seller dashboard and see if you can offer any tips</li></ul> Closing: <ul> <li>Never ask

is "there anything else I can help you with?" or similar</li> </li></li>If the member has signaled their goodbye and the issue has been resolved, wrap up the chat </li></li></li>Thank the member for contacting eBay</li> </ul> </td> </tr></tr> <td valign="top"> <h3><a name="holdSOP"></a>Hold SOP</h3></td> <td> <table border="1" cellpadding="1" cellspacing="1"> <tbody> <tr bgcolor="c2dfff"> <td>Hold reason</td> <td>SOP</td> </tr> <tr> <td>1. You need to research member's query</td> <td><ul> <li>Ask the member if it is ok to put them on hold. </li> <li>Provide member with a wait time</li> <li>Ensure you come back at 2 minutes</li> </ul> <li>Come back at the promised time  </li> <li>Tip: Use Communicator's stopwatch feature to keep track of time</li> </ul> </li> <li>Thank the member for waiting</li> <li>If you need additional time, thank the member for their patience and explain you need more time </li> <li>Tip:If resolution is going to take longer, offer a callback or email when you have an update</li> </ul> </li> </ul> </td> <td>2. Member asks us to wait (customer is looking for their credit card, checking their paypal account, answering the door etc.)</td> <td><ul> <li>Agree to the hold</li> <li>If the hold reaches the check in time, you should ask: <em>Hi (name), just checking you're with me?</em></li> </ul> </li> <li><em>If there is no member response after the maximum time, explain that we have to disconnect</em> </li> <li><em>Im afraid I wont be able to wait any longer as our lines are busy at the moment</em> </li> <li><em>Please feel free to contact us again when you have the relevant information</em></li> </ul> </li> </ul> </td> </tr> </tbody> </table> </td> </tr> </tr> <td valign="top"> <h3>Unresponsive customer (idle time)</h3> </td> <td> Follow the procedures found in the <a href="https://cskb.qa.ebay.com/csKBapp/art?page=content&id=GUIDE1731#SRClosure"

target="\_blank"&gt;Service Request closure fundamental service policy&lt;/a&gt;. &nbsp; &lt;/td&gt;  
&lt;/tr&gt; &lt;tr&gt; &lt;td valign="top"&gt; &lt;h3&gt;Timer process in communicator&lt;/h3&gt;  
&lt;/td&gt; &lt;td&gt; Communicator shows how long a customer has been idle by the counter at the  
bottom of your chat window: &lt;img alt=""  
src="https://cskb.qa.ebay.com/library/EBAY/Images/UK/GUIDE/1651/idletime\_1.png"&gt; &lt;ul&gt;  
&lt;li&gt;The timer will automatically reset each time the member responds to you &lt;ul&gt;  
&lt;li&gt;These timers will &lt;em&gt;only&lt;/em&gt; reset if the customer responds&lt;/li&gt;  
&lt;/ul&gt; &lt;/li&gt; &lt;li&gt;After sending your first prompt to the customer at 01:00 of them being  
idle, you will receive a notification at 01:50 if they are still idle &lt;ul&gt; &lt;li&gt;This should alert you  
to end the chat with your second prompt:&nbsp;&lt;/li&gt; &lt;/ul&gt; &lt;/li&gt; &lt;/ul&gt; &lt;img  
alt="" src="https://cskb.qa.ebay.com/library/EBAY/Images/UK/GUIDE/1651/idletime\_2.png"&gt;  
&lt;/td&gt; &lt;/tr&gt; &lt;tr&gt; &lt;td valign="top"&gt; &lt;h3&gt;Member requests a phone  
call&lt;/h3&gt; &lt;/td&gt; &lt;td&gt;Use the following talking points to acknowledge the members  
request: &lt;ul&gt; &lt;li&gt;We want you to get the help you need as quickly as possible&lt;/li&gt;  
&lt;li&gt;Depending on your issue, we offer email, chat, or phone support for that topic &lt;ul&gt;  
&lt;li&gt;Our phone support doesn't&nbsp;handle as many topics as email or chat&lt;/li&gt; &lt;/ul&gt;  
&lt;/li&gt; &lt;li&gt;I'd be happy to help you find the answer to your question&lt;/li&gt; &lt;li&gt;If you  
want to go back into Contact us and see if phone support is an option: &lt;ol&gt;  
&lt;li&gt;Select&nbsp;Help &amp; Contact&nbsp;at the top of most eBay pages.&lt;/li&gt;  
&lt;li&gt;Select the Contact us&nbsp;button on the right side of the page. &lt;ul&gt; &lt;li&gt;You may  
need to sign in&lt;/li&gt; &lt;/ul&gt; &lt;/li&gt; &lt;li&gt;Select a topic from one of the drop-down  
menus at the top of the page.&lt;/li&gt; &lt;li&gt;Choose from the contact options offered on the right  
side of the page.&lt;/li&gt; &lt;/ol&gt; &lt;/li&gt; &lt;/ul&gt; &lt;/td&gt; &lt;/tr&gt; &lt;tr&gt; &lt;td  
valign="top"&gt; &lt;h3&gt;Ending a chat&nbsp;&lt;/h3&gt; &lt;/td&gt; &lt;td&gt; &lt;ol&gt;  
&lt;li&gt;Thank the member and say good-bye&lt;/li&gt; &lt;li&gt;Disconnect the chat immediately  
after sending your closure message&nbsp;&lt;/li&gt; &lt;/ol&gt; &lt;/td&gt; &lt;/tr&gt; &lt;tr&gt; &lt;td

valign="top"> <h3>Transfers</h3> </td> <td> <ol> <li>Explain to the member you will need to transfer them</li> <li>Gain the member's approval for the transfer</li> <li>Check the SR Classification section of Communicator to see how long the queue is for that team</li> <li>Inform the member of the wait time</li> <li>Re-classify the SR to the appropriate topic</li> <li>Explain to the member you're completing the transfer</li> </ol> Member refuses to be transferred: <ol> <li>Explain that you can transfer the query offline instead</li> <li>A member of the other team will come back to them via email within 48 hours</li> <li>Reiterate that you are not trained to handle this specific topic</li> </ol> Transfer option is greyed out (the team does not have chat&nbsp;or it is outside the hours of operation): <ol> <li>Explain to the member you will transfer the query offline</li> <li>The other dept. will respond to the member by email within 48 hours</li> <li>Create an offline SR, classify it to match members topic of discussion, add SR notes, and send</li> </ol> </td> </tr> </tbody> </table> <a name="conciergesop"></a>&nbsp; <h3>Concierge SOPs (for all other LOBs&nbsp;<a href="https://cskb.qa.ebay.com/cskbapp/art?page\_content&id=GUIDE1651&ViewLocale=en\_US#all\_lobs">click here</a>)</h3> <table border="1" cellpadding="2" cellspacing="0"> <tbody> <tr bgcolor="c2dfff"> <td width="20%"> <h3>SOP - concierge</h3> </td> <td> <h3>Details</h3> </td> </tr> <tr> <td valign="top"> <h3>SR sub status</h3> </td> <td> <table border="1" cellpadding="1" cellspacing="1"> <tbody> <tr bgcolor="c2dfff"> <td>Regions</td> <td>Scenario</td> <td>Chat status</td> </tr> <tr> <td rowspan="6">US, UK, AU, DE</td> <td>Customer has to follow up about a previous contact</td> <td>Resolved</td> </tr> <tr> <td>Customer is abusive and has been warned an appropriate number of times</td> <td></td> </tr> <tr> <td>Disconnect</td> <td></td> <td></td> </tr> <tr> <td></td> <td>Customer disconnects&nbsp;/</td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> </tr> </tbody> </table> </td> </tr> </tbody> </table>

unresponsive customer (idle time) disconnect	and no concern was stated
Disconnect	
Customer disconnects / unresponsive customer(idle time) disconnect	and the teammate gave resolution before the disconnection
Resolved	
Unsuccessful transfer from another department where no concern was stated	
Disconnect	
Customer doesn't speak the same language as the teammate	
Send to offline	

### Chat basics

1. Once the chat comes through, always provide a Concierge-welcome introduction
  - e.g. Hi Dave, welcome to eBay Concierge, I will gladly assist you today
2. Ensure you have read the member's contact reason snippet
  - This will provide you the insight to start your review
  - We should acknowledge, empathize and reassure around this piece of info
3. Always double check your spelling, grammar and structure to make sure its correct
  - This is to ensure a professional look and to prevent any mistakes
  - Use the communicator spell checker
  - Quickly read over your replies to make sure they read right
4. Do not info-overload on your responses
  - Remember, we have 2 minutes to respond, so your reply should be simple, clear and concise
  - Never send more than two sentences in each message sent to the member
  - There should be no delay between messages sent, to ensure full information given
5. Always note in the chat what you are working and why, as to keep the member fully informed. Bring the member on the journey
  - If member responds in between messages sent by you:
    - Acknowledge this and then go back to your original message if necessary
  - If member asks a question different to the necessary information you are trying to provide:
    - Politely ask the member if they would mind you continuing with your information/education
    - Come back to their new query afterwards

6. If the member has signaled their goodbyes AND the issue has been resolved, please look to wrap up the chat

Some members leave the chat unattended and mistakenly leave it open

7. It is no longer a requirement to leave SR notes after a Chat.

A copy of the chat transcript will be available in the Recent SR tab if needed.

Should I call?	Yes if any of these scenarios is true:
<ul style="list-style-type: none"> <li>The query is tricky or requires multiple responses</li> <li>The member contacted us multiple times about the same issue</li> <li>Certain language displayed within the chat such as: heightened speech, excessive punctuation (multiple exclamation marks etc.), certain emotions (anger, disappointment etc.)</li> </ul>	<ul style="list-style-type: none"> <li>A phone call will provide a greater experience in these scenarios</li> <li>If a call has been agreed, close the current chat, pause it and re-open as an email to make the call</li> <li>Offer the option to call member and follow the ownership process until a solution is provided</li> <li>Look to utilize the option to take the query offline and arrange a call-back if you feel the query may need a detailed investigation</li> <li>Make sure you have all the info to perform this and set a time for the follow up</li> </ul>
Unresponsive customer	Follow the procedures found in the

<https://cskb.qa.ebay.com/csKBapp/art?page=content&id=GUIDE1731#SRClosure>

Service Request closure fundamental service policy.

Contact expectations

Respond as soon as you receive a response from the member

Provide a simple solution to the member with as much helpful content as possible i.e. easy to follow steps

Acknowledgement: understand the customer's perspective and respond, empathize and reassure

e.g. Very sorry to hear you have received a broken item, we will certainly look to resolve this for you

<p> <ul style="list-style-type: none"> <li>Adapt to customer</li> <li>Communication style to reflect in email response (look to match the member where appropriate)</li> <li>Personalization of chat replies i.e. pick up and mirror information provided by the member to incorporate into your response</li> <li>Avoid too much or too little education</li> <li>Keep the focus on being helpful and encouraging, rather than what went wrong or who is to blame</li> <li>Look for what can be done rather than what cant be done</li> <li>BE POSITIVE, BE EMPOWERED AND DO THE RIGHT THING</li> <li>When reviewing the members issue: <ul style="list-style-type: none"> <li>Keep an eye out for any opportunities along the way, which may be of benefit to the buyer in helping for future transactions or increasing their spend on the site</li> <li>e.g. buying from eTRS sellers to prevent poor experiences, recommending the Daily Deals Newsletter...</li> </ul> </li> </ul> </p>	<h3>Member's communication styles</h3> <p> <ul style="list-style-type: none"> <li>Analytical/results oriented: <ul style="list-style-type: none"> <li>Customer may be precise and direct</li> <li>Adapt by sticking to the facts and demonstrate results</li> </ul> </li> <li>Expressive/empathy oriented: <ul style="list-style-type: none"> <li>Customer can display behaviour that is more emotional</li> <li>Adapt by focusing on the relationship AND facts</li> <li>Be energetic, to the point and provide recognition and reassurance</li> </ul> </li> <li>Process oriented: <ul style="list-style-type: none"> <li>Customer is driven</li> <li>They want to be the best, so adapt by taking the time to explain the why and how</li> <li>Use timelines and provide options</li> </ul> </li> <li>Social oriented: <ul style="list-style-type: none"> <li>Customer is friendly and may use exclamations, caps and smiley faces</li> <li>They value relationships, so adapt by being more conversational</li> <li>Also, feel free to discuss more personal issues (interests, family, etc.), but dont digress too much</li> </ul> </li> </ul> </p>
<h3>Follow up calls from chats</h3>	<p>For chat only teammates, only</p>



use follow up if we cannot achieve first contact resolution. Take ownership of the follow up unless another department is resolving the customer's concern.

- Begin follow-up process during contact or ACW
- With interaction loaded in Communicator click the alarm icon
- Select a communication channel icon for follow-up
  - Phone Icon: Phone channel
  - Email Icon: Email channel
- Select an ownership drop down option
  - Any Teammate: Follow-up will be served to any available teammate with correct skillset
  - Priority for me: Follow-up will be served to yourself in the 30 min window selected, if available
  - Otherwise will go to next available teammate with correct skillset
  - Only me: Follow-up will be served to yourself in the 30 min window selected, if available
  - Otherwise system will update follow-up to +24hrs to be served again for up to X amount of days, after which will be served to any teammate (with correct skillset)

Conferencing expert chat

If the members query requires action or advice from an expert group, use the chat conference option.

- Let them know that you are reaching out to an expert to get the issue resolved
- If the wait time for the expert chat is more than 2 minutes:
  - Advise the member that you can take ownership of the issue and contact them back with an update at an agreed time
  - Call member back to advise of the outcome and take further ownership if needed
  - If no ownership is needed close SR as resolved
- Once you are through to expert chat, use the template (see below) to provide sufficient info to the expert teammate
- Once the issue has been resolved by the expert teammate, close out conference to free the expert for next chat/call
- Expert teammates conferenced in
  - Be available for chats and prepared to reply to chats as soon as they come in
  - Remember that the teammate is on the other side keep them clued in and update them every 2 minutes
  - Use

templates that the teammates on the other side can copy and paste into their chat to save time

- Offer to call the member back if the issue is complex or if it will take more than 5 minutes to explain to our colleagues over chat

Once a solution is provided, wrap up the chat as quickly as possible as to be available for next contact.

General concurrent chat best practices
Single monitor setups

- If you have found a setup that works for you already, way to go!
- We have included a couple of visuals at the end which show suggestions to help your flow
- Using Alt+Tab can help to switch between apps quickly
- Automatic greetings
- Set up the automatic greeting in Communicator so it greets the member and asks the customer a question right away
- This gives you a little bit of time to wait for their response if you are trying to get the responses timed just right
- Keeping information separate
- Load the accounts immediately if they are not automatically loaded in AD
- Consider keeping information for each member in separate browsers, tabs, or windows
- This makes it easier to recall which information pertains to each chat window
- Staying calm
- Handling two customers at a time can get stressful
- Remember to take a second to breathe if you get overwhelmed
- It is perfectly normal to take a second to compose, just like we would on a difficult phone call
- 2-minute response time
- Try setting a timer either on your smartphone or by using a physical timer
- This will get you into the rhythm of answering within two minutes
- Check in
- Maintain a healthy two-minute check in with each customer
- Even if its just to say youre still busy researching
- A snippet can be used to check in, too
- Resolve disconnected chats
- Its easy to forget about a chat that has ended when youre working with the other customer
- Remember to resolve chats where the member

has disconnected so we can be available for our customers <ul> <li>This helps reduce negative impacts to our scorecards in ACW (After Chat Work, in this instance).</li> </ul> </li> </ul> Snippets Use the snippets found in the search box on the right of the chat window or in the KB to save time responding to members or checking in.

</h2><h2>GUIDE.SUMMARY What <ul> <li>Chat best practices, holds, transfers&nbsp;and&nbsp;disconnections SOPs,&nbsp;including additional concierge SOPs</li> </ul> </h2><h2>GUIDE.RELATED\_LINKS Related CSKB articles <ul>

<li><a href="https://cskb.vip.ebay.com/cskbapp/art?page=content&id=guide1487"

target="\_blank">Escalation and customer experience guidelines</a></li> <li><a href="https://cskb.vip.ebay.com/cskbapp/art?page=content&id=SOL11063"

target="\_blank">US chat snippets repository</a></li> <li><a href="https://cskb.vip.ebay.com/cskbapp/art?page=content&id=guide1659"

target="\_blank">US chat standards</a></li> </ul> </h2>