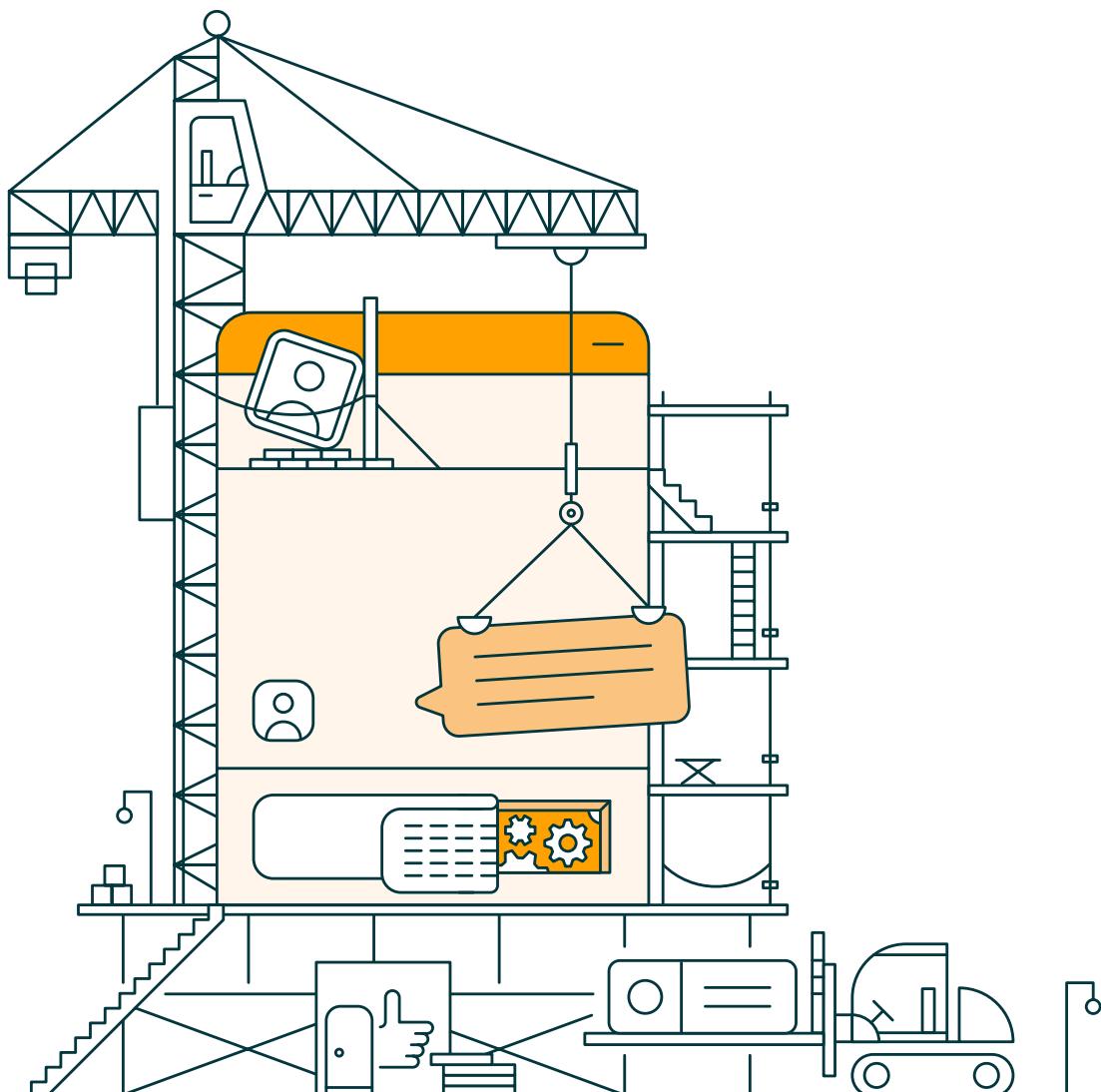




6 steps to deploying Zendesk Chat on your website

ZENDESK CHAT IMPLEMENTATION GUIDE 2016



Contents

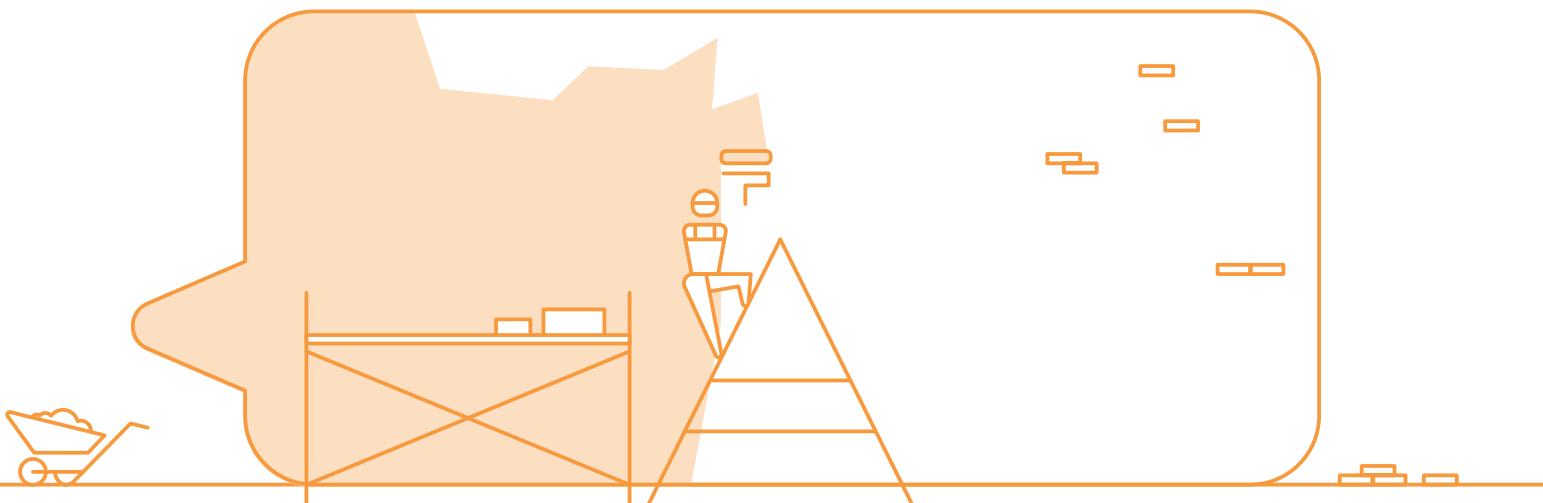
03	<u>Introduction</u>
04	<u>Align chat goals with business objectives</u>
14	<u>Managing customer experience and chat volume</u>
22	<u>Determine your staffing requirements</u>
28	<u>Train your agents</u>
32	<u>Build a chat workflow</u>
42	<u>Monitor success metrics and improve chat deployment</u>
46	<u>Bonus: using Zendesk Chat on multiple websites</u>
49	<u>Summary</u>

Introduction

Live Chat is a faster and more personal way to engage your customers. With the [highest satisfaction score amongst all channels](#), Live Chat is essential to offering a complete support experience to customers.

The Zendesk Chat Implementation Guide is intended to help support managers and administrators deploy Live Chat on their website. It brings together our collective live chat knowledge and experience into one comprehensive resource, offering high level guidance, as well as best practice tips for every aspect of chat.

Effectively, planning out your chat deployment can help channel more interactions into chat, reduce operating costs, increase customer satisfaction, boost agent productivity, and make an impact on sales conversions.



STEP ONE

Align chat goals with business objectives

Define business objectives

As the support manager, you may have your own set of success metrics, but these should be closely aligned with the overall company goals. Hence, the initial step of deploying Chat is to consider its business objectives.

Different stakeholders will have their own ideas for chat: support may want to improve the customer experience, while sales may want to see an increase in conversions. Consider who the stakeholders are when developing your chat goals so the benefits extend from your team, to the whole company, and on to your customers. Here are five ways chat can impact your business:

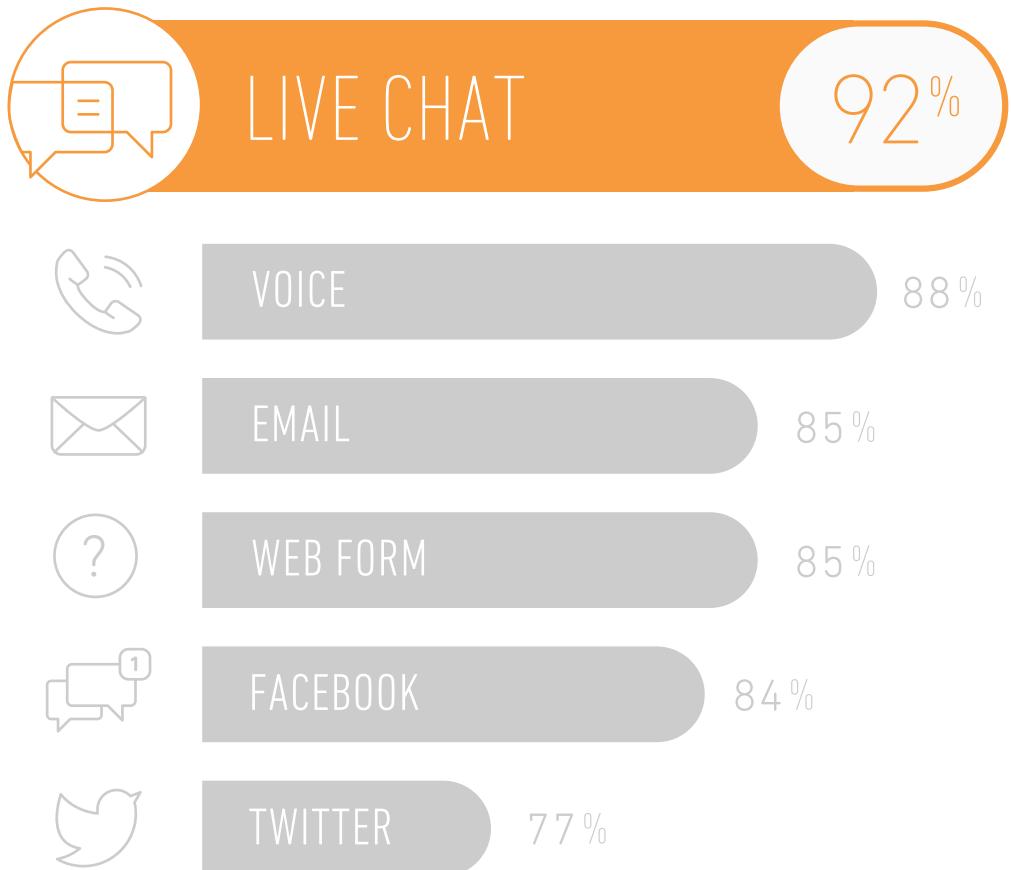
Improving customer satisfaction (CSAT)

Chat aligns with the growing preference for messaging and satisfies customers' desire to get immediate answers without having to jump through hoops. It provides the personal attention, convenience, and speed that customers love. Chat [typically offers the fastest resolution rates](#) beating all other channels, [especially email](#). Since [customers hate waiting for support](#), chat has become the channel of choice for organizations wanting to improve their CSAT.

The initial step of deploying chat is to consider its business objectives.

Step 1 | Align chat goals with business objectives

According to [Zendesk's Benchmark report](#), Live Chat has the highest satisfaction rates amongst all channels.

**Increasing sales and revenue**

Customers are [3 times more likely to make a purchase when you reach out with a chat](#). Answering questions about products or the purchase process can provide customers the confidence they need to complete an order.



Kixeye, a California-based developer of online strategy and combat games with over 5 million monthly active users, saw a

30%

increase in CSAT

and lower ticket volumes
after deploying chat.

“

Zendesk lets us be there in the customer's moment of truth. That is the all-important moment when a customer opens up and says something that can make or break a tote selection.

Aubrie Rice, Customer Development Manager

LE TOTE

For example, Le Tote, an apparel and accessory rental service, uses an [automated Trigger](#) to offer help to customers who are lingering on the checkout page. By proactively engaging customers during the buying process, Le Tote is able to reduce cart abandonment and increase conversions.



[One Way SMS](#), a mobile communications company, saw an increase of 30% in their total revenue, after deploying Zendesk Chat. Further, upon adding an additional agent, their revenues rose by another 8%.

Step 1 | Align chat goals with business objectives**Reducing support costs**

Chat is one of the most efficient support channels as agents can handle multiple conversations at once, something that's not possible via phone. Increased efficiency and agent productivity mean a lower cost per contact for your organization.



For example, Zendesk Chat has [helped Miinto reduce call volume by 40%](#). Furthermore,

this fashion network's live chat team has become more efficient thanks to [Chat shortcuts](#). They can now respond to frequently asked questions at the click of a button.

Zendesk Chat has also proven critical during Miinto's mid-season sale, known as "Shopping Spree". The team extended their operating hours for chat during the sale and, according to Eveline Poetsema, Operations Manager at Miinto, "[they] actually employed less staff to answer customers' questions."

Zendesk Chat has made Miinto's agents more productive and this has saved them the equivalent of a third of a full-time employee.

Step 1 | Align chat goals with business objectives

“

For a small company, growth is a priority and this is where chat plays a major role. With Zendesk Chat, Datanyze can quickly identify customers interested in buying and nudge them towards a sale.

Jon Hearty, COO of Datanyze

Datanyze ~

Lowering cart abandonment

55% of shopping carts are abandoned by online customers. By providing your customers with assistance or proactively offering them support, chat can help mitigate cart abandonment and close more sales.

Improving response rates

Seconds matter when it comes to customer support and chat allows for quick, real-time answers. Faster response and resolution times mean higher agent productivity, reduced costs, and, as mentioned above, higher CSAT.

“

After switching to live chat,
we are able to process and
solve customer requests
10 times faster.

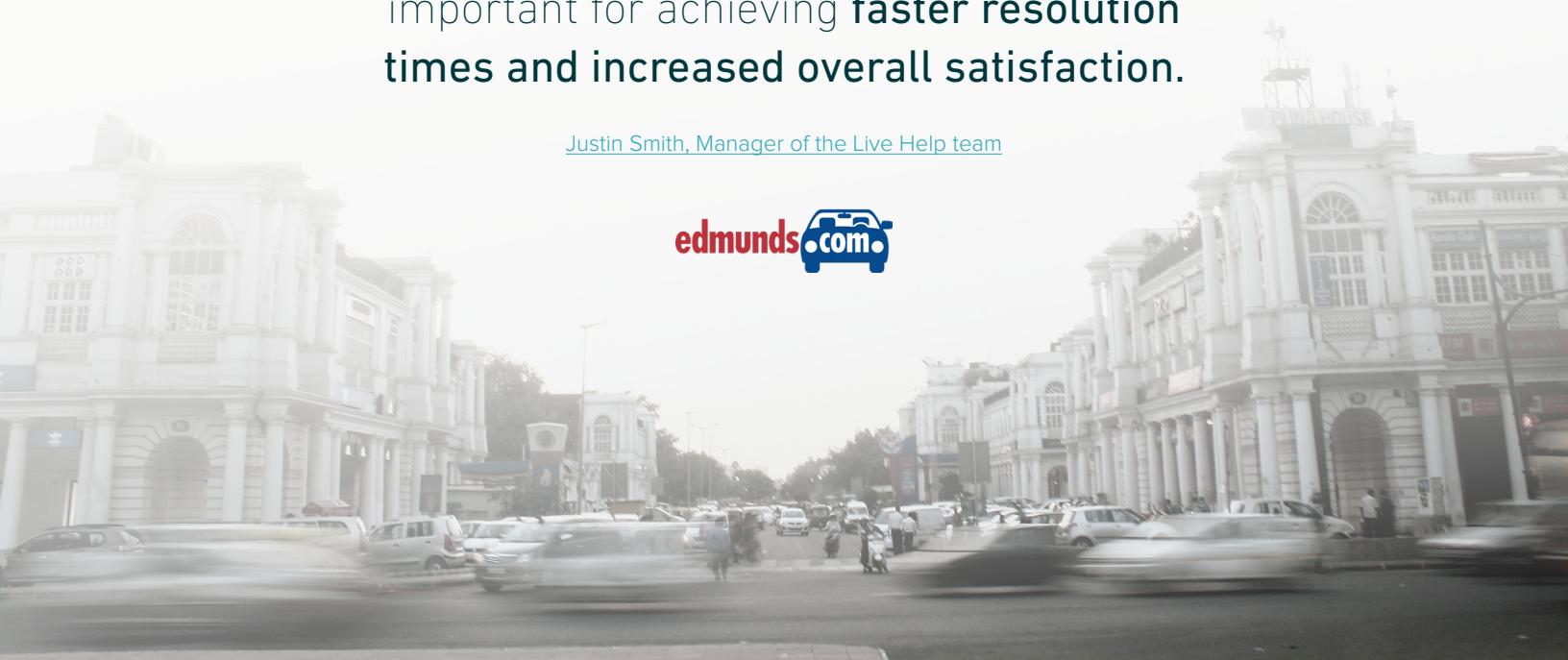
Dmitry Odintsov,
Director of Sales and Business Development



“

The ability to transfer chats between Live Help Specialists, or over to the customer experience team, has also been important for achieving **faster resolution times and increased overall satisfaction.**

Justin Smith, Manager of the Live Help team



Step 1 | Align chat goals with business objectives

Select success metrics

Depending on which business objectives you settle on, you can choose a set of metrics to measure your success with chat. Ideally, you want to pick metrics that are relevant to your business objectives. Here are four metrics to consider:

Chat rating



Rate this chat

Zendesk's [Chat Rating](#) feature lets customers rate a chat (positively or negatively) and leave comments. The Chat Rating can then be used to monitor the overall CSAT of your support operation and drill down into the performance of individual agents. You can also use Analytics to measure the effect of various chat factors (e.g., wait times, response rate, and chat duration) on the overall CSAT.

Average wait time

The [average wait time](#) is the length of time it takes for an agent to start serving a customer. This is important as it indicates how long, on average, your customers are waiting to be served. The lower the response time, the more likely your customers will be satisfied with their experience. This metric is also a good gauge for monitoring and reducing support costs and improving response rates.

Step 1 | Align chat goals with business objectives

Average chat duration

If your goal is to reduce the overall support cost, then keep a close eye on the [average chat duration](#) of your agents. This lets you see how long your agents take to serve an average chat. Bear in mind that agents will frequently handle more than one chat at a time so the actual average chat duration will usually be a bit lower than the recorded number. Also, be wary of driving this number down as it might adversely affect your CSAT.

Agents logged in and serving

The two complementary metrics—[agents logged in and agents serving](#)—give you insight into how many agents were available and for how long they were serving. This is useful to track shifts as well as plan future schedules. You can also use this to minimize agent overlap and keep costs down.

By aligning the goals of using chat with your overall business objectives, the relevant stakeholders will quickly see the value of chat and its impact on the bottom line.

By aligning the goals of using chat with your overall business objectives, the relevant stakeholders will quickly see the value of chat and its impact on the bottom line.

Step 1 | Align chat goals with business objectives**Additional considerations**

As you develop your business objectives and select metrics to measure the success of your chat deployment, consider the following:

1. What is your current support infrastructure like?
Are your customers happy with it?

2. Why do you want to add chat?

3. What is your budget?

4. How do you foresee chat impacting your bottom line?

5. How do you currently increase sales conversions?
How do you anticipate chat improving this process?

STEP TWO

Manage customer experience and chat volume

Once you have your key success metrics on hand, it's time to think about the customers' experience.

Optimize the user experience by managing where, when, and how to make chat is available on your website. Not only will this affect your CSAT, it can also impact your chat volume. The average web page will get between 5 and 15 chats for every 100 visitors.

But, this number can be influenced by a variety of factors, including:

- A. The location of the chat widget ([Chat Location](#)),
- B. The number of people who have access to it ([Chat Access](#))
- C. The length of time it is available ([Chat Timing](#)), and
- D. Whether chat is proactive or reactive ([Chat Interaction](#))



Chat location

Generally speaking, the location of the chat widget should align with your chat goals:

- For most retailers, sales conversion happens on the checkout page. So, if you want to increase conversion and reduce cart abandonment then you should add the widget here.
- If you have a mobile gaming app and CSAT is important, then consider putting chat inside your app using the [Mobile Chat SDK](#).
- Similarly, for SaaS companies, customers normally make their purchase decision based on their in-product trial experience so it's definitely wise to offer chat support for trailers.

The average web page will get between 5 and 15 chats for every 100 visitors.

Step 2 | Manage customer experience and chat volume

However, it's usually not a good idea to roll out chat to every potential contact point on the first day. Volume is unpredictable and a lack of trained chat agents could very easily lead to frustrated customers. So, to manage the initial chat volume, it's best to roll it out to a few key pages (e.g., checkout, main support page, and FAQ) before expanding.

[Monitor the number of chats](#) you get on an hourly and daily basis, determine how many agents you need, and finally tweak your workflow to deal with the chats. Once you've got everything set up you can roll it out to more pages.

All it takes to add chat to a select few pages is to include the [Zendesk Chat embed code](#) to those specific pages (instead of adding it site-wide). Speak to your development team on how this can be achieved.

Once you've determined where to place the widget, consider [customizing its design](#) to compliment your brand and website's visual style. [Customers have learned to appreciate good design and expect high quality experiences.](#)

To manage the initial chat volume of chat, it's best to roll it out to a few key pages before expanding.

Step 2 | Manage customer experience and chat volume

Chat access

Offering chat support to any customer that comes to your website can seem daunting at first. To keep chat manageable, it's a good idea to limit support. One way to do this is to restrict chat access to specific customers based on some criteria.

For example, you can place the chat widget behind a gated page, so only VIP customers can gain access. This will minimize the number of chats you receive and also encourage customers to upgrade to VIP status.

Chat is a great tool for qualifying leads, closing deals, and rescuing customers who are having problems.

If you're not sure about who should get support, it's a good idea to do a trial deployment for different groups of customers (e.g., potential vs. paying customers).

Note that, while gating chat access can be a good idea at first, it can limit your future sales potential. Chat is a great tool for qualifying leads, closing deals, and rescuing customers who are having problems. If chat is restricted to only a small group of people, you might be missing out on a big opportunity.



Chat timing

Initially, you should restrict the number of hours live chat is enabled on your website. A good rule of thumb is to stick to an average 8-hour workday (such as 9 a.m. to 5 p.m.). This will help moderate chats to a manageable level and you will only need to keep Zendesk Chat staffed for the 8-hour period. To make sure none of your agents go online outside of these hours you can set up [Operating Hours to limit access](#).

Step 2 | Manage customer experience and chat volume

Over **50%** of chats occur between the peak hours of 10:00am and 3:00pm.

When deciding on the availability timings for chat, make sure you monitor the peak periods.

Our research indicates that over [50% of chats occur between the peak hours of 10:00am and 3:00pm.](#)

Further, the majority of chats occur during the week, primarily on Mondays and Tuesdays.

Offering chat during the busy periods will quickly bring down your customers' wait time since chat, unlike phone, offers a 1-to-many interaction.

As your business grows across more countries, you may need to extend support hours.

When this happens you can again use [Operating Hours to create multiple schedules](#) or simply leave live chat enabled for 24 hours.



Foodpanda, an online food delivery marketplace operating in 40 countries and territories, has created individual Departments for each of its brands and also has multiple Operating Hour schedules. So, for example, the Nigerian team will be automatically signed in whenever their shift starts and they can start serving customers that come in from hellofood.com.ng.

Step 2 | Manage customer experience and chat volume

**Chat interaction (reactive vs. proactive)**

There are two ways agents can interact with customers over chat: reactively or proactively. Reactive chat occurs when a customer clicks on the chat widget to start a chat and an agent responds. In contrast, proactive chat gives your agents the ability to invite customers to chat based on predetermined criteria.

The screenshot shows a web browser window titled "VISITOR JANE". A circular profile picture of a person with a "J" is on the left. A message bubble from "Visitor Jane" says, "Hello. Do you offer free shipping?". An orange circular icon with a phone receiver symbol is on the right. A blue speech bubble from an agent says, "Hi Jane, yes, we offer free local shipping!". A large blue button labeled "REACTIVE" is on the right side of the screen.

The screenshot shows a web browser window titled "VISITOR BOB". A circular profile picture of a person with a "B" is on the left. A green message bubble from "Visitor Bob" says, "Hi, do you need any help?". An orange circular icon with a phone receiver symbol is on the right. A blue speech bubble from an agent says, "Yes, thanks. Where do I enter my promo code?". A green message bubble from the agent says, "You can enter it at the bottom of the page, after your address.". A large orange button labeled "PROACTIVE" is on the right side of the screen.

Step 2 | Manage customer experience and chat volume

Proactive chat allows you to pre-select specific conditions to automatically engage with customers, without having to manually filter them.

A recent Forrester study found that [44% of US online consumers](#) said they liked having a chat invitation appear during online research or purchase. This is unsurprising as customers who are stuck on a page will benefit from proactive assistance.

You can set up proactive chat in Zendesk Chat using [Triggers](#). For example, if you are using Google Analytics to monitor where the major website drop-offs are, you can build a Trigger that proactively reaches out to visitors and retain them. If most first-time visitors hang around for 50 seconds before bouncing off, you might want to proactively chat with them at the 45th second.

Similarly, you can create a Trigger on the checkout page that automatically asks customers if they need help after a few minutes have passed. In this way, proactive chat can help customers make a purchase and reduce cart abandonment.

Keep in mind though that using proactive chat will significantly increase the number of chats you receive. If each customer is being asked if they need help, many will respond and your agents will have to offer support (or risk leaving a customer unsatisfied). So, if you don't have prior experience deploying chat, it's a good idea to start with reactive chat before deploying it proactively.

If you don't have prior experience deploying chat, it's a good idea to **start with reactive chat** before deploying it proactively.

“

Chat is very much part of the buying moment so, from an e-commerce perspective, we're able to be very proactive with triggers. We can understand when someone is having difficulty and to intercept that and educate them, and to give confidence where they need it.

The results are amazing.

[Kevin Zyskowski, Head of Customer Experience](#)



Deciding on the location, access, timing, and type of chat will influence the overall volume. If your site experiences high traffic, it's not a good idea to roll out chat on all your pages, enable proactive chat, and have just a single agent. This is a good way to overload that one agent and have a bunch of angry customers.

Plan for a slow roll-out and monitor your chat transcripts and CSAT.

Step 2 | Manage customer experience and chat volume**Additional considerations**

As you implement chat on your website, consider the following:

1. How does a customer currently reach you for support? How can that experience be improved?
2. Do you have experience deploying chat?
3. Where do your sales conversions occur? What influences your customers' purchase decision?
4. Where are the gaps in the buying process? Can easy access to chat bridge these gaps?
5. Do you know which group of customers you want to provide chat support to?
6. Do you currently provide tiered support to paying customers? Do you only want to provide chat to qualified customers, i.e. those logged in?
7. Do you sell locally, globally, or to certain regions only?
8. Do you know which time of day brings the highest volume of email tickets or phone calls?
9. Do you have a global support team, i.e. many dedicated teams supporting each region? Or do you provide support for everyone from a central location?
10. Are there any obvious customer traits which require real-time chat intervention?

STEP THREE

Determine your staffing requirements

In the previous section we discussed the user experience factors that can impact chat volume. While you are designing your chat experience, you'll also want to consider how many chat agents are needed for your support team.

Calculating the number of agents

Each organization has its own set of support requirements and consequently will have different staffing needs. But, to make things easier we've outlined some of the issues you must consider when determining the number of agents required by your support team.

01

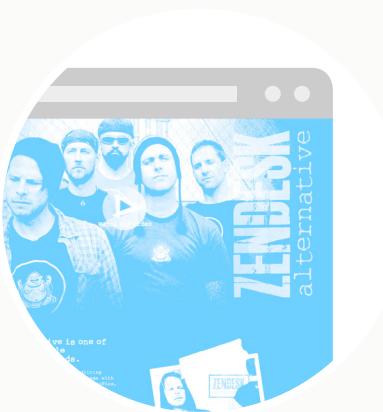
First, access the Zendesk Chat Staffing Calculator:

Staffing calculator

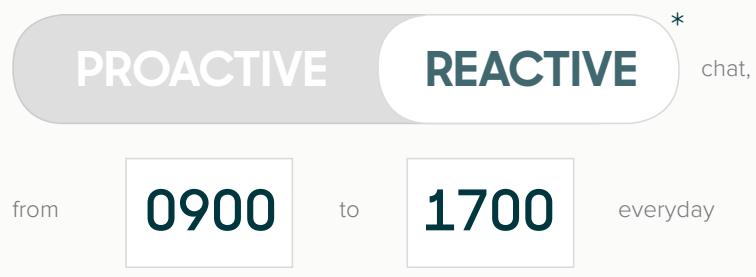
02

Answer the questions in the calculator to determine how many agents your website needs.

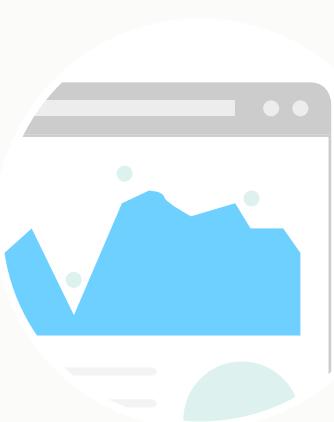
Let's take a look at how a sample company, ZD Alternative, uses this calculator:



This is ZD Alternative's website. They want



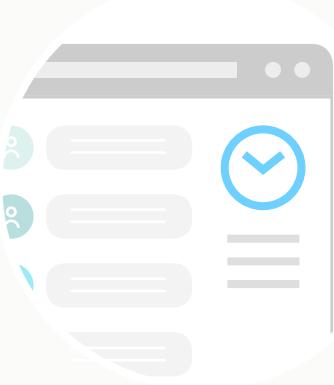
* Our research indicates that **reactive** chat results in **10%** of website visitors requesting a chat and **proactive** chat results in **15%** requesting a chat.



Through Google Analytics, they know they get about

10,000

visitors during that time, each day.



They want each agent to spend an average of

12

minutes per chat, and to take about

4

chats at a time.

[Click to access the Staffing Calculator](#)



03

Use our calculator to estimate your staffing needs.

Based on this we can estimate that:



ZD Alternative will get 1,000 chats a day

10% of website visitors, which is a conservative estimate for reactive chat



They will have 125 chats per hour

1,000 chats per day divided by the 8 hour chat availability period



So ZD Alternative will need 6.25 agents

25 agents can solve 125 chats per hour at 12 minutes a chat.

6.25 agents can solve the same number if they serve 4 chats at a time

Keep in mind that the above formula is merely a guide and ignores things like breaks for your agents, multiple shifts, and varying customer requirements.

Once you've settled on your staffing needs, keep [monitoring your wait times and CSAT](#) to ensure it's the optimal number. There's a tendency for [live chat CSAT to fall as the number of chats per agent rises](#) and wait times increase.

Click to access the Staffing Calculator



Step 3 | Determine your staffing requirements**Building an advanced staffing model**

Our staffing calculator and formula above will help you approximate how many agents are required, but the final number depends on your organization and business objectives. Here are some other considerations to keep in mind when deciding on the number of agents:

What is your chat goal?

If your goal is to reduce your overall support costs you would naturally want less agents. But if your goal is to increase CSAT, then having a lower agent-to-customer ratio is advisable.

How complex is your product and the expected queries?

Complex products will require more support for the customer. So, agents might need to spend more time with customers, thus driving up the average chat duration. To ensure customers don't have to wait too long to be served, you should consider adding more agents.

When do you get the most chats?

To get a better idea on the number of chat agents needed during the peak and low volume periods, break down traffic by hour for the busiest day, and estimate the number of chats that will come in across the day. Divide this based on the number of chats that each agent in these shifts can handle.

To ensure
customers don't
have to wait too
long to be served,
you should consider
adding more agents.

Step 3 | Staff Zendesk Chat with enough agents**How experienced are your agents?**

An agent without prior chat experience can take only 1-2 active chats simultaneously, while an experienced agent can easily take 4-6 chats. So, if all your agents are new to chat you may need to lower the number of simultaneous chats they are expected to take. This can impact your staffing considerations.

How long does it take to resolve tickets?

If a majority of your tickets can be solved in one touch—within 15 minutes via email—these tickets could be easily resolved on chat within a shorter period of time. Assuming you have 10 agents clearing Tier 1 tickets via email, you can clear these queries with less than 10 dedicated chat agents.

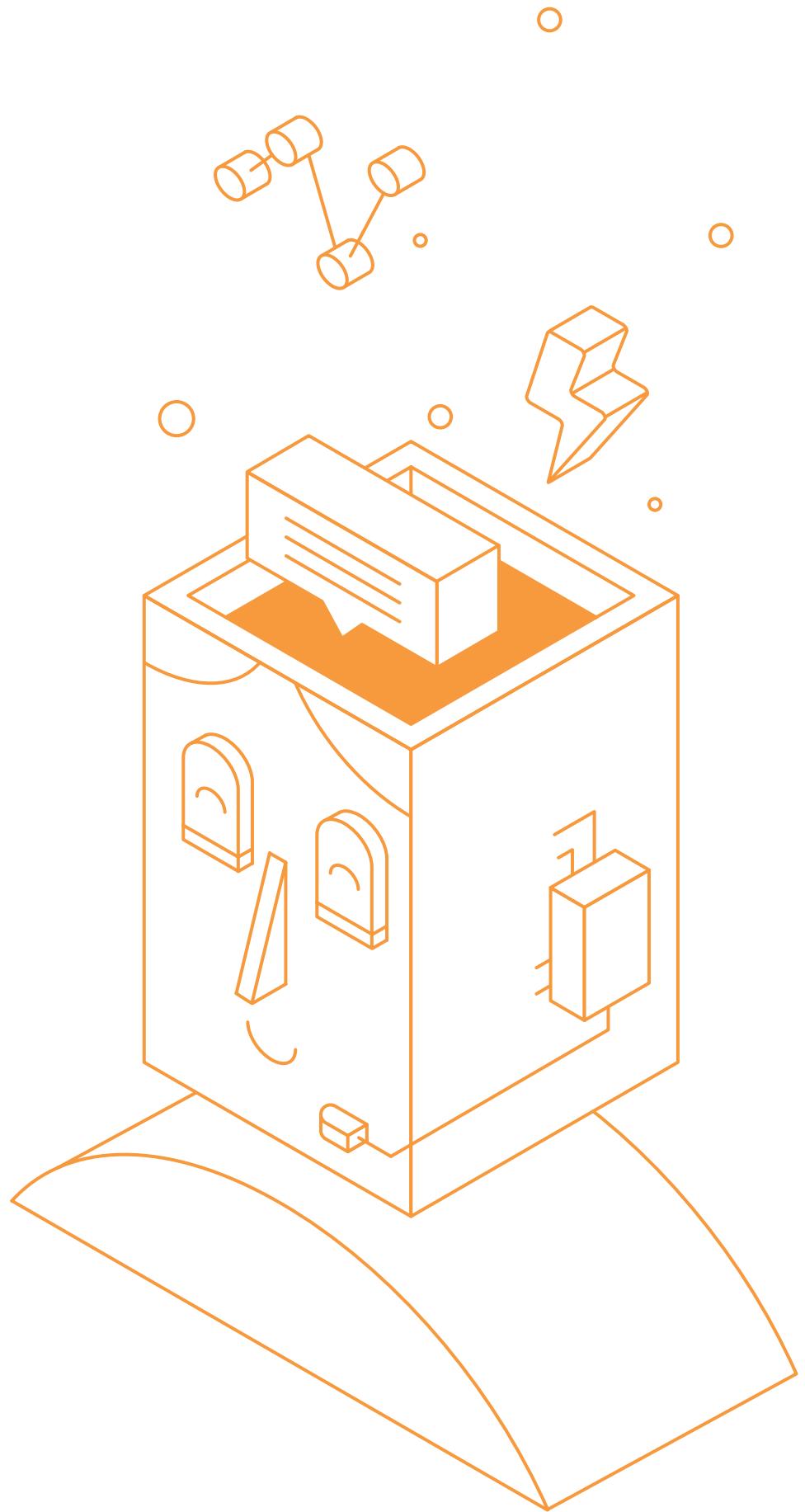
Are the agents going to be supporting more than one channel?

If agents are switching between supporting chat and other channels they might not be able to handle as many chats as a dedicated agent. Keep this in mind when deciding how many agents to hire to staff chat.

Will you be using Chat Routing?

When [Chat Routing](#) is enabled, all incoming chat requests automatically get routed to an agent. This ensures that all agents get the same number of chats. With this feature enabled it is far easier to estimate how many chats each agent will serve.

An agent without prior chat experience can take only 1-2 active chats simultaneously, while an experienced agent can easily take 4-6 chats.



STEP FOUR

Train your agents

Unless your agents have had experience with other live support channels (such as phone support), it's important to make sure they are trained and kept up to speed on how to chat with customers.

First, you must ensure your agents have a solid understanding of your product or service. Second, you must provide guidance on the proper etiquette for chatting with customers. Third, agents need to be acquainted with Zendesk Chat.

Give agents the relevant knowledge

When a new agent joins your team, they will lack the relevant product or service knowledge. To get them onboarded, make sure you have a well-organized internal knowledge base they can use to learn about your product or service. Once they have read through the KB, test them on the material. If they cannot answer basic questions about your product or service, they won't be able to help customers.

To make complex answers easier to deliver, consider creating [shortcuts](#) with product-specific information. These will allow agents to quickly answer challenging questions.

Having an internal [shared knowledge base](#) is also useful for agents to keep themselves apprised of the latest product updates.

To make complex answers easier to deliver, consider creating shortcuts with product-specific information.

In general, the agent knowledge base, standard text, canned messages, snippets, and URLs should be shared and integrated. Creating and maintaining individual information repositories is expensive and difficult to maintain. It also increases the risk of creating and using contradictory information which will erode the customer's level of trust.

Step 4 | Train your agents

Teach chat etiquette

Having the relevant product knowledge is important, but chat is quite different from email or even social support. Customers won't wait minutes, let alone hours for a response and the onus will be on the chat agent to ensure they are able to serve customers in real-time.

In general, customers perceive chat as a more personal interaction channel than say email.

Customers are used to "chatting" with their friends and family over SMS—a platform where emojis and LOLs rule—so they might expect a similar tone when talking to the chat agent of a business. However, it's never a good idea for your agents to assume this. It's best for agents to assess each situation individually and when in doubt, err on the side of formality.

To ensure agents are providing customers with the best possible responses, create a few generic [shortcuts](#). For example, you can create a simple greeting shortcut that agents can use for all customers ("Hi! Welcome to Zendesk. Is there anything I can help you with?"). Not only does this ensure that your brand voice stays consistent, less confident agents can use it to get their feet wet.

Finally, always review chat transcripts and CSAT scores. These will show if customers are happy with their experience and if your agents are able to maintain your brand voice.

Customers
perceive chat as
**a more personal
interaction channel**
than say email.

Step 4 | Train your agents

Ask all new agents to sign up for a Zendesk Training account and take the course.

Train agents on Zendesk Chat

We've designed Zendesk Chat to be beautifully simple. In fact, it's so simple it only takes a couple of minutes to install and start chatting with customers. But, Zendesk Chat also comes with a variety of tools that can help you serve your customers more effectively.

These features aren't particularly complicated, but to help new agents get started we've come up with an online course to explain how to make the most of Zendesk Live Chat.

The [Zendesk Chat Agent Essentials](#) course lasts 45-60 minutes and is geared towards helping agents learn the basics of chatting with customers on Zendesk. Here are some of the topics covered in the course:

- Getting started with Zendesk Chat (including personalization)
- Chatting with customers
- Using advanced features (like [shortcuts](#) and [file sending](#))
- Proactively starting conversations with visitors
- Completing a chat

Ask all new agents to sign up for a [Zendesk Training](#) account and take the course. It costs \$149 per agent.

Step 4 | Train your agents**Additional considerations**

Before creating a training plan for your agents, here are some questions to consider:

1. How complicated are your products?
2. What is the experience level of your agents?
3. What kind of resources do agents have access to? What can they share with customers?
4. Do you normally see customers asking the same kinds of questions?
5. What is the native language of your agents? Is it the same as the majority of your customers?
6. Do you have very strict brand or similar guidelines?
7. Do your agents have experience with other chat or live support products?

STEP FIVE

Build a Chat workflow

Most companies don't simply offer chat support, they also have email, social media, help forums, FAQs, and phone support.

Providing support across multiple channels is challenging, yet essential for an organization that wants to offer the best experience to its customers. For example, if a customer asks about your shipping policy on Facebook instead of simply answering the question, it might be more effective to give the answer and also link them to a page on your FAQ. The customer probably had a number of related queries and by showing them the FAQ section you've answered all their questions in one go.

Not only will this increase CSAT it will decrease overall chat volume and response rates. Putting processes in place to deal with this kind of ticket deflection is critical to the success of the chat channel.

Find the right tools for support

To ensure you can monitor the status of all your channels from one dashboard, we would recommend using a customer service platform like [Zendesk Support](#).

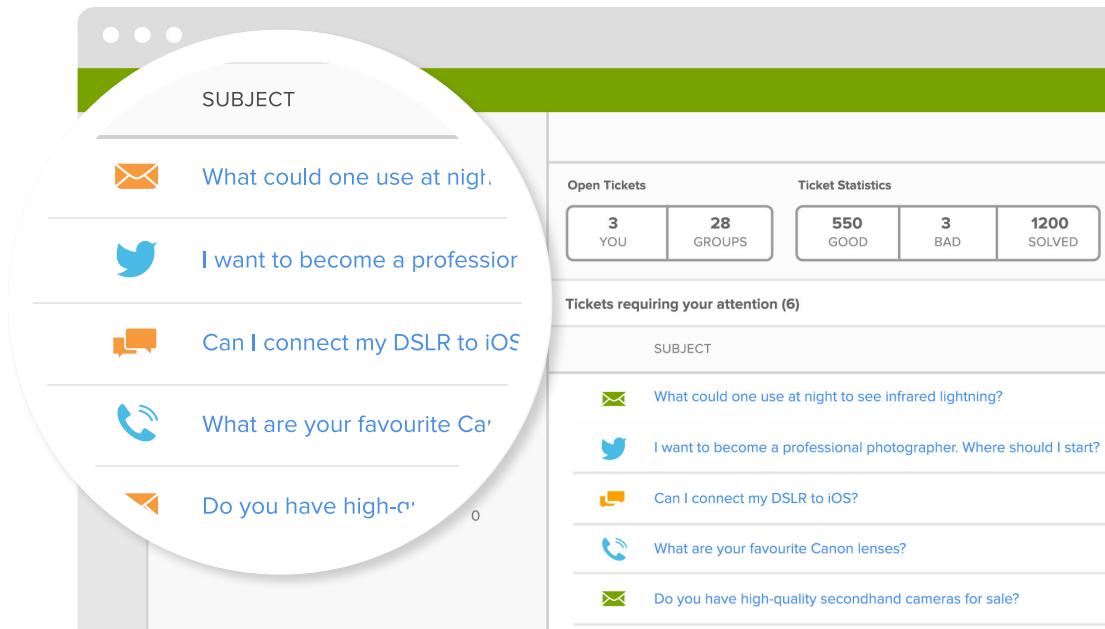
Zendesk Support's platform makes it easier to:

1. Respond to customers (customer support)
2. Offer self-service answers (help center)
3. Proactively engage

Providing support across multiple channels is essential for an organization that wants to offer the best experience to its customers.

Step 5 | Build a chat workflow

Zendesk Chat is seamlessly built into Zendesk Support, so agents can quickly switch between serving chats, phone calls, emails, or social media messages.



Build a workflow

To ensure you can monitor the status of all your channels from one dashboard, we would recommend using a customer service platform like Zendesk Support.

Once you've chosen a support suite that works well with Zendesk Chat, you'll want to set up a workflow that addresses the following:

1. A consistent support experience for customers
2. A reliable escalation path
3. An agent assignment plan
4. Real-time channel management and monitoring

Step 5 | Build a chat workflow

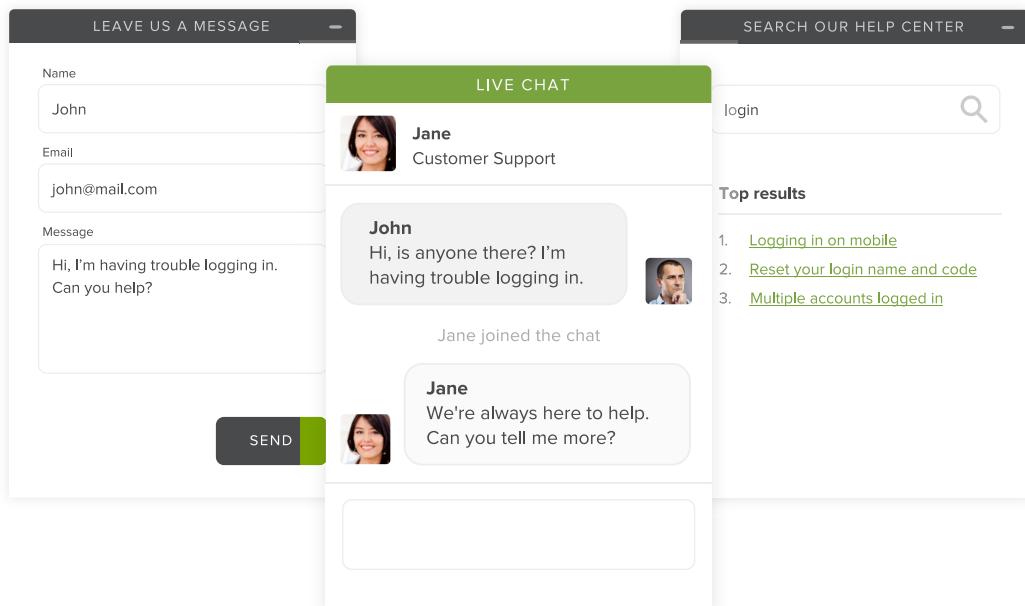
Support experience for customers

Research shows that [83% of online shoppers need support to complete a purchase](#). What this suggests is that a business that does not offer some form of support will lose up to four-fifths of its customer base.

However, customers are more comfortable connecting with business [using their preferred channels](#) and at times of their choosing. So, it's important to be able to anticipate how your customers want to contact you, and offer them that choice.

Using Zendesk Support you can set up email, phone, social and chat support, as well as an FAQ page, forums, and a help center.

When visitors come to your website they will be greeted by the [web widget](#) letting them start a chat, access your help center, or email for support, all without interrupting their shopping experience.



This seamless support experience will enable customers to get support however they want.

Step 5 | Build a chat workflow

Offering multi-channel customer service is the core of any organization's support strategy.

Escalation path

In most cases, your chat agents will be expected to solve a customer's problem on the first try. However, there will be situations where the agent will lack the knowledge, expertise, or time to offer a solution. In such cases, it's a good idea to have a plan for escalation.

With Zendesk Chat+Support you can easily assign a chat ticket during or after a chat to another agent. The second agent can then directly communicate with the customer (for example via email) and resolve their issues.

Escalation has three major benefits:

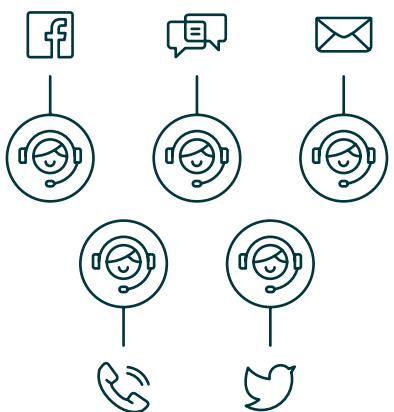
- The most qualified agent handles the issue
- Front-line chat agents are able to free up their time and help multiple customers
- Deficiencies in the support process can be easily traced and rectified

Agent assignment plan

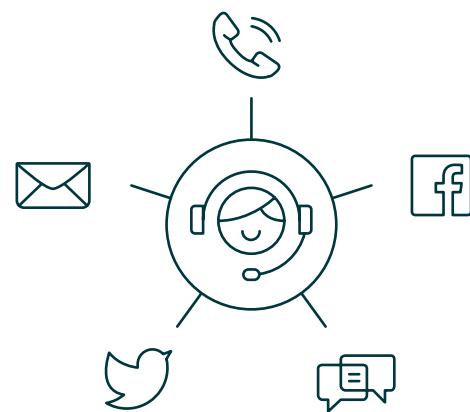
Offering multi-channel customer service is the core of any organization's support strategy. But, in some cases it's not possible for agents to do everything and it's critical that there is a plan in place for assigning agents to channels.

There are two methodologies for channel assignment: a shared agent model and a dedicated one.

In a shared model, agents handle some or all channels simultaneously. In a dedicated model, agents are focused on a single channel.



Dedicated model



Shared model

Step 5 | Build a chat workflow

A dedicated model allows the support team to scale more effectively.

Dedicated model

There are pros and cons to either method, but in general if your organization has more than 10 agents it is recommended to use the dedicated model. In this format, agents focus their attention on customers from one channel. For example, chat agents would only service chat customers for the duration of their shift.

This model allows agents to develop a solid understanding of one channel and find the most effective methods of helping customers. Further, a dedicated model allows the support team to scale more effectively.

However, the downside of this model is that agents often don't get a deeper understanding of a customer's problems as they end up escalating complex queries. This results in them (potentially) developing a shallower skillset.

Shared model

In a shared model, agents are expected to work on the channels that require most attention and then switch over to other channels as they become busier. For example, a shared agent might start their day working on email support, but then switch over to serving chats as more start coming in.

The advantage of this model is that agents maximize their time and are always solving customer queries. However, an agent would have to be highly trained to be able to effectively switch between multiple channels with little notice.

Real-time channel management and monitoring

Escalation paths and channel assignment plans can go out the window during periods of high volume, like Black Friday sales. To ensure your customer service levels aren't dipping, it's important to have a manager who is always looking at your support metrics. Using Zendek Chat's [Real-Time Monitoring](#) dashboard, a support manager gets an overview of the size of the incoming chat queue, the average wait time, the overall agent chat load, and of course the CSAT score.

Using this dashboard, the support manager can make quick decisions to ensure customers keep receiving the same quality of support they are used to. For example, if the support manager notices that the chat queue is growing and wait times are increasing, they can pull an agent from another channel and ask them to start serving customers on chat.

Step 5 | Build a chat workflow

Zendesk Chat's native features

Zendesk Chat offers a number of features that make it easier to manage your chats:



[Shortcuts](#) or “canned responses” can be used to create greetings, queries in different languages, responses to frequently asked questions, and links to the help center. Shortcuts helps agents reply to questions much faster and helps you maintain brand consistency.



[Departments](#) are useful to segment agents on the basis of location (country), product, brand, business unit (billing, support), or even skill-level. This ensures that the agent with the most knowledge is dealing with a particular query.



[Triggers](#) are a great way to proactively engage customers and increase conversions. Triggers let you automatically create actions based on certain criteria. For example, you can create a Trigger to assist visitors who get stuck on a particular page of your website.



[Chat rating](#) lets customers leave a positive or negative feedback during a chat. This lets you measure CSAT and agent performance.



[Analytics](#) gives you a bird’s eye view of your chat and agent activity. You can use it to track the chats you have with customers and increase the efficiency of your team.



[Chat routing](#) automatically assigns incoming chats to active agents. This ensures your customers receive prompt support, your agents don’t get overloaded and your team managers can manage volume.



The [Real-time monitoring](#) dashboard offers managers an easily digestible overview of chat, agent, and CSAT metrics. This allows you to make short-term workforce management decisions by providing actionable data on chat volume, visitor experience, and agent performance.



The [High Load Dashboard](#) is useful for organizations with thousands of concurrent visitors. It will only show incoming chats and currently served visitors, all other visitors remain hidden.

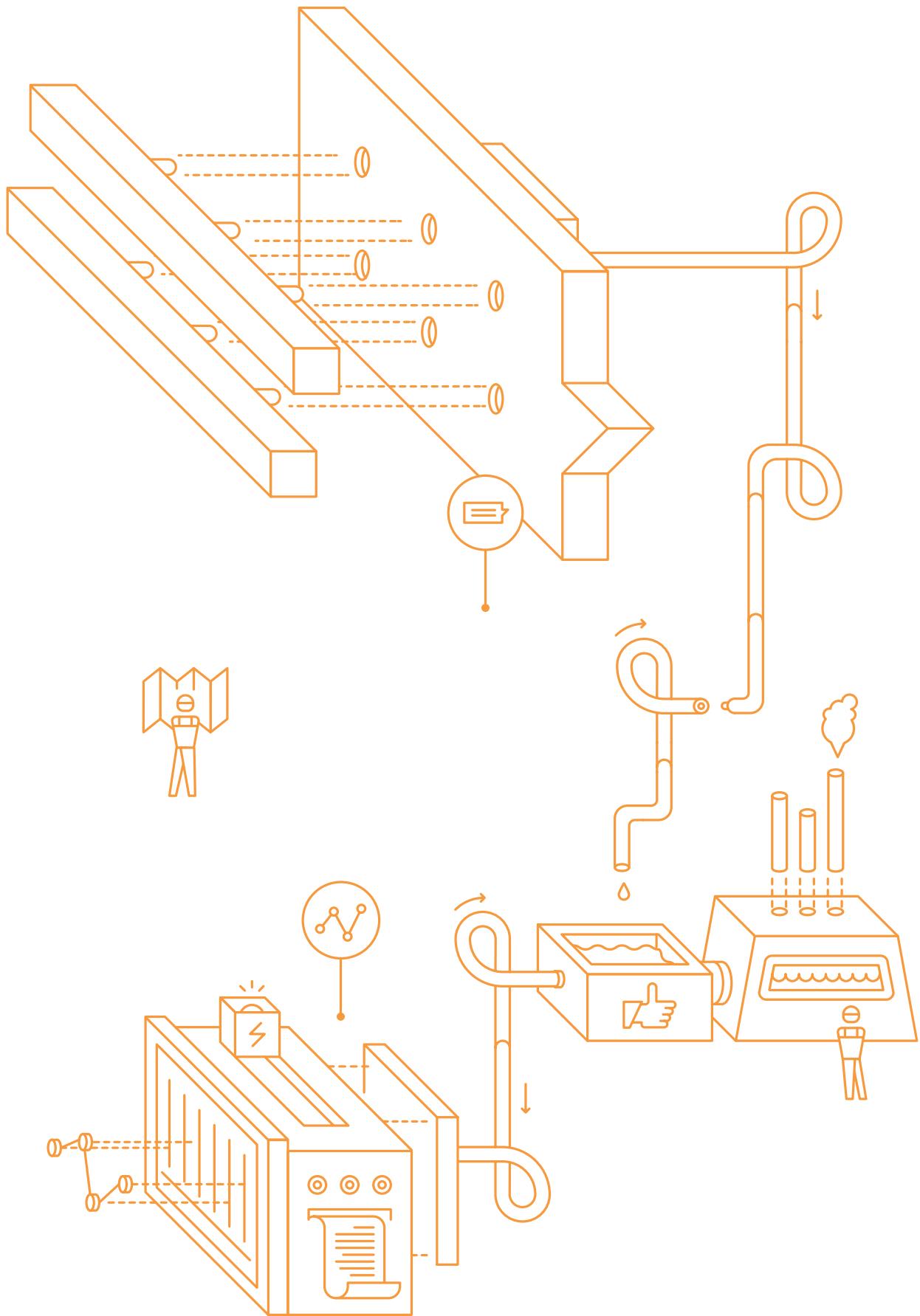


The [REST API](#) can be used to export chat, agent, and visitor data into third party apps. You can use this data to build your own reporting and monitoring tools.

Step 5 | Build a chat workflow**Additional considerations**

As you fine tune your work flow, keep the following in mind:

1. Which channels do you offer (or plan on offering) support for?
2. What feedback have customers given about your support offering?
3. What is your support budget? How many channels can you effectively staff?
4. What kind of experience do you want to offer customers?
5. Do you want to give customers the option of choosing the support channel they want to use? Or would you like to provide chat first and only offer phone support for escalations?
6. Who's going to provide chat support? Is there a dedicated chat team or will your existing email team do both email and chat support?
7. How experienced are your agents and support managers? Can they manage more than one channel?



STEP SIX

Monitor success metrics and improve chat deployment

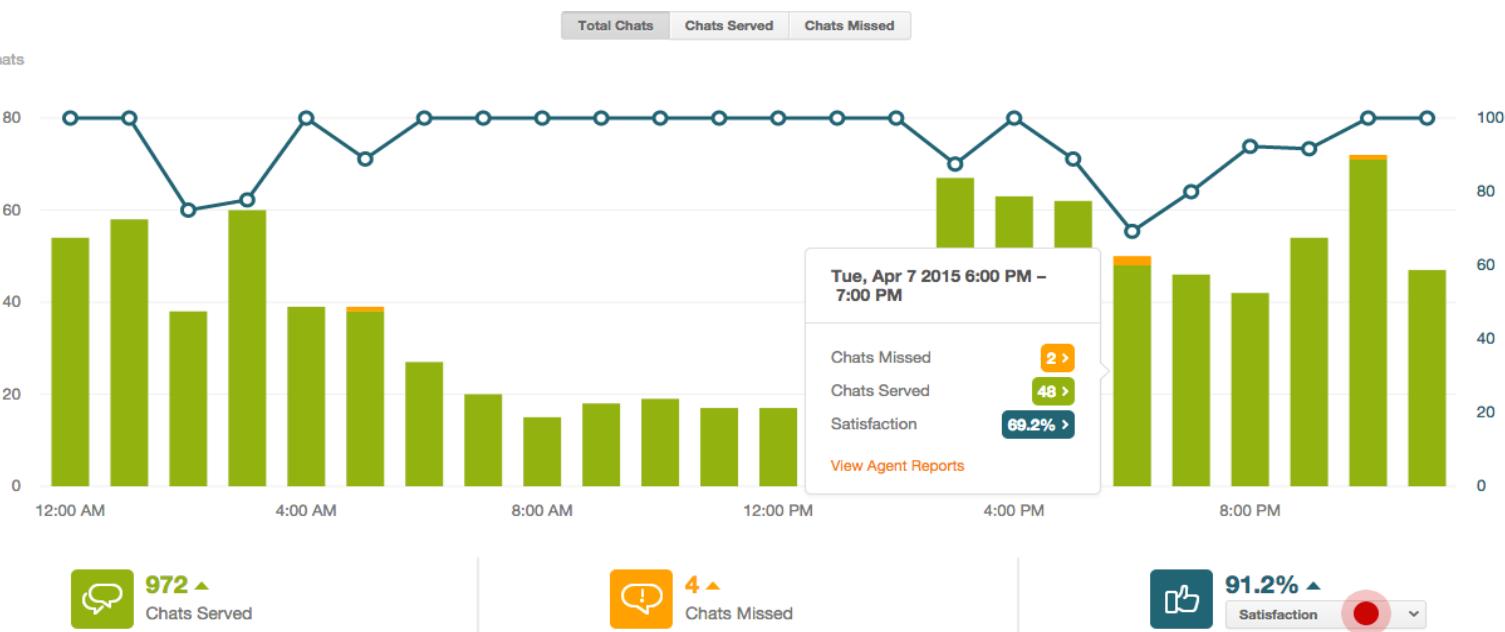
Once you've got chat up and running, it's useful to monitor [Analytics](#) data on a regular basis to improve and iterate. Here are some examples of how reporting can help you organize your support team:

EXAMPLE 1

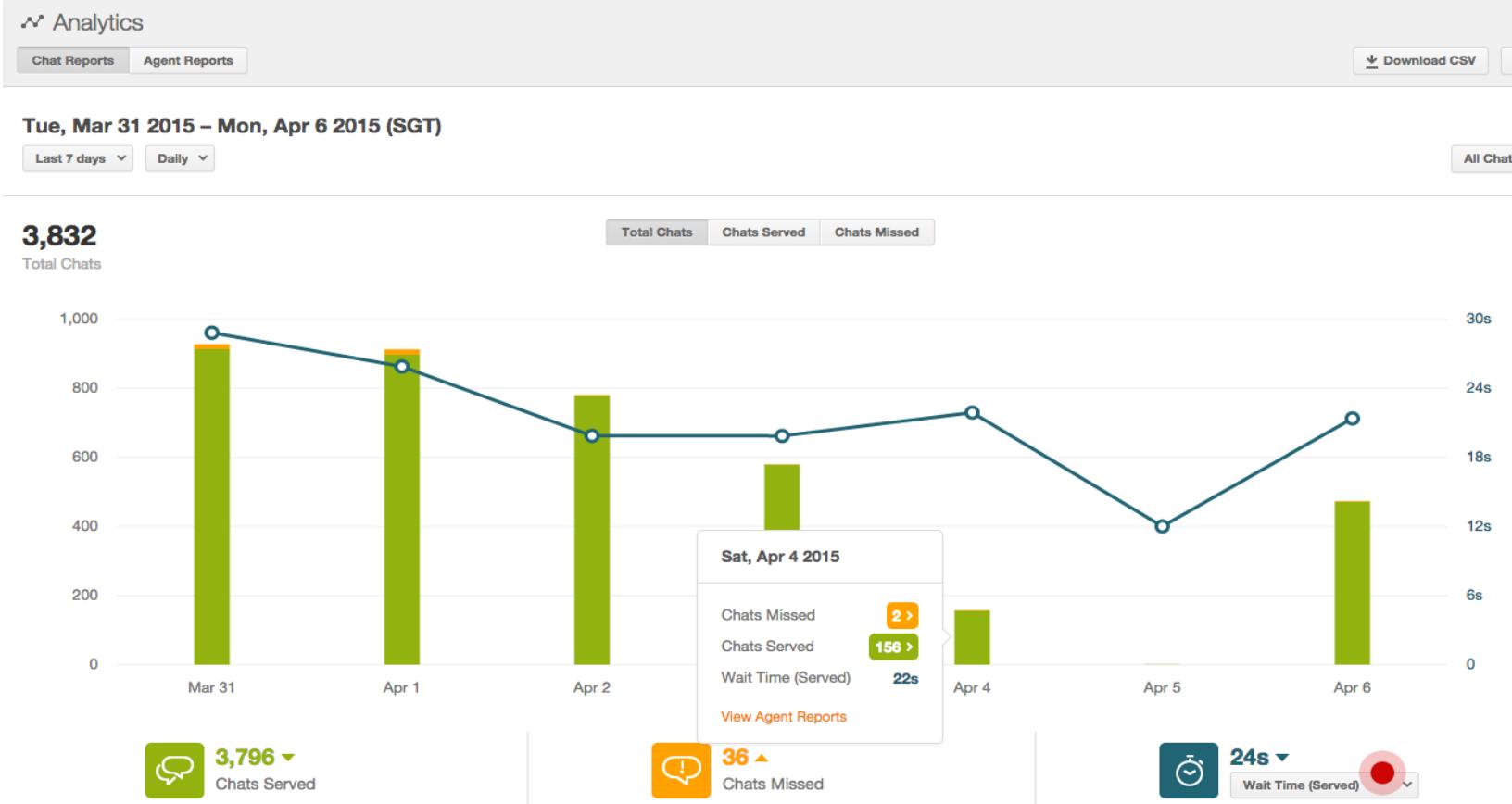
Layering CSAT against chats served shows you if there are any dips in satisfaction and drill down to its root cause. Perhaps one of your agents was underperforming on a particular day.

976

Total Chats

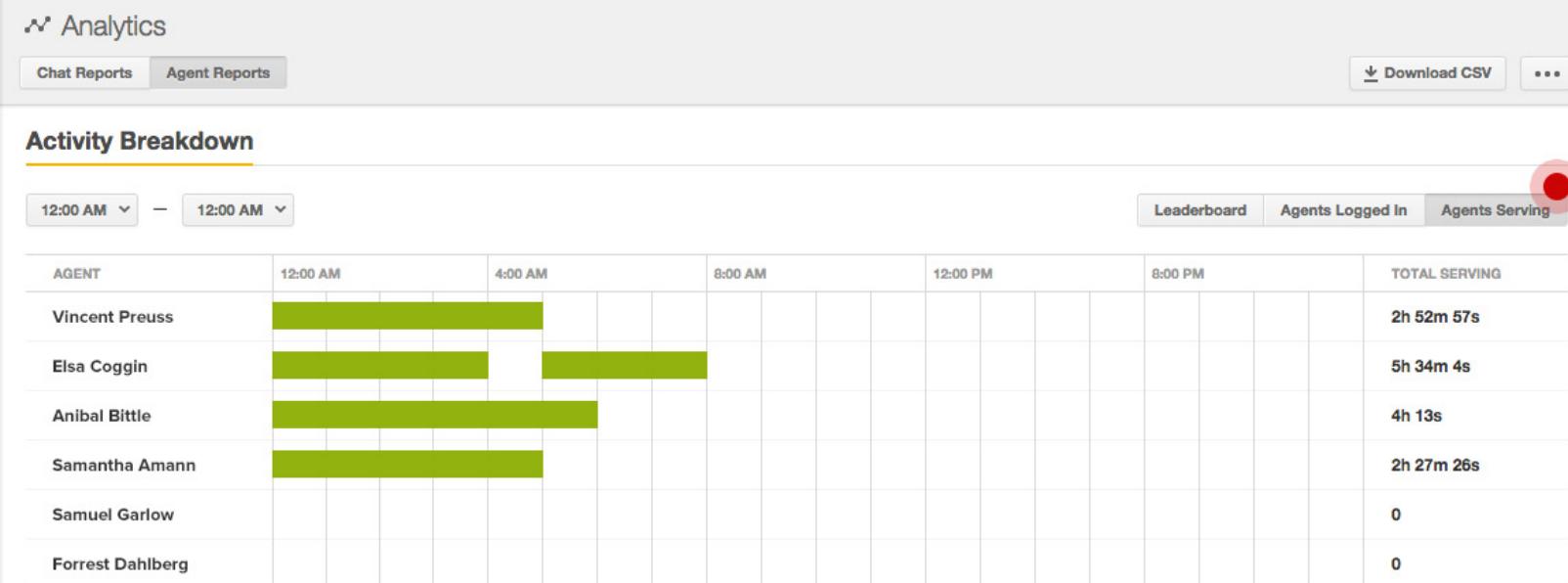
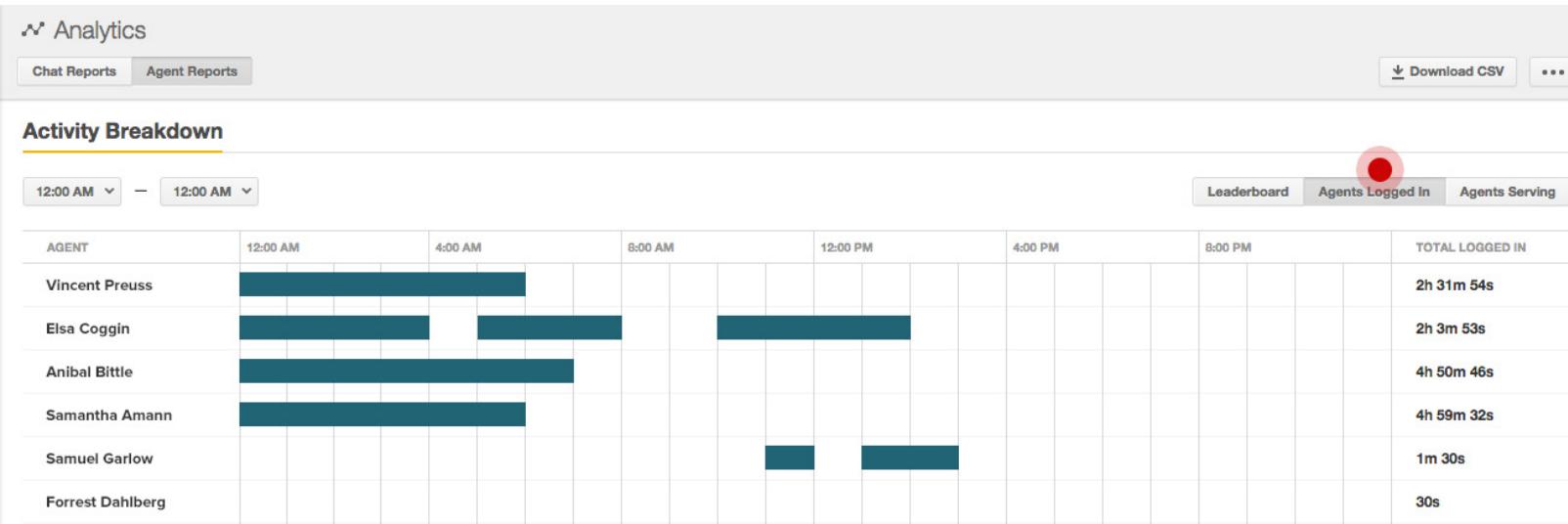


Step 6 | Monitor success metrics and improve chat deployment

**EXAMPLE 2**

By monitoring the average wait time, you can determine if there was an unprecedented increase on a particular day and discover its cause. This will ensure customer response times are kept as low

Step 6 | Monitor success metrics and Improve chat deployment

**EXAMPLE 3**

Drill down to Agents Logged In and Agents Serving with Zendesk Chat Analytics.

Step 6 | Monitor success metrics and improve chat deployment

as possible.

Knowing how productive your agents are can help you understand your support operations better. It also allows you to deploy agents during busy periods to maintain high CSAT rates.

By pulling up both Agents Logged In and Agents Serving, you'll be able to compare between when agents were online and when they were actually serving chats. If you notice that there were some agents online and not serving, you'll know why wait times increased.

Using data and reporting, you can keep an eye on your chat satisfaction and agent productivity and ensure you are offering the best service possible.

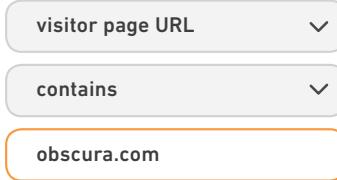
BONUS

Using Zendesk Chat on multiple websites

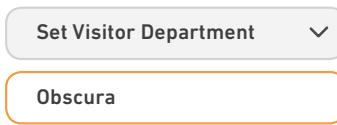
Although Zendesk Chat does not offer a bespoke multibrand solution, it's possible to segment customers on the Zendesk Chat Dashboard and offer them differentiated support. Here's how:

1. Add the same Zendesk Chat embed code to all your websites.
2. Create a unique Department for each website (e.g., if you have the following websites: "obscura.com, jubilee.com, boomerang.com" you can create three Departments called "Obscura", "Jubilee", "Boomerang").
3. Add agents to each new Department. Depending on the volume of traffic you get on your websites, you may want to have a different number of agent for each Department. Also, consider the skill and knowledge required for the different websites/Departments when assigning agents
4. Next, you want to set up [Trigger based routing to Departments](#). This will automatically assign chats that come from one of the websites to its corresponding Department. To set this up do the following:

- Create a Trigger and add a name and description
- Set the Trigger condition to:



- Make the action as follows:



Bonus | Using Zendesk Chat on multiple websites

Now any visitor that is on “obscura.com” will get automatically routed to the Obscura Department (and will be served by agents in that Department).

5. Disable pre-chat forms so customers don't have the option to change or select an alternative Department.
6. Finally you may want to modify the Zendesk Chat widget so it matches the branding on your website. To do this, you'll need to use our [JavaScript API](#).
 - You can [change the color](#) using the setColor parameter
 - Or you can add a different image using the setImage parameter
 - You can also change the design of the chat window by using the setColor, setSize, and SetTitle parameters.

EXAMPLE 3

You can use the following API script to change the color of the chat widget on different pages:

```
<script>
$zopim(function() {
  $zopim.livechat.theme.setColors({badge: '#FFFFFF', primary: '#000000'});
  $zopim.livechat.theme.reload(); // apply new theme settings
});
</script>
```

Using this script you can change the color of the chat badge (“badge”) or of the minimized chat widget (“primary”). The color you choose must be inserted in hexadecimal format.

Similarly, you can also change the color scheme of the chat window:

```
<script>
$zopim(function() {
  $zopim.livechat.window.setColor('#FFCC00');
  $zopim.livechat.theme.reload(); // apply new theme settings
});
</script>
```



foodpanda

Foodpanda has created a different Department for each of its brands/websites.

They have then created a Trigger such that whenever a customer from a particular website starts a chat it automatically gets routed to the corresponding Department. In this manner they can support multiple brands across different countries.

For more information on setting up and using the Zendesk Chat API read our [post](#) or contact chat@zendesk.com.

Summary

Zendesk Chat can be instrumental in helping your business increase sales, reduce support costs, and improve customer satisfaction. Together, Zendesk Chat+Support can become the single solution for all customer contact.

To get started we recommend you thoroughly plan out your chat deployment by setting the right objectives, hiring an appropriate number of agents, training them well, and creating a workflow. Once you've got chat up and running remember to keep a close eye on your success metrics and iterating.

We also have a team of consultants who are ready to help should you need more detailed guidance. Drop us an email and we'll get you set up for success!



About Zendesk Chat

[Zendesk Chat](#) develops intuitive products that redefine online customer experiences.

Zendesk Chat's award-winning live chat solution helps businesses increase sales conversion by engaging important leads on their websites. With over 27,000 customers using Zendesk Chat, it has become one of the leading providers in its space.

AUTHOR

Abhiroop Basu

Product Marketing Manager at Zendesk Chat

abasu@zendesk.com