



# The definitive guide to customer service for online stores

***Are you an ambitious online store owner looking to take your customer service to the next level and beat the competition?***

If so, the ROBIN guide covers everything you need to know in one practical guide - from the principles of great customer service, to setting strategy, building a profitable operation, and managing great conversations that will floor the competition.

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**ROBIN**

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PRELUDE

# The Definitive Guide To Customer Service For Online Stores

# Preface: The Customer Service Nirvana



As the owner of an online store with a slick design, stand-out product, cool brand, and entrepreneurial spirit, you are passionate about building your business, your brand, and delivering great customer service.

Us too. Great customer service is our way of life, our mission, and our strategy. Our secret weapon is our approach to intelligent customer communication and real-time customer service conversations — interaction that increases conversions, builds retention and reduces costs.

We both know why we love customer service so much, right? Word on the street is that great customer service builds trust and loyalty like nothing else. And there's more too...

## The benefits of great customer service

- We've read 91% of unhappy customers simply leave and never come back<sup>1</sup>
- Reports suggest great customer service builds loyal customers who are worth up to 10 times more than their first purchase<sup>2</sup>. So why not continue to throw your money into a bigger and bigger customer service team?
- It is 6 or 7 times more expensive to acquire a new customer<sup>3</sup> than it is to retain an existing one. Doesn't this mean that great customer service will fortify your overall growth strategy?

- We've also read 78% of loyal customers help spread the word about their favorite brands<sup>4</sup>. So, clearly, your customer service is an amazing social marketing tool too! Right?
- And we've seen survey's say 54% of customers won't even consider switching<sup>5</sup> to a competitor when customer service from your company is top-notch. Well then, you can sit back and relax in the comfort of your forever returning customers...

All of these points seem to say that if you focus on exceeding all customer expectations and create customer satisfaction, the conventional wisdom is you'll discover riches beyond your wildest dreams!

Like us, you are probably wondering if this customer service nirvana is actually achievable, and whether giving great customer service will really get the results you're looking for.

We think the truth in all of this may surprise you.

## Getting down to business

This guide helps you cut through the hype, uncovers the truth behind great customer service, and helps you avoid having to trawl through a never-ending list of "3 ways to do this", "10 ways to do that". In this guide we will uncover:

- A definitive customer service model for your online retail shop that's proven to build customer satisfaction, loyalty, and profitability.
- A roadmap to real-time customer service/consumer conversations which will help you beat the competition, hands-down.

We suggest going through this guide step-by-step, chapter by chapter. If you have any thoughts or comments on any of the topics in this guide, just drop us a comment — we'll be happy to discuss!

See you on the other side.

- **Team ROBIN**

## Winning The Competitive Battle In eCommerce

Every definitive guide is driven by a big idea. After a ton of research, building on our own experience, and speaking with our own customers, here's ours:

*"If Customer Service is the New Battleground, then Conversation is where it will be won."*

In this post you will find all the research data – logically structured in two pyramids – to prove that personal, real-time Conversations will win the Customer Service battle in eCommerce.

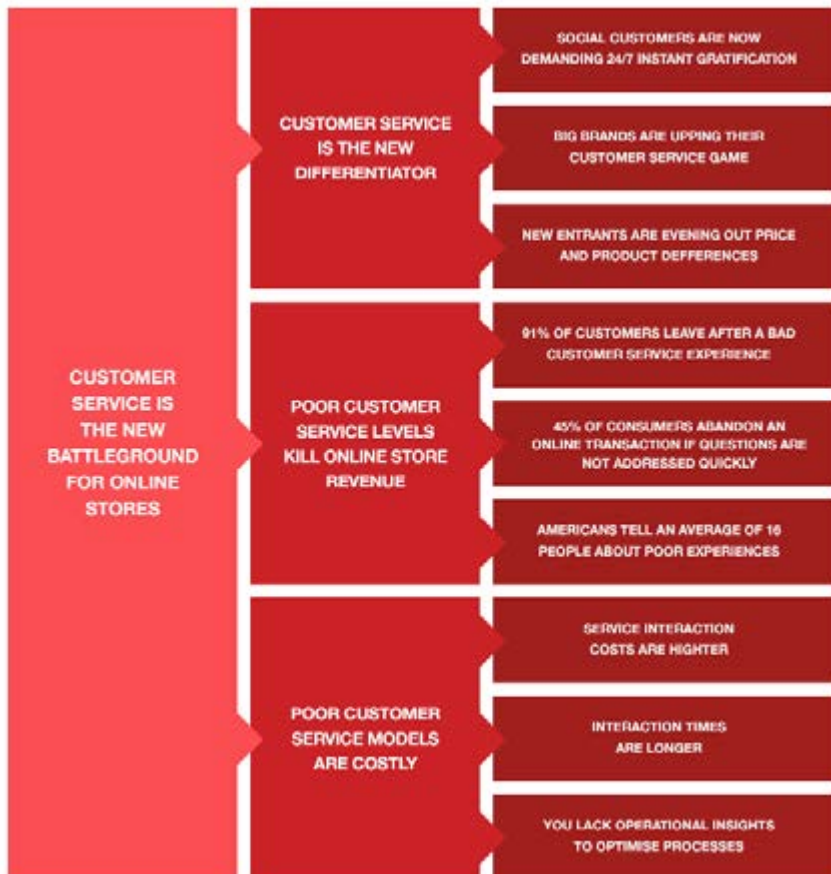
### Customer service is the new battleground

Although more shoppers are moving online, the eCommerce space is also becoming more competitive. There's a flood of new eCommerce players looking to steal your hard-won customers in apparel, home goods, beauty, accessories, electronics, food and drink<sup>6</sup>. Only the fittest will survive. And customer service is the new battleground. Why?

- Bigger brands are upping the game in terms of customer service<sup>7</sup> – the very place where you as a smaller brand used to have a clear advantage.
- With the big increase in product and brand choice, the full customer experience is swiftly becoming the differentiator in consumer decisions<sup>8</sup> and yet only 1% feel their expectations are always met<sup>9</sup>.
- Social consumers demand 24/7 instant gratification<sup>10</sup>; yet fewer than 5% rate their customer service interactions as “stellar”<sup>11</sup>.
- 91% of customers will stop doing business with you<sup>12</sup> following a bad customer service experience.
- Online stores with poor customer service grades have lower conversion and are costly to run thus undercutting brand values too.<sup>13</sup>.
- 45% of US consumers will abandon an online transaction<sup>14</sup> if their questions or concerns are not addressed quickly.
- A customer is 4 times more likely to buy from a competitor<sup>15</sup> if their problem is service related rather than price or product related.

- Americans tell an average of 16 people about poor experiences<sup>16</sup>.

All the stats tell us good customer service means online success, but as you've probably realized through your own store's experience, it just doesn't happen that way. You need to develop a great customer service model first. It should be your top priority.



## Conversation will win the competitive battle

By conversation, we mean 'real-time' service interactions that are both personalized and super-effective. Even though phone conversations are also real-time, we're focusing on live chat.

Why? Well, if you have the right foundation in place, then for smaller online stores, live chat can become your single biggest competitive advantage<sup>17</sup>. Here's why:

- Your competitors are looking the other way
  - Less than 60% of the Top 500 eCommerce stores offer live chat<sup>18</sup> — which opens up a clear competitive advantage for you as a smaller store.
- More consumers are demanding (and are happiest with) live chat
  - In 2012 65% of US shoppers used live chat<sup>19</sup> in (up from 58% in 2011) and that figure is set to grow.
  - At an average 1 minute 10 seconds, live chat offers the lowest response time of all channels<sup>20</sup>.
  - Live chat has the highest satisfaction scores for any customer service channel<sup>21</sup>, with 73%, compared with 61% for email and 44% for phone.
  - 88% of all customers want their problem solved in one single interaction<sup>22</sup>, and live conversation is the easiest way to deliver that.
- It helps generate a more profitable web store
  - 83% of live chat users say it increases conversion rates<sup>23</sup> by more than 20%<sup>24</sup>.
  - Chatters are 7.5 more times likely to convert<sup>25</sup> than non-chatters.
  - They spend 55% more<sup>26</sup> than non-chatters.
  - It helps lower average interaction costs<sup>27</sup>.
  - It helps reduce customer service rep task time<sup>28</sup>.
- It offers insight into your product, brand and site improvements
  - It helps you quicker optimise your product range and identify new add-ons, cross and up-sell opportunities
  - It helps you better understand your brand differentiator.
  - It helps you make web store improvements that your customers are looking for.
- It helps you better deliver on your brand promise.
  - As a web store service team, your brand is the biggest competitive advantage — even over your product<sup>29</sup>! And putting a personal, emotional, helpful human face on your brand is something that larger brands will never do as well as you.

So, when you do it well, real-time conversation in your web store can help you win the battle for today's consumers, keep you ahead of the competition, and even help turn your customer service operation from a cost to a profit centre.

And that's what the ROBIN guide to great conversation will help you do.



## Conclusion

As we've shown, if you want to be competitive today, a great customer service model is a must. It's first and foremost in a strategy to win on the battleground of customer service.

If you want to beat the competition as a small web store, great conversation can give you that edge — and live chat is the way forward!

## Endnotes

- 1 <http://www.1stfinancialtraining.com/>
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## CHAPTER 1

# The Three Principles Of Great Customer Service

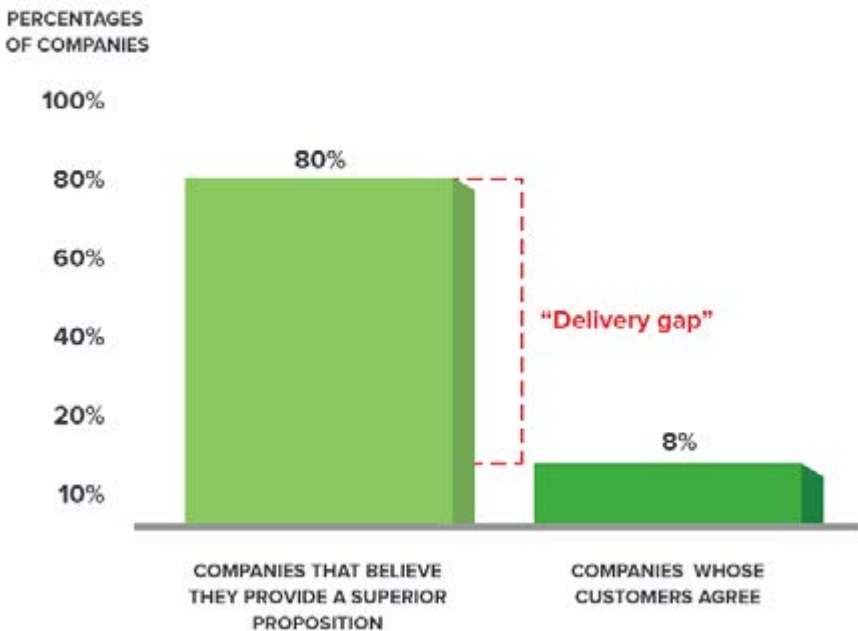
# 1.1

## Mind The Customer Service Gap

In the introduction we explained that great customer service from small online retail stores is the thing that will get them maximum customer loyalty — with minimum effort. Ultimately, that means a more profitable web store.

To help you get there, we developed three principles. Adhering to these principles will help keep your eye on the most cost-effective path to customer satisfaction and loyalty. We'll introduce them to you briefly below.

### 'MIND THE CUSTOMER SERVICE GAP'



But first, check out that stat in the image above: 80% of companies believe they deliver “superior” service, but only 8% of their customers agree. That’s just one part of what’s called the “customer service gap model” — a proven service industry standard for assessing the gaps between service expectations and delivery.

We're going to focus on two things for the small online retailer:

- The gap between what we think is good customer service and what our customers see as good customer service.
- The gap between what you as a store owner may think you need to do to deliver great customer service and what you actually need to do.

We want to help close and avoid both of those gaps. Along the way, some things may push you out of your comfort zone. But that's where the magic happens. At the stage of business you're in, we know you can handle it.

After a quick look at the principles, we'll take a reality check on your customer service ambition, then get down and dirty with satisfaction and loyalty, and we'll bust some myths along the way.

## THE THREE PRINCIPLES OF GREAT CUSTOMER SERVICE

1. PURPOSEFULLY BUILD KNOWLEDGE ABOUT CUSTOMERS' NEEDS AND EXPECTATIONS TO CLOSE THE SERVICE GAP.
2. REDUCE CUSTOMERS' EFFORT THROUGHOUT THEIR FULL SHOPPING EXPERIENCE TO BUILD LOYALTY.
3. SOLVE PROBLEMS IN A SINGLE, FRIENDLY, CONVERSATION TO PREVENT CUSTOMERS LEAVING.

**\*FOR AMBITIOUS ONLINE STORE OWNERS WITH A KICK-ASS BRAND**

Sound good for now? Then let's roll!

## 1.2

# Setting Your Customer Service Ambition



As an online store owner, you are first and foremost in “business-business,” not customer service business. So you need to balance your ambition, capabilities, costs, and outcomes very carefully.

The stats that claim customer service is the ultimate cure for almost everything which ails a business won’t help you develop a balance in your business. When did you last see a stat showing the costs of delivering the ultimate service experience? Not too recently we bet.

The usual starting point for most web stores is to aspire to Zappos-like customer service levels. But Zappos was built from the ground-up on service. And your store was built from the product and brand up! That’s a big difference.

The majority of B2B advice says online store owners should always aim to surprise, wow, amaze, or even delight their customers with completely awesome, unbelievably stunning, next-level customer service.

The problem? This is bad advice!

If your customer service efforts are aimed on delighting customers, and you do not address that customer service gap first, you will:

- End up investing more in customer service than it’s worth to your business
- Keep on losing customers!

Let’s bust some customer service myths to help explain.

## 1.3

# Busting Customer Service Myths



During our research for this guide, we uncovered many studies, reports, and articles from 2014 (Nick Toman guest post<sup>2</sup> and Forbes<sup>3</sup>), 2013 (Salesforce<sup>4</sup>), and 2012 (Harvard Business Review: Stop Trying to Delight Your Customers!<sup>5</sup>) that challenge conventional thinking about customer satisfaction, loyalty, and whether customer service should be a cost center.

The main source of data and insights for these posts is a Customer Contact Council<sup>6</sup> (CCC) 2008 study (which is ongoing) of more than 75,000 global customer service interactions. Despite the checking and backing of McKinsey, Harvard Business Review, and more, the data still causes a fuss today.

In their study, the CCC set out to answer three questions:

- How important is customer service to loyalty?
- Which customer service activities increase loyalty and which don't?
- How can you improve loyalty while still reducing operating costs?

To keep things practical, CCC also looked at the costs (at last!) involved in designing and delivering those customer service experiences. They measured the service costs against:

- Customers repurchasing
- Customers spending more
- Customers generating word of mouth.

We think that's a great approach. We grabbed that report, did some more research of our own, and matched it all up with the usual myths about customer service.

### **Myth #1: The more satisfied a customer is, the more loyal they are**

The study showed virtually zero relationship between satisfaction and loyalty. In other words, just because a customer is "satisfied" with you solving a problem doesn't mean they will stick around.

*"Between 60% and 80% of customers think of themselves as "satisfied" or "very satisfied" right before switching!"*

To customers, sorting out a problem just means you are competent, nothing more. That's no reason for a customer to become more loyal to your brand. They'd just rather not have a problem in the first place, thank you very much!

### **Myth #2: Delighting customers creates loyalty**

The study found that exceeding customer service expectations does not encourage people to buy again, buy more, or generate positive word of mouth.

Sure, any extras are nice to have for a customer, but the report shows you will get exactly the same loyalty benefits if you just focus only on meeting their expectations.

*"Telling [your] reps to exceed customers' expectations is apt to yield confusion, wasted time and effort, and costly giveaways."*

*- Harvard Business Review*

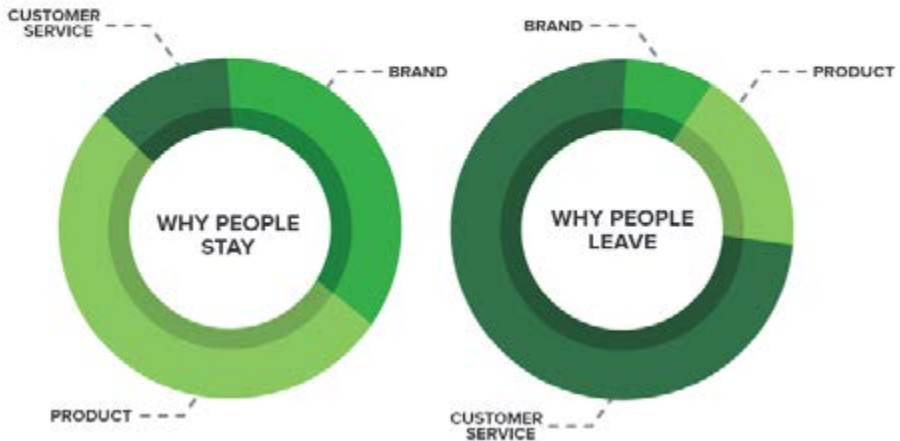
### **Myth#3: Customer service should focus mainly on building loyalty**

The study showed that customer service is 4x more likely to prevent a customer leaving than it is to create loyalty. So the most cost-effective use of your customer service is to actually prevent people from jumping ship.

When a customer contacts you, they just want their problem solved as quickly as possible, that's all. If you can do that, and stop them leaving, you are already winning.

### **Myth#4: Your customer service operation needs to be a cost-center**

## PEOPLE BUY BECAUSE OF YOUR PRODUCT OR BRAND, BUT MOST OFTEN LEAVE BECAUSE OF POOR CUSTOMER SERVICE



The CCC study showed that it is possible to turn a service operation into a profit-center — if you focus your service efforts where they are most effective. That means two things...

First, increase customer satisfaction by stepping up the soft skills of your team. Second, improve loyalty by reducing the amount of effort it takes for a customer to get their problem solved.

Myths busted! Controversial? Maybe. It may take a while to get your head around it all, but, after all is said and done, we think these insights make a lot of sense.

# 1.4

## The Three Principles Of Great Customer Service

Building on the service gap model (SERVQUAL<sup>7</sup>, if you would like to know more) and the data and insights from the Customer Contact Council<sup>8</sup>, the Corporate Executive Board<sup>9</sup> (great book here<sup>10</sup>!), and others, we distilled all the insights down into three core principles of great customer service.

These principles will help you set a clear ambition for your team and focus your own efforts in strategy. They also form the backbone of the following guide.

The important thing to remember is that these principles are all built on getting the most bang for your buck. In other words, they look at both the costs and the benefits of your various customer service activities realistically.

### THE THREE PRINCIPLES OF GREAT CUSTOMER SERVICE

1. PURPOSEFULLY BUILD KNOWLEDGE ABOUT CUSTOMERS' NEEDS AND EXPECTATIONS TO CLOSE THE SERVICE GAP.
2. REDUCE CUSTOMERS' EFFORT THROUGHOUT THEIR FULL SHOPPING EXPERIENCE TO BUILD LOYALTY.
3. SOLVE PROBLEMS IN A SINGLE, FRIENDLY, CONVERSATION TO PREVENT CUSTOMERS LEAVING.

\*FOR AMBITIOUS ONLINE STORE OWNERS WITH A KICK-ASS BRAND

### Applying the principles of great customer service

#### 1. Purposefully build knowledge about customers' needs and expectations to close the service gap.

To paraphrase Henry Ford, it's the customer who pays the salary. Make every service interaction an opportunity to learn about your customer. Gather, organize, and use that information.

## **2. Reduce customers' effort throughout their shopping experience to build loyalty.**

Customer service is not just about solving problems. It's about making the customer's entire shopping experience as effortless as possible. When making any decisions about your store, always remove obstacles. Do not add new ones.

## **3. Solve problems in one single, friendly, conversation to prevent customers from leaving.**

84% of customers want their problem resolved in one friendly service conversation<sup>11</sup>. They also want to feel confident they won't have to come back. First-call-resolution has moved to a whole new level.

Our next step will be to take a look at your manifesto — a clear declaration of intent to the outside world. With a strong manifesto, customers understand who you are, what you stand for, and know exactly what to expect from you.

## Endnotes

- 1 <http://www.brainmates.com.au/brainrants/the-customer-service-gap-model>
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## CHAPTER 2

# How To Develop a Customer Service Manifesto

## 2.1

# Create A Manifesto To Set Customer Expectations

Regardless of how today's online shopper arrives at your web store — whether by advertisement, referral, or word of mouth — they take a moment to size you up. They're wondering, "Who are these people? Can I trust them? Should I buy from them?"

In making their determination, one of the first places potential customers check out is your About Us page. No doubt, you have your text in place — probably a short story about your beginnings, people, products, brand, and/or philosophy. And that's a good start.

However, if you want to set clear customer expectations, then a brief but strong manifesto is the way forward. After all, managing customer expectations is half the battle in meeting them!

Your manifesto should cover the following three aspects of your business:

- The core of your brand — what you stand for.
- Your value proposition — why customers should buy from you rather than someone else.
- Your service ambition — what customers can expect when they do business with you.

Here's a neat example from Everlane<sup>1</sup>. It can be found on the About Us section of their website.

— introducing —

# Radical Transparency

Know your factories. Know your costs.  
Always ask why.



## KNOW YOUR FACTORIES

We spend months finding the best factories around the world—the very same ones that produce your favorite designer labels. We visit them often, and build strong personal relationships with the owners.

This hands-on approach is the most effective way to ensure a factory's integrity. As an added assurance we also require stringent workplace compliancy paperwork.



## KNOW YOUR COSTS

We believe customers have the right to know what their products cost to make. At Everlane we reveal our true costs, and then we show you our markup.

In traditional retail a designer shirt is marked up 8x by the time it reaches the customer. By being online only, we eliminate brick-and-mortar expenses and pass these savings on to you.



## ALWAYS ASK WHY

We constantly challenge the status quo. Nothing is worse than complacency, and as a brand our culture is to dissect every single decision we make at every level of the company.

We know our customers are also rule breakers and questioners, so we hope this philosophy is palpable in the products and choices we make. And by all means, challenge us too.

We think it's great. Short. Clean. And crystal clear.

We're going to help you craft a strong (and short!) manifesto you can slip into your About Us section right away. So if you're ready, grab a pen and paper. We're going to be asking questions! (You can also download the template at the end of this chapter and take your time.)

## 2.2

# The Three Elements Of A Customer Service Manifesto For eCommerce

If you already have a short brand statement, great. Struggling to determine what a brand statement is?

It's the one big statement about your brand that you believe makes you stand out from all the others! Try filling in the blanks in this statement: "Here at ..... we believe that ..... and that's why we do what we do."

Write that down. You can follow the above or create your own in 50 words or less. Not quite there yet? Take a look at Marty Neumeier's classic presentation on branding<sup>2</sup>. Now, think about the following:

- What was missing in the market that triggered you to set up your store?
- What are you most passionate about?
- Why did you choose your product rather than something else?

It might take a little crunching, but once you have defined the one big reason your brand exists, then it's time to look at your next big statement — your value proposition.

## What's your value proposition?

When online shoppers visit any online store they have a set of expectations in their minds. And they are looking to have the following questions answered before they decide to buy:

- Does the price fit my budget?
- Is this the right product for me?
- Can I get it when I need it?
- Do these people look like they will take care of me?

To help answer those questions you will need to write out a short statement that covers each one. So again, in as few words as you can manage, try answering each of the following:

- Price: What is your single strongest price advantage?

- Product: What is your single biggest product benefit?
- Service: What is your single strongest service advantage?
- Delivery: What is your single biggest delivery advantage?

Remember that Everlane example we looked at earlier? Take another look. The company manifesto focuses on two main elements: Price and Product. Everlane covers both of those things very clearly, so there's no guessing about their



company focus. That's the kind of thing we're getting at here.

The third statement Everlane makes — “Always ask why” — appears to be partly about customer service, partly about them. It's their “customer service statement,” and it's a good statement, but we think it could be better. And that's what we tackle next...

## What's your service ambition?

The last big statement we are looking for is most closely tied to your customer service promise. This will set very clear service expectations. So be certain you can consistently deliver on this one — every single time!

The key question to ask yourself is where is your customer service strongest? Is it in terms of:

- Response time?
- Return policy?
- Resolving issues in a short timeframe?
- A personal, human approach?

If you already know your one big customer service advantage, then write it down — yep, again, in 50 words or less.

If you are struggling, take a look at the points below. Think about where you get the most compliments. If you base your big service statement on that, people will see the proof in your loyalty seals and feel it in every service interaction.

- We are always super-friendly and positive!
- We promise to listen to all your concerns.
- We are always easy to reach.
- We promise to resolve all your issues, no matter what it takes.
- We will admit when we made a mistake.
- All our team are fully empowered to do whatever it takes to make you happy!

Now that you have your last big statement for your manifesto, we can put them all together.

## 2.3

# Putting Your Manifesto Together

By now you should have (at least!) three big statements that are the basis of your manifesto. Those statements should explain:

- The core of your brand — what you stand for.
- Your value proposition — why customers should buy from you rather than someone else.
- Your service ambition — what customers can expect when they do business with you.

Once you put them together, it's about getting them out cleanly. Be sure to keep your tone and style simple.

Making it short may take some time and a few rewrites, but when you get it right, people will remember it — and know exactly what to expect from your company. And a manifesto people remember is the very best one you can have.

[Template]

## Endnotes

- 1 <https://www.everlane.com/>
- 2 <http://www.slideshare.net/coolstuff/the-brand-gap>

## CHAPTER 3

# Refreshing Your Customer Service Strategy

## 3.1

# The Four Pillars Of Good Customer Service Strategy For Online Stores



It's a great feeling to realize you aren't a startup anymore but an honest-to-goodness happening e-commerce site. We salute you! The majority of online stores never get this far.

By now, you have all the essentials in place: A great brand. A strong team. Your product is rocking. Core processes are solid. You've got the right fulfillment partners and suppliers. Your team is savvy. And, finally, revenues are looking more predictable.

Now, the fun begins. It's time to think about scaling. To do that, you need a strategy and to be certain all your customer service activities work together toward a more profitable website.

We're going to help you build your strategy. A scalable strategy that fits your store and your needs. To do that, we start with "Four Pillars"—upon which that strategy will be built.

*"A good customer service strategy should balance costs, quality and revenues [to create] competitive advantage."*  
- McKinsey

First things first: Before you answer the below questions, take a moment to think about them. The goal is to help you take a more objective look at the value customer service currently adds to your online store.

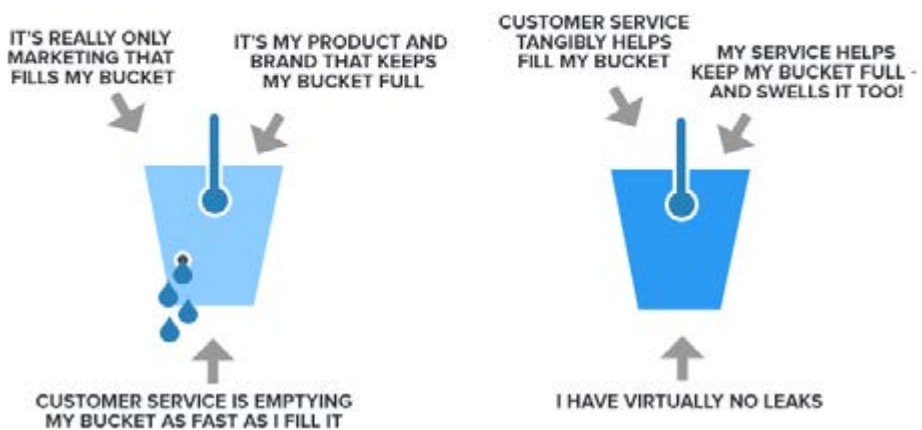
- Acquisition: Is your current service strategy helping you get more customers? Are you sure? Can you measure it? Could it be better?
- Retention: Is your current strategy not just keeping customers but also improving loyalty and customer lifetime value?
- Efficiency: How much of your web store budget does customer service take? Do you use customer feedback to optimize or improve internal processes?

*“An average company loses 10% – 30% of its customers annually”  
- McKinsey*

In other words, ask yourself what sort of role your customer service currently plays in your web store.

Take a look at the below image. The “leaking bucket” concept models a business as a bucket and customers as the water in the bucket. Therefore, a leaking bucket refers to a business that is losing customers and market share.

## WHAT ROLE DOES CUSTOMER SERVICE CURRENTLY PLAY IN YOUR ONLINE STORE?



Is your store the bucket on the left? The one on the right? Or somewhere in-between?

As a small business owner, your ultimate responsibility is to help focus your customer service efforts on the things that will get the business results you (and perhaps your backers) are after. That's what our pillars will help you with.

## **THE FOUR PILLARS OF GOOD CUSTOMER SERVICE STRATEGY FOR ONLINE STORES**



They are as follows:

- Removing customer obstacles means reducing the amount of effort a customer has to put in throughout their full shopping experience. This will improve conversion rates and build loyalty.
- Improving soft conversation skills & forward-resolution means helping your team build stronger emotional customer connections and head-off the next issue. This will stop churn, build loyalty, and reduce costs.
- Gathering operational insights means using customer support conversations to help optimize internal processes, better manage your team, and make smarter operational choices. This helps improve profitability.
- Gathering competitive insights means using customer support conversations to help identify more up-sell, cross-sell, and assortment opportunities to keep you one step ahead of the competition.

## 3.2

# Removing Obstacles To Customer Effort Really Gets Results



Removing customer obstacles means reducing the amount of effort a customer has to put in throughout their full online shopping experience. This will improve conversion rates and build loyalty.

*“The gold of customer service and experience is in fixing the mistakes, the grips, and the average. It may not be sexy, but it’s more likely to be effective and deliver returns.”*  
- Forbes, 2014

This is the first of our strategy pillars. Why? As we explained when busting customer service myths, 96% of customers who feel they put a lot of effort into their purchase end up being disloyal — whether they love your product or not!

On the other hand, only 4% of customers who have to put in just a little effort to make their purchase leave for a competitor. So making it easy for your customers really gets results.

The same principle applies to your user experience and communications too. Brands that simplify customers’ decision-making processes<sup>2</sup> are 86% more likely to be purchased and those brand loyalists are 115% more likely to recommend you.



The bottom line is that when you make it easy for customers, they convert better, spend more, and they're more likely to recommend your product(s) too. Reducing customer effort is where you will get maximum ROI across the board.

*"The fire of purpose easily melts the icicles of obstacles."  
- Alan Cohen*

## Where to start

The first step in removing obstacles for your customers is knowing where those obstacles are. In 2013, the Corporate Executive Board offered this free audit tool<sup>3</sup> that helps identify the "high-customer-effort" areas in your web store.

It's free to use, but it's quite a beast to handle. If you are down with Net Promoter Score<sup>4</sup>, and have a spreadsheet guru on your team, that too could be an option.

But if you're not ready to go whole hog, but still want to pilot the concept, check out our questionnaire below. We've simplified the audit and focused it on the full customer journey, from pre-sales to post-sales. You can download the at the bottom of the page.

We suggest creating an online form to be sent via e-mail or any other information gathering channel you feel works best (e.g., a poll, data collection app, etc.)

Once you have the results of your questionnaire, you should have a much clearer idea of where your customer has to put in the most effort. Knowing this, you can confidently focus your efforts in the right place for the best return.

# Template: The simple survey question to help focus your loyalty strategy

Dear [Insert name],

Thank you for shopping with us. We hope you are enjoying your [Insert product] to the fullest!

We at [Insert brand] want to make your shopping experience as easy as possible. So we'd like your help. This questionnaire will only take a moment.

How much effort did you have to put in to shop and buy from

|                                 | Virtually none, it was super simple! | A bit, but not too much, thanks. | Far too much, actually. |
|---------------------------------|--------------------------------------|----------------------------------|-------------------------|
| ...While choosing your product? |                                      |                                  |                         |
| ...While making your purchase?  |                                      |                                  |                         |
| After your purchase?            |                                      |                                  |                         |

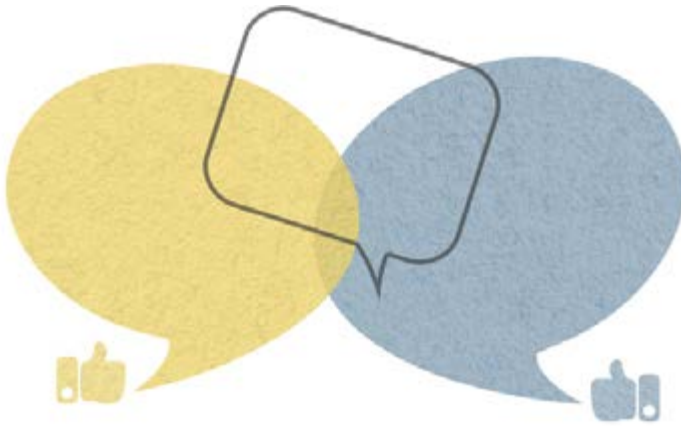
Other comments are welcome too!

Thanks once more for shopping with us. We look forward to seeing you again.

[Insert your name]

## 3.3

# Improve Soft Skills And Forward Resolution To Increase eCommerce Profits



Improving soft conversation skills & forward-resolution means helping your team build stronger emotional customer connections and head off the next issue. This will stop rising customer churn rates and build loyalty while reducing costs.

*“A 5% reduction in customer defection can increase profits from 25% to 80%”  
- McKinsey*

Soft skills and forward resolution is the second of our four strategy pillars. We'll take a closer look at how soft skills stop customers from leaving. Yes, it's customer service that is best for this, but you need to give clear direction to your team and be confident that direction will fix that “leaky bucket” in the most cost-effective way possible.

We'll cover how and why the solutions lie in stepping up the soft skills of your team, refocusing them on “Forward Resolution” rather than “first-call resolution.” But before we get there...

## Mind the gap!

Remember the customer service gap? Pushing your front line to create “delight” can be dangerous. Trying to exceed expectations — by offering a refund, free product, or shipping — gets you virtually no more loyalty benefits than meeting them.

*“84% of customers want their problem solved in one single, friendly conversation — and none of them want to have to come back again!”  
- Corporate Executive Board*

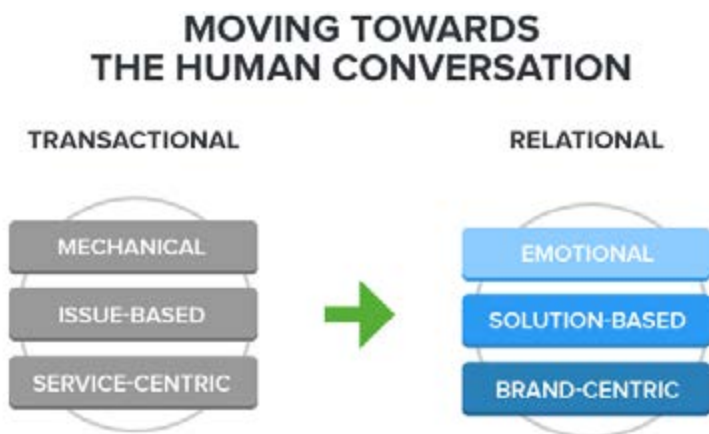
In an effort to manage their busy operation, many team leaders push their teams to lower call time. The rationale being that resolving a customer’s problem quicker makes for happier customers.

Whereas what 84% of customers really want<sup>5</sup> is this: to have their problem solved in one single, friendly, personalized conversation. And none of them want to have to come back again!

There are two parts to this. First, the friendly, personalized conversation. And second, the Forward Resolution thinking that not only resolves their current issue but ensure they won’t have to call again in the future.

## The Human Conversation

The first part of what customers really want is what we call The Human Conversation. In our roadmap to great Conversation, there’s more. But, for now, here’s an introduction and some tips to get you started.



For the most part, customers feel that they are being “dealt with” rather than appreciated. That makes people really grumpy. Here they are spending all their hard-earned time researching and buying the product they’re after. But then, when they have a problem or a question, they need to get in line and wait to be served. Not really listened to, not taken care of.

We’re sure you’ve experienced it yourself.

What customers really want is to feel as if they are being listened to. Understood. Placed in confident hands. They want a personalized service. And they want to feel 100% certain you will follow through on your promises.

When you do that, you are delivering what we call a truly Human Conversation. To get there you need to move your service conversations from “transactional” ones to “interaction-based” ones.

How will this help you? Well, this Harvard Business Review study showed that almost 25% of repeat calls<sup>6</sup> came about because of “emotional disconnect” between customers and reps. That disconnect happens when the customer didn’t trust the rep’s information. Didn’t like the answers given, or had the impression the rep was just hiding behind some sort of policy thing.

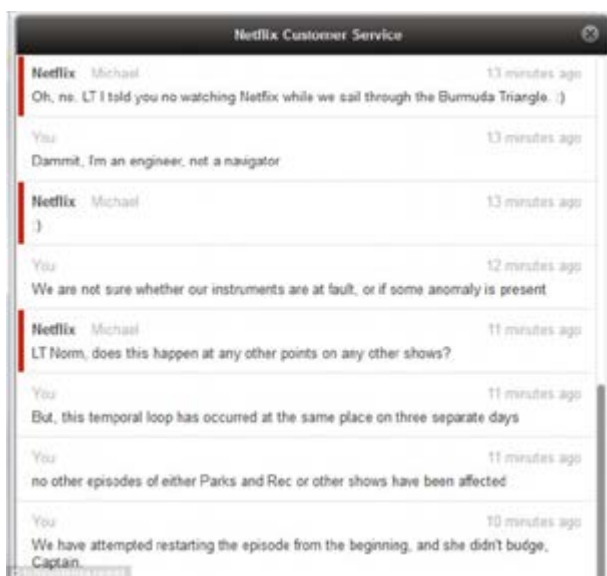
So stepping up the emotional connection could at the very least reduce 25% of your repeat calls. Plus, as you are focusing on exactly what your customer wants, you’ll increase customer satisfaction levels — and reduce your churn rate.

*“With some basic instruction, reps can eliminate many interpersonal issues and thereby reduce repeat calls.  
HBR, 2012*

With some dedicated effort from you on your team’s soft skills (there’re some tips below), we’re confident you can step things up quickly and start to see immediate results.

And remember, it’s unlikely bigger brands will ever get their act together enough to offer their customers as much love and attention as you can (although they are checking it out<sup>7</sup>). So this approach could really be your competitive edge!

Before we give you some tips on how to get started, you must check out the full transcript from Captain Mike’s awesome 2013 Netflix service conversation<sup>8</sup> that’s still getting PR today. That’s probably the ultimate Human Conversation.



## Tips to get you started

- LEARN: Marriott Hotels (known as a service leader) use this acronym to help their staff deal with general questions: L.E.A.R.N.: Listen, Empathize, Apologize, Respond, Notify (others so that problem does not crop up again)
- LAST: When dealing with complaints, many other companies use the following one to deal with complaints: L.A.S.T.: Listen. Apologize. Solve. Thank (the customer for bringing the issue to your attention).

Once you have helped build your front line's soft skills, they will be much more comfortable in tackling the second part of your customer's biggest wish — not having to come back!

## Heading Off The Next Issue

Take First-Call Resolution (FCR) to a whole other level: Forward Resolution heads off the customer's next issue. So we're not talking about the length of, for example, Zappos' now legendary 8 hour conversation<sup>9</sup>!

What we're talking about is the quality of the conversation that both solves the customer's problem as quickly as possible, and heads off the next one —and it doesn't have to take 8 hours!

## Where to start:

- First — track repeat customer contacts. We suggest doing it in a chunk of 14 days. If you use FCR as a measure, this will make them initially look very bad. Here, we try to reduce customer effort. Once you have identified your repeat contacts, it's time to take closer look at them. How?...
- Second — Identify relationships between products and questions. If, for example, you have a particular product which results in a lot of “How do I?...” calls, the next time someone buys that particular product, have your team offer a quick tutorial before the order is put through (or subsequent to it). This Forward Resolution will help you reduce customer churn rates and make for happier customers.

*“Focusing on lowering call time will not help you reduce future workload. Heading off the next potential issue will!”*

## Putting It All Together

To sum up, here's what you need to do to make certain your soft skills and Forward Resolution strategy pillar is rock-solid:

1. Step up the soft skills of your reps to improve the emotional connection with your customer:

- Apply LEARN: Listen, Empathize, Apologize, Respond, Notify.
- Apply LAST: Listen. Apologize. Solve. Thank.

2. Refocus your team on forward resolution:

- Track repeat customer contacts
- Identify relationships between products and questions
- Add these insights into your service interactions.

The longer you do this, the lower your future workload will be. What this also means is you're helping reduce customer service costs every step of the way.

It's quite a powerful formula! And that's why it is the second pillar of our good customer service strategy. The next pillar is Gathering Operational Insight. Let's take a look at what's involved...

## 3.4

# Using Customer Support Conversations To Gain Operational Insights



Gathering operational insights means using customer support conversations to help optimize internal processes, better manage your team, and make smarter operational choices. This helps improve profitability.

Once your team is connecting emotionally with customers, and you are heading off your customer's next problems in a single interaction, your leaky customer service bucket is well on the way to being patched!

But when you are focusing so heavily on the customer, it's easy to lose track of the overall costs involved. If you want to keep your web store in good shape, and to scale, then you need to make certain your operation is as efficient as possible.

That's what this third strategy pillar is all about. Our goal here is to help you lower costs, make process improvements, and better manage your team — so when you really hit the gas on scaling, you're in great shape.

The very first step toward cutting customer service costs is to identify your single biggest source of complaints and questions — this will tell you where you should establish what we call your customer service “defense line”.

Then, in your second step, strengthen that defense line, stop those same issues from coming up in the future. This is what will help you cut costs!

Now, let's focus on your defense line.

*“Only 33% of companies use customer feedback to improve organizational efficiency.”  
- Forrester*

## Finding and Strengthening Your Defense Line

In our experience, most customer service teams put a huge amount of effort into reducing the number of complaints (or questions) in their inbox but a lot less effort into tackling the source of these problems.

This often leads to a lose-lose situation — for you, your team, your customer, and your future customers too. The irony is that the majority of the complaints that land in your inbox are avoidable. That's where the defense line comes in.

Your defense line should be built around the single biggest source of your complaints (or questions). This will vary depending on whether you offer a super-hot sauce<sup>10</sup>, vintage clothes<sup>11</sup>, or gorgeous jewelry<sup>12</sup>.

However, this report from the European Consumer Centre<sup>13</sup> (ECC) states that 80% of all complaints are related to product, payment process, terms and conditions, and delivery.

- Based on that ECC list, that would mean, for example, you need to:
- Ensure you have full product specifications on your product pages
- Include the full price — including shipping
- Make certain delivery time is crystal clear
- Simplify terms and conditions
- Be sure the return policy is visible at a glance

There's more detail on optimizing your product page as defense line here. But once you have made the first steps on your defense line, you are already on your way to reducing the overall costs of your customer service.

To sum up: a profitable web store uses its most valuable source of information (its customers) to gather insights which make for a more effective operation. That's why it is our third strategy pillar.

## Tips

- Keep a close eye on returns! By looking out for repetitive complaints in the color of a particular product, for example, you may be able to identify an issue with the photos depicting the product on the web page. Being aware of this, you not only fix the photos but reduce customer service complaints, and increase revenues, in the future. Simple. But smart.
- Look out for stock-related issues. If you carry inventory, you know all about having to manage costs. By tracking customer questions or complaints on items not being in stock, for example, you gain insights into managing both costs and improving turnover. The same applies when you have a fulfilment partner. By monitoring the same questions and issues, you can find the right balance between carrying stock and missing out on sales.

## 3.5

# Using Customer Support Conversations To Identify Sales Opportunities



Gathering competitive insights means using customer support conversations to help identify more up-sell, cross-sell, and assortment opportunities to keep you one step ahead of the competition.

The last of our strategy pillars is probably closest to your heart. When you started your company, and built your online store, you fell in love with a product, crafted your brand, and set up your store around both of them — not around customers.

But over time you've grown to know those customers better — they're more demanding and have more choices too. If you can better understand what makes your most loyal customers fall in love with your brand, you can add complementary products, accessories, or even expand your range — knowing that you already have a proven market.

This strategy pillar will help you gain insights from your most loyal customers to inform your choices on the development of your products and its add-ons. We'll start by taking a look at “personas”.

## Tackling Personas

A segmentation is not the same as a persona. You've probably already

segmented your market with your marketing expert or team, so you can get your marketing nice and targeted.

But as we know, no matter how well we segment, every customer is unique. That's reflected in their buying habits. And these can be difficult to predict.

If you have an online fashion store, for example, you'll know some customers buy expensive designer dresses, others just buy a few accessories. Some stay, some go, never to return. Until they do.

The purpose of personas is to try and understand why people act the way they do. A richer understanding of people's needs, behaviors, and aspirations will help you better understand why people fall in love with your brand.

*"Minute particulars are essential. God save us from  
vague generalizations!"  
- Anton Chekhov*

There's loads of advice on how to develop a persona: from hubspot<sup>14</sup>, volusion<sup>15</sup>, imagedmedia<sup>16</sup>, and more<sup>17</sup>. But! In the tradition of the myth-busting we covered earlier, we have an alternative thought we'd like to share...

The common approach to personas is to create a fictional character that you use to represent the essence of your most ideal customers.

But we think the best way to approach personas in this case is to create a 'persona'-type profile of your actual customers — the ones who know you, your product, and your brand best.

## Where to start

If you have a full-on customer lifetime value segmentation done by a financial guru, then that would be the best place to start. If you already have a good segmentation, it's worth identifying two or three personas for each segment.

As you've been around a while, we bet you already have close contact with some of your best customers. So you could also start there. Once you have identified your starting point, it's all about the human conversation.

*"By understanding why your customers act the way they do, it becomes easier to understand what they will value."*

Your goal is to gain understanding of why your most loyal customers think and act the way they do. You want to understand the context in which they make

purchase decisions, not why they love your brand.

Choose a few customers and create a Word or Excel document in which you can develop a profile about these customers. What they purchase, when, and other information you feel is helpful.

Build these profiles up over time. When you have a good understanding of who each customer is and how well they represent their segment, let it all sink in, and then consider next steps...

Look for commonalities. Trends. Similarities in your most loyal customers. Once you get a feel for why your customers act the way they do, it becomes easier to understand what they value from your company and your store. That should lead to insights which will keep you ahead of the pack.

To summarize:

1. Focus on your most loyal customers.
2. In your service interactions find out what they really want, what they really value, why they value it.
3. Create personas from them; not fictional but real — your most loyal customers.
4. Use those insights to inform your marketing activities & assortment — being sure you will have a ready-to-buy market.

In addition to gaining insights through service interactions, you can also consider surveying your most loyal customers.

Tailor some survey questions with your brand. Below we've come up with 10 suggestions to help you get down to the core of your customer's behaviors. You can develop any questions which suit you; these are merely meant as inspiration.

- What have they bought recently from other stores
- What kind of cell phone do they have?
- Do they have any cool new apps?
- What other brands do they love?
- What's their favorite music?
- What's their favorite film?
- Who are their heroes?

- What's their ideal vacation spot?
- What is their biggest ambition?
- What are their hobbies

Once you have determined the questions which will serve your needs best, compile them in a brief survey, and send that survey out to your most loyal customers.

## Tips

- Who is your rep with the very best soft skills? Ask that person to take the lead in developing personas. Once you know who you will use in your personas setup, there's a good chance you can answer some of those questions. Have your rep supply you with the results and share them amongst your support team! See who already knows what about whom.
- Involve your marketing team. Anything that contributes to better or more detailed segmentation will be welcomed by marketing. Sharing these customer behavioral insights could help inform your marketing communications (such as how you contextualize your products on your site) or even lead to more targeted advertising, PR, or other marketing ideas.

## 3.6

### Strategy summary

Your online store is where it is today because of all the hard work you and your team have put in. You've most likely developed your knowledge and experience by solving problems, getting hands-on, and determining the best route as you go.

With so much information out there, it can be hard to figure out who to trust when looking to scale. With this guide to setting strategy, we wanted to give you some solid pillars to lean on — each one built on solid research.

#### THE FOUR PILLARS OF GOOD CUSTOMER SERVICE STRATEGY FOR ONLINE STORES



#### THE THREE PRINCIPLES OF GREAT CUSTOMER SERVICE

We'd love to know what you think about these pillars. Do they help give you a clearer focus for your service strategy? We're always happy to chat.

## The four pillars of good customer service for online stores

- Removing customer obstacles means reducing the amount of effort a customer has to put in throughout their full online shopping experience. This will improve conversion rates and build loyalty.
- Improving soft conversation skills & forward-resolution means helping your team build stronger emotional customer connections and heading off any further issues. This will stop rising customer churn rates and build loyalty while reducing costs.
- Gathering operational insights means using customer support conversations to help optimize internal processes, better manage your team, and make smarter operational choices. This helps improve profitability.
- Gathering competitive insights means using customer support conversations to help identify more up-sell, cross-sell, and assortment opportunities to keep you one step ahead of the competition.

## Endnotes

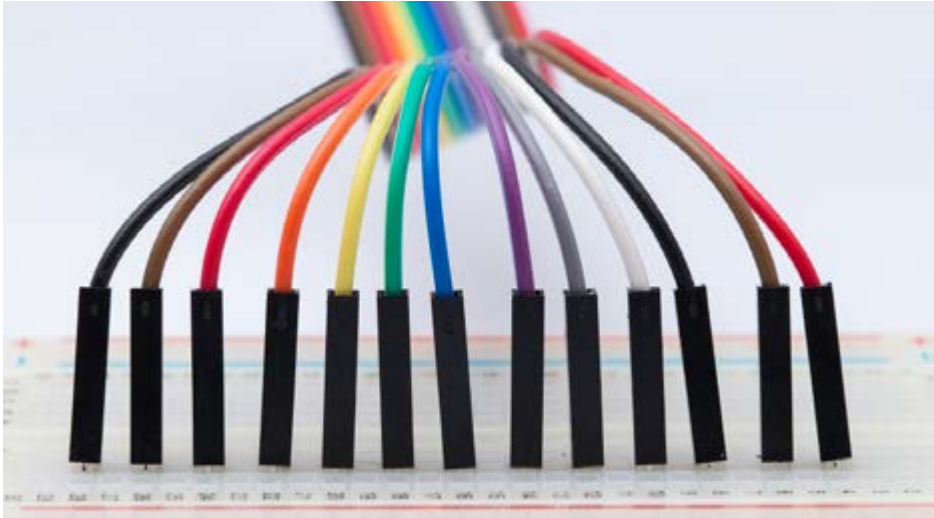
1. <http://knowledge.sagepub.com/view/key-concepts-in-marketing/n5.xml>
2. <http://www.executiveboard.com/exbd/marketing-communications/decision-simplicity/index.page?>
3. <http://www.executiveboard.com/exbd/sales-service/customer-effort/index.page>
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## CHAPTER 4

# The Great Customer Service Model

## 4.1

# How to ensure a super-smooth customer experience



Customer service really is the new battleground. We shared what we believe are the principles of great customer service, and the four pillars of customer service strategy will help your online store navigate that battleground.

In this chapter we're going to look at the core elements of a great customer service model.

By “model” we mean all the stuff that makes for a super-smooth customer experience, one that increases satisfaction, conversion, and loyalty. Our goal here is to share with you the absolute must-haves for a great eCommerce store today.

We're going to start with a refresher on UX (user experience) then move onto home-page first impressions. We'll help you optimize your product pages and, after some other stop-offs, end up in metrics land.

With these insights, all of which we show you how to implement, we expect you'll see amazing gains, making your online store even more trusted in its category!

## 4.2

# 11 Key UX Questions eCommerce Stores Should Ask Their Developers



There are a lot of considerations when you're designing your site, but, over time, with the customer service questions you've received, you might have started thinking about what you can do to make your site's customer journey easier. Well, we're going to make your journey to doing so easier for you!

*"No matter how cool your interface, it would be better if there were less of it"*  
- Alan Cooper

As a growing business, your website already has all the basic UX (user experience) goodies in place — from your design to product sorting, guest checkout, order tracking, trust and loyalty seals, fully responsive design; it's probably mobile-friendly too.

*"76% of all customers say their biggest need in a web store is that it makes it easy for them to find what they want!"*  
Mike Volpe – Hubspot

You should also have a good grip of your personas and their needs, and perhaps you even added the new features, tools, categories, and products your customers require.

However, such improvements can often end up creating an unnecessarily complex customer journey that seriously impacts your bottom line, and overly complicated UX means less effective marketing, less conversion, retention, and loyalty.

As such, we're going to help you revisit your UX with the intention of making it simpler by first removing obstacles to a seamless customer experience. Next we'll focus on improving flow to help drive your customers' decision-making process.

## Reducing effort, guiding decision-making

There are two main goals of your web store's UX: To reduce the amount of effort it takes for a customer to shop and to actively drive the decision-making of your customers toward a purchase.



What can you expect if you were to make just a 20% increase in “decision-making simplicity”? The Corporate Executive Board says you could potentially:

- See a 96% percent increase in customer loyalty
- Become 86% more likely to have your goods purchased
- Become 115% more likely to have your website recommended to others

We’ve created a list with key UX questions for your developer to help you both streamline your UX for a simpler — more seamless — customer experience.

## 11 key UX questions eCommerce stores should ask their developers:

1. Can we simplify our overall site structure so that it’s more intuitive?
2. Can customers navigate backwards and forwards via “breadcrumbs” without losing information?
3. Can we simplify filtering and sorting of products to make search quicker?
4. Can we add swatch colors?
5. Can we add video product demos?
6. Can we show related products, up-sells, and cross-sells on the same page?
7. Can we add real-time inventory tracking?
8. Can we let customers buy without creating an account?
9. Can we make checkout a single page?
10. Can we add inline field validation to our forms during checkout to reduce error rates and abandonments?
11. Can we clearly show all fees in the shopping cart?

These are great questions to ask your UX expert at any stage of your small business. And when you ask these questions, what should you expect from your developer in return? Where appropriate, your expert should suggest one or more of the following:

- Removal of unnecessary and redundant features or obstacles to your customers’ shopping experience.
- Organization of information in a better hierarchy that focuses your customer on your product strengths.
- Reassignment of features (to drop-down menus for example) to provide only the most needed information that converts better.

- Alterations in information dissemination so that it comes at exactly the right moment during the customer journey.

These four UX solutions for more simplicity<sup>1</sup> come from Alan Cooper<sup>2</sup>. He's an absolute UX guru, and the founding father of visual basic. If you're not familiar with him, your developer should be.

Once your developer has helped make your UX simpler by removing obstacles, you should immediately see a boost in conversions. Your next focus should be a sanity check on overall customer flow to build on these changes.

## Customer flow and conversion sanity check

As a small business owner, you are probably drowning in metrics. And it can be difficult to slice and dice all your available metrics on conversion, bounces, click-through rates, etc., into one simple overview.

If you already have your customer flow in one easy overview, and know where your pain points are, that's great.

If not, we suggest using the tool from [Alwaysbetesting<sup>3</sup>.com](https://alwaysbetesting.com) below. This helps you quickly and easily identify the biggest drop-offs in your conversion funnel. You can add or remove your own steps and take it as deep as you like.

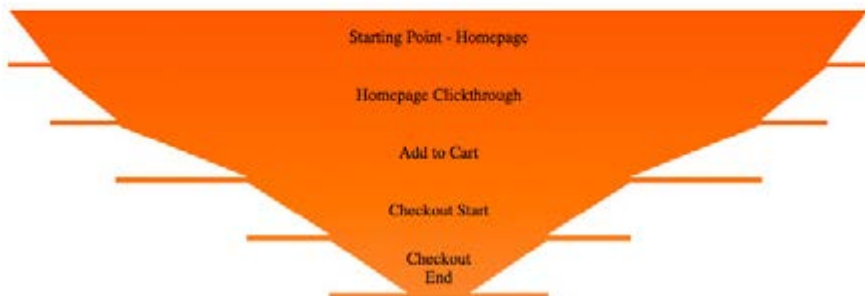
Once you are aware of the biggest drop-offs in conversions, you will have a better understanding of where you can improve. So it's time to start at the top of the funnel — with the very first impression you make on your home page.

With the 10 ways to improve your site design currently under consideration, you might think your site is the best it can be. Not just yet...we want to help you make it even better! The next thing to consider is the proposition you offer your customers and how you position your site and your brand.

# UX AND CUSTOMER FLOW

IDENTIFY THE BIGGEST CONVERSION DROPS IN ONE SIMPLE OVERVIEW

| Step Name<br>click to edit | Conversion %                      | Raw Numbers                        | Manage Steps  |
|----------------------------|-----------------------------------|------------------------------------|---|
| Starting Point - Homepage  | 100%                              | <input type="text" value="1000"/>  | <input type="button" value="++"/>                                   |
| Homepage Clickthrough      | <input type="text" value="66"/> % | <input type="text" value="660"/>   | <input type="button" value="++"/> <input type="button" value="--"/> |
| Add to Cart                | <input type="text" value="33"/> % | <input type="text" value="218"/>   | <input type="button" value="++"/> <input type="button" value="--"/> |
| Checkout Start             | <input type="text" value="58"/> % | <input type="text" value="126"/>   | <input type="button" value="++"/> <input type="button" value="--"/> |
| Checkout End               | <input type="text" value="60"/> % | <input type="text" value="76"/>    |   |
| Total Conversion           |                                   | <input type="text" value="7.6"/> % | <a href="#">Save Model</a>  |



## 4.3

# First Impressions: Is Your Home Page About Positioning or Proposition?



After you've hacked away at the inessentials in UX, and you understand where your biggest conversion drop-offs are, it's time to think some more about how you can best guide your customers' decision-making process.

First impressions count. And the home page is the first place those impressions are made. We know you already have a fabulously clean layout and sharp design in place, so we're going to focus on your positioning and proposition.

As we know, your proposition includes your product, price, service, and delivery. Your positioning, however, is more brand-oriented — who you are, what you stand for, and how you stand in relation to the competition.

The important thing to remember is that when a customer sets out to shop, they begin with fairly well-defined needs. They have a budget in mind, they're clear about the product they are after, the specs, features, and so on. But once they encounter your online store, the stories you tell about your positioning and proposition create expectations. And, as we'll see, they also affect expectations of your customer service.

Most web store owners just do what feels right on their home page, then test and improve, which is ok. But if you want to do it better and faster, then try asking the questions below.

- Goal: What is your most important business goal right now?
- Audience: Who are your key customers and what are their needs?
- Message: What is the thing that will best meet their needs and trigger them toward your goal?

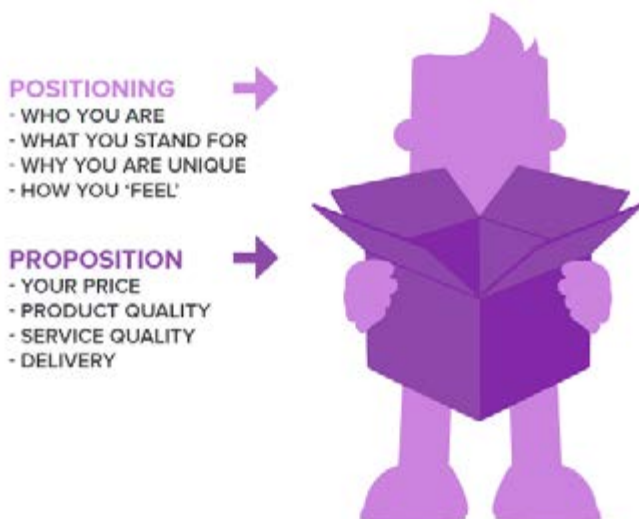
By using that little framework (Goal, Audience, Message) you will be able to sharpen both your positioning and proposition and adapt your home page content accordingly.

The important thing is to prioritize. You can't be all things to all people all of the time. But you can adapt your messaging over time as you change your goals.

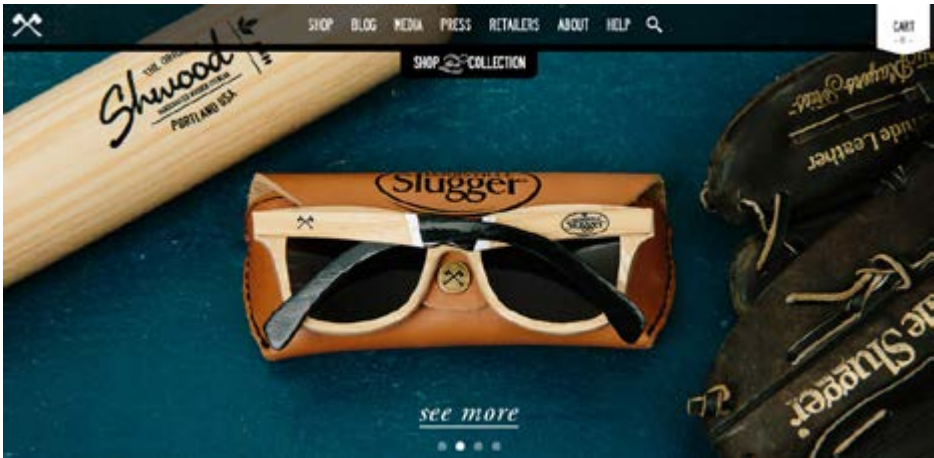
Below there are some great examples from stores across the web. Some focus on proposition, others on positioning — and some mix it up a bit.

When looking at these examples, think about what's worked for you in the past and what hasn't and consider your goals.

## MAKING THE RIGHT FIRST IMPRESSION: POSITIONING OR PROPOSITION?



- Sum-up your whole brand positioning in a single big image, like this example from Shwood<sup>4</sup>, so your customer gets a great feel of your brand values. This is most useful when your market is a higher-end “aspirational product” in apparel for example.



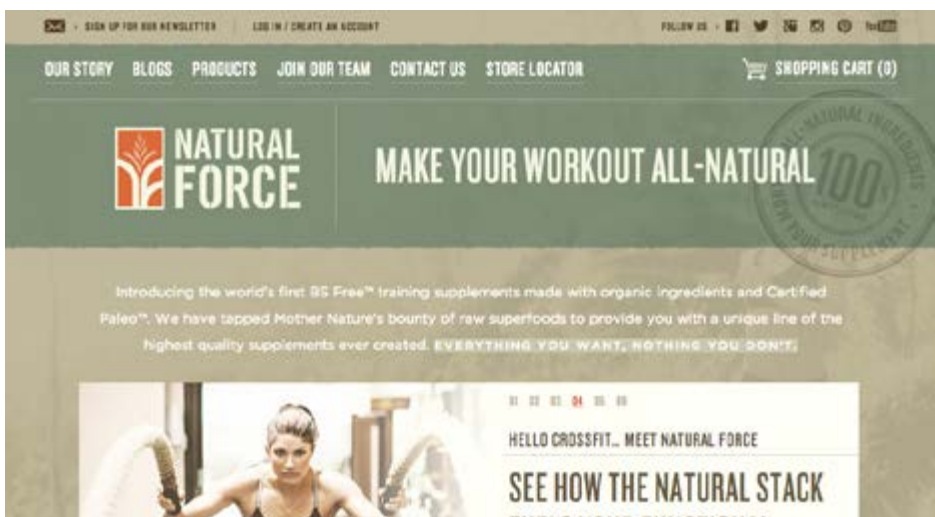
- Immediately focus on features and benefits like in this example from CardinalCase<sup>5</sup>. The customer knows in an instant whether your site has the product they want. This idea is most effective when you are in electronics or offering less expensive, faster-moving SKUs.



- Surprise your customer with a big, quirky personal image, like in this example from Kinkytease<sup>6</sup>. It triggers the consumer to find out exactly who is behind your brand. This is most useful when you have a clearly defined niche audience, and a personalized product, that you totally identify with.



- Communicate a top-line proposition in just a few words, like in this example from MyNaturalForce<sup>7</sup>. This page taps directly into customer needs. It is most useful in highly competitive spaces when the final purchase-decision is in the details of your proposition.



- Hit your customer with an offer they cannot refuse in just a few words, like in this example from Made<sup>8</sup>. Trigger your customers to start shopping as quickly as possible. This is best used when your price proposition is your biggest competitive edge.



Let's back up a moment. None of these examples talk about customer service on their home pages explicitly, right? Yet every single one sets customer service expectations.

If you contacted MADE, you would probably expect a tight, professional service. If you were to contact Kinkytease, it would look like you were in for a fun ride. CardinalCase? Probably good, but not as personal as the Kinky team.

As we said earlier, as a small eCommerce site owner responsible for customer service, it's important to be aware of the expectations your home page creates. That's half the battle in meeting those expectations.

With all of this in mind, we'll move into optimizing your product(s). Don't fear, we won't be reinventing the wheel, we're simply going to focus on key things to keep you on a competitive customer service playing field. And any good team has a strong defense...

## 4.4

# Your Product Pages As a Customer Service Defense Line



The challenge of online shopping is a lack of tactile interaction. Your customer can't hold, try on, try out, or get an in-person feel for your product. But it's your job to make none of that matter and to convert the curious into a customer. Don't worry, it's easier than you think when you know how...

Even though your home page is most important in making those first impressions about your brand positioning and proposition, all the real action happens on your product page.

Customers spend the vast majority of their time on the product page. It's no wonder that this is where sales are lost and won. Everything that happens there is about conversion — the holy grail of eCommerce.

Product pages are also the main source of questions and complaints. But by designing your product pages well, you can keep that inbox under control.

Your product pages are the outermost layer of what we call your customer service's "defense lines." These pages are where you can best manage expectations and prevent unhappy customers while keeping costs under control.

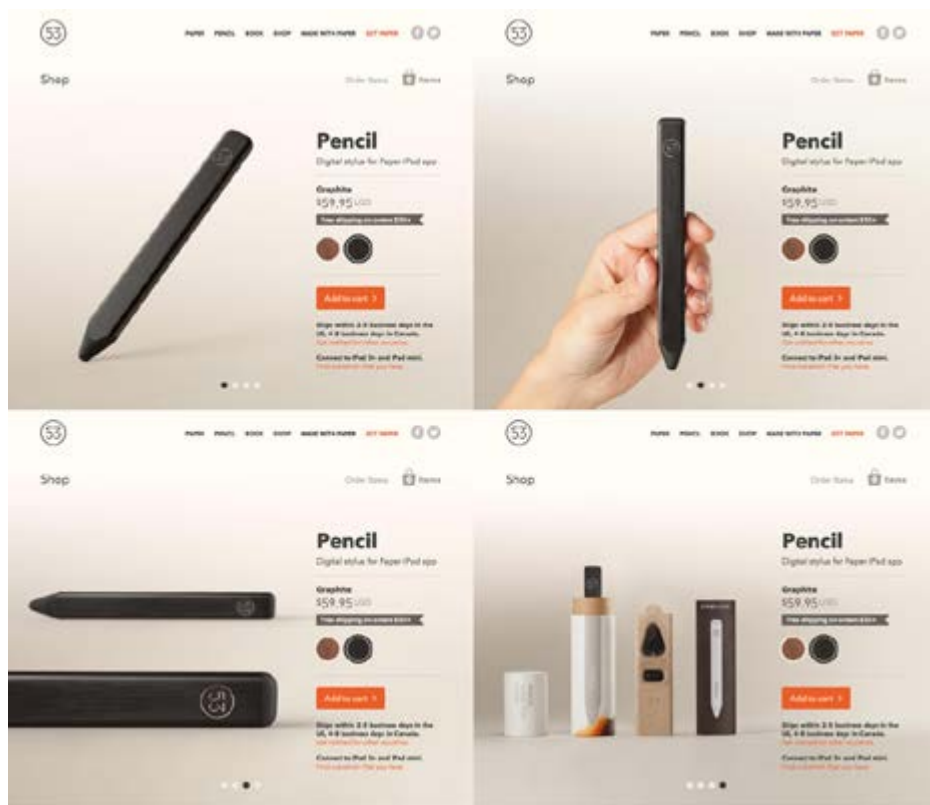
There is a ton of great advice out there on how to best optimize product pages

(here<sup>9</sup>, here<sup>10</sup> and also here<sup>11</sup> for instance). As a growing eCommerce site you already have the basics down, so we're going to focus on just a few of the must-haves that will keep shoppers shopping — and converting!

We're going to pay particular attention to the areas within a website that generate the most questions and complaints, bringing you yet another step closer to reducing your support costs!

## Product images: size, quality, and quantity

Pictures say a thousand words. Cheesy, we know, but true. And the bigger the image, the better the conversion — up to 9% better according to this study<sup>12</sup>. FiftyThree<sup>13</sup> does images (and many other things) beautifully.



But you should never sacrifice quality when utilizing large images. Mismatches in color between images and product lead to unhappy customers — something you want to avoid at all costs.

Multiple images also help. Different angles, zooms, rollover options — they all help shoppers get a really good feel of what to expect when they buy. When you do this well, your website shows quality, care, and attention.

Perhaps the best example we’ve seen of great images is this example from Warby Parker<sup>14</sup> (on Magento<sup>15</sup>). Their images are huge. High quality. And they’ve superimposed measurements when you hover over them too.



In fact, Warby Parker pulls out virtually every image trick in the book. The company allows you to “try on” their sunglasses in a virtual environment by adding your own photo. The site offers multiple views of their glasses too and uses the same background, lighting, and angles in all of their images, that way the store looks fresh and clean.

If you can add a live person demoing your product, that’s even better. It’s often the final purchase-decision trigger. Here’s a great example of that from StudioNeat<sup>16</sup>.

## Product descriptions and specifications: be extensive but smart!

If you’re selling sleeves for a mobile phone, for example, you can easily slip the product specifications into the product description area. But when you’re selling more complex items that have many decision factors, you need to get specific.

This means providing as much product information as you can: full dimensions, weights, materials, colors, cut and fit when it’s clothing, and so on.

However, you don’t want to overcrowd your product page with all of the information in one place. Using drop-down menus or even simple tabs like

Evisu<sup>17</sup> does here is a great solution.



**EVISU**  
**horizontal blue shirt**

US16W08G53100-BLCE

€183.00  
**€129.00**

Size  Qty

**ADD TO BASKET** **ADD TO WISHLIST**

**PRODUCT INFO** **DELIVERY** **CARE** **Size Chart**

This custom made Evisu short sleeve shirt is made in high quality lightweight chambray denim with a block stripe chest and red and white Godhead and paisley print panels. Our signature seagull red stitch logo can be found above the selvedge denim chest pocket.

The Godhead is the smiling figure of Evisu, the Japanese God of prosperity, whilst the world famous seagull logo of Evisu is known as "Kamon" in Japanese, Kamome - Just like the Western tradition of Royal families each owning their coat of arms. Japan also adopted this tradition since early 1870 during the Meiji period, the Seagull being Evisu's very own Kamome.

The loose fit, short sleeve shirt comes with red backed Evisu buttons, Evisu branded patch and red chain stitch hang loop.

- 100% Cotton
- Evisu buttons
- Godhead and paisley print panels
- Selvedge chest pocket
- Signature red stitch seagull logo

Most eCommerce platforms don't have too much functionality to display product specs. If you're on Shopify, here's some good advice on how to add custom product specs<sup>18</sup> to your store.

CardinalCase<sup>19</sup> backs up their products with social proof of satisfaction by putting customer reviews right next to their descriptions. That's something that really builds trust.



**Features** **Tech Specs** [View in French](#) [Twitter](#) [BUY NOW](#)

CardinalCase for iPad 2 is a book style, handcrafted case that integrates beautifully with the technology and shape of the iPad 2 for a secure fit and easy removal. With a magnetic closure activating the sleep/wake function of your iPad 2, five different viewing angles, and a typing angle, this case is loaded with the features you want without sacrificing elegant design.

Traditional book binding materials and a sustainable American Black Walnut frame with cappuccino finish provide protection for your iPad 2. While the CardinalCase surrounds your iPad 2, you are still able to enjoy the entire front display surface and easily access all ports and controls. We also provide a pocket behind the iPad 2 for storing a few business cards or your microfiber cloth, along with a place to put your contact information.

Really enjoying the CardinalCase! Fit is perfect! The case looks and feels great! Love the walnut!

**F. Fennelson**  
Austin, TX

I love it! Beautifully constructed, elegant design. Very secure iPad attachment. Passed the shake test with flying colors. Highly recommended.

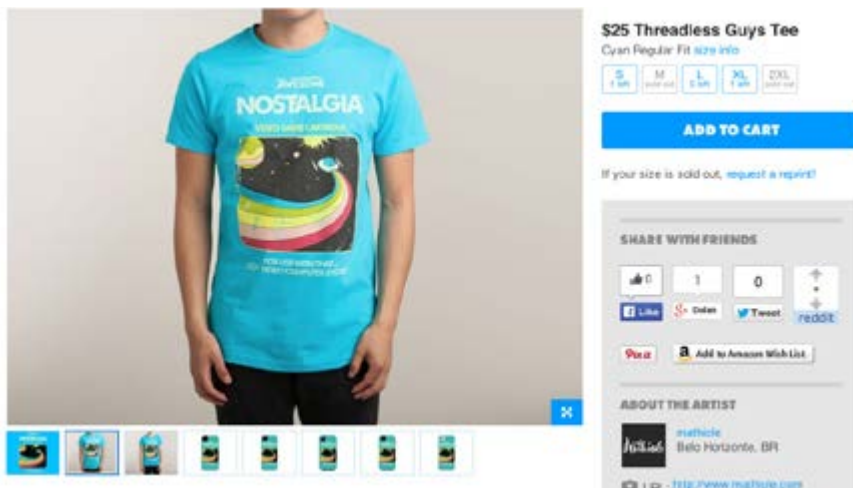
**S. Harrison**  
Seattle, WA

## Stock indication: clearly communicate stock levels per item

Buying a new pair of sneakers generally makes people happy. Finding out the ones you want are not in stock after you've purchased does not.

You can prevent this by clearly indicating if the item is in stock or not. Strangely enough, most e-commerce platforms don't have stock indicators as a standard feature in their basic themes. You can learn more about how different features can stave off customer complaints over here<sup>20</sup>.

When it comes to stock indication, Threadless<sup>21</sup> is right up there. Full stock indication on every size is clear and visible before customers purchase. The only addition we can think of here is to add an "Only two left!"-type of call-to-action.



In a perfect world, as well as informing users when products are going out of stock, you should inform them of when the product will be back in stock as well. It increases the chances of pre-orders!

## Delivery time: clearly communicate the delivery time per item

In most eCommerce platforms you can set delivery times for specific products. Indicating delivery times is, of course, dependent on your carrier. But, above all, you need to be crystal clear about your terms and conditions — pricing, return policy, right of withdrawal, and shipping costs

But you could go even further. If you are on Shopify, check out carrier-calculated shipping<sup>22</sup>. It calculates shipping costs in real time.

## Product Pages Ready!

We've made our way through your product pages, and by now you should feel confident tackling the main source of any questions and complaints.

Now let's help you make certain your contact center rock — complete with an intuitive FAQ, smart searches, and more.

## 4.5

# How To Create Customer Support Content That Rocks

Customer service isn't just about solving any problems customers have, it's about making journey from web surfer to loyal customer as easy as possible. Having all your potential customer's questions answered before they've asked them is the smartest way to do this...

### THE FOUR CUSTOMER SERVICE DEFENSE LINES



When talking about your homepage, we noted that the big messages you communicate there (“free shipping” or “30-day returns” for example) also impact your customers’ service expectations. So it’s important to bear those in mind.

We now know having conversations with your customers is a good thing — unless their questions could’ve been answered even before they were asked.

Essentially, a customer would rather not talk to you. They would much rather find all the answers to their questions on your site itself. Besides, wouldn’t you prefer to focus your resources where they will get the most bang for your buck?

That’s where having strong defense lines comes into play.

We divided those defense lines into four sections:

- Your product pages — often the main source of the (avoidable!) questions that end up in your inbox.
- Your support pages or FAQ — typically the first port of call when a customer cannot find an answer to a specific question on a product page. Also the first stop when a customer wishes to check out your shipping, returns, any other policies, and/or terms and conditions.
- Your knowledge base (or community, if you have one) — where people go to get more tricky or detailed questions answered and customers share their own input.
- Your blog — which, if you manage it well, is where people love to check out all that valuable product- and brand-related content you create to share with their networks.

And why are all these customer service content resources so important? We're sure you already know, but here's a quick stat blast from Forrester Research<sup>23</sup> to refresh your memory:

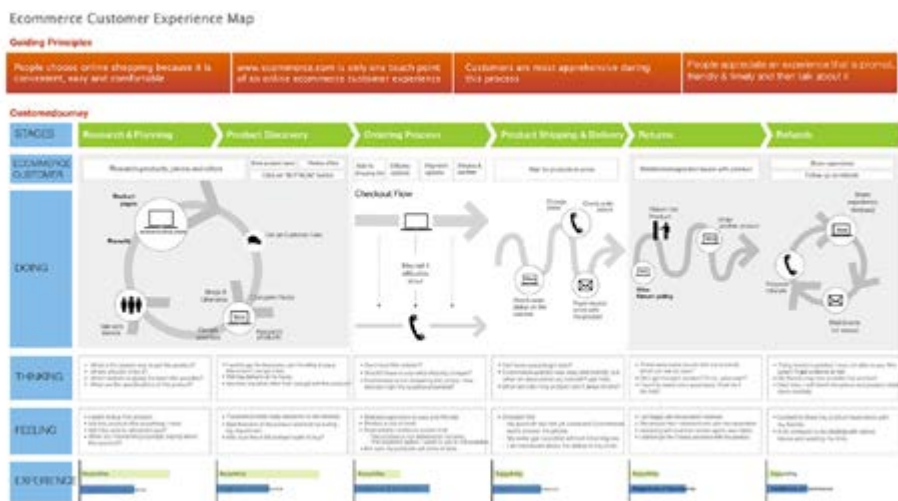
- 71% of customers believe that “valuing their time” is the most important thing a company can do to provide good customer service.
- 52% of customers are very likely to abandon their online purchase if they cannot find a quick answer to their questions.
- Only 52% of customers actually find the information they are looking for.
- And at only a \$0.10 cost per contact, self-service (not having to contact a representative) is by far the cheapest way to serve a customer.

All of which means: If you manage your resources well, and provide your customers with the right answers as quickly as possible, you will improve conversion, keep happier customers, and do it all at less cost!

We're going to look at each one of your content defense lines in turn. And then — at the end of this section — put them back together in one easy task list that will make certain your customer support content is best-in-class!

As we already covered, it's best to optimise your product pages first. Assuming that's done, it's a good time to look at the customer journey in your store. That way we can better understand what questions your customers might have and when.

## Role-play the customer journey



If you already have a map of your customer journey, great. If you are looking to design one, here's a great eCommerce customer experience map<sup>24</sup> you can use as a template. We've simplified the model in the image above to help you better understand the questions that arise in each stage of your customer's journey.

Now it's time for a little role-playing.

The first stage is to go to your store. Try to list the main questions you as a consumer would have. If, at any point, you cannot quickly and easily find the answers to your questions, then you know to make improvements.

If you are struggling to be completely objective, why not grab a friend and ask them to role-play for you? That way, you will be sure to get an objective point of view.

These are your five stages of an online shopper:

- **Research and planning** — Where shoppers browse categories, products, specifications, prices, and offers. While in this stage, people often leave your website to return at a later date and compare your products or prices with those at other sites.
- **Product discovery** — Where shoppers narrow down their search to one or two items, check for hidden costs, look for social proof/reviews, and often check out your policies on shipping, payment options, or your FAQ.
- **Product ordering** — Where people have made their decision to buy,

check out the delivery and payment options, and add their product to the shopping cart just before paying (and thus waiting for their product to arrive)!

- Shipping and delivery — Your customers are now in their holding pattern. They may check their order status on your site or even contact you to change their mind or ask additional questions.
- Refunds and returns — After receiving their product, things may not be as expected. At this point, customers will check your refund and return policy in more detail, contact you, and even share their disappointment!

Now let's take a closer look at your support pages and FAQ and check out the six web store policy basics you absolutely need to have in place.

## Support Pages and FAQ

When customers first encounter your eCommerce store, they think exactly as they do when they visit a brick and mortar store: They check it out to see whether they like or trust you. Your support and FAQ pages help with that.



Many web stores have a simple support page or two which highlights the key points about product selection and key policies. The same with a FAQ — list just a few key points. The whole purpose of a FAQ is that it is solely highlighting your most frequently asked questions about your brand or products.

You would be surprised at how many online shops miss the basics and end up with many avoidable questions in their inbox. To ensure this doesn't happen to you, you need to have the following six policy basics in place:

*“You need to have your six policy basics in place!”*

1. Product FAQ — Where you should state clearly any major ingredients, materials, production methods, or warranties about which customers may have questions.
2. Order Status — Whether it's by track and trace or a simple, automated order status, you need to clearly communicate how you help your

customers track their order. This makes them feel like they are in good hands.

3. Payment and security — Have all of your payment options clearly displayed and any specific terms and conditions that go along with them. Also be sure to mention your SSL certificate.
4. Shipping — Be crystal clear about where you ship to, which courier you use, arrival date, packaging (including surcharges for options if you offer them), what happens if the item is out of stock, and include any details about expedited shipping if available.
5. Returns — Specify your return policy in detail. State the return time and the conditions under which returns can be refunded. Also include packaging in that returns policy.
6. Privacy — In your privacy section state that you treat all data as private and confidential and that you will not share any data (payment, address, etc.) with anyone under any circumstances. This helps build trust.

Once you have clearly covered all these FAQ and policy statements, and made certain that they are easily accessible with a single click, you should be in good shape. If there's anything missing, plug that gap now!

## Knowledge base and community

The majority of online store owners do not have a knowledge base in place. And that's a good thing. In reality, you should clearly answer all your customer questions in your product pages or on your support, policy, or FAQ pages.

We've seen some stores use knowledge bases as a big rug to sweep their customer questions under. Then they let their community sort them out for them. That's the sort of "self-service" you want to avoid at all costs!

*"Treat your knowledge base as a living, breathing thing that needs continuous maintenance. Set regular review dates for each topic and adjust as needed!"*

Remember 52% of customers cannot find the answer they are looking for<sup>25</sup>! So, if you have a complex product that requires a knowledge base, here are five pointers to help make certain that knowledge base is in good, competitive shape!

- Help customers find the right answers. For instance, you can sort your knowledge base by the most popular topics. Or add customer community ratings. Autosuggests are helpful too — they save your customers valuable time!
- Review your articles regularly. Treat your knowledge base as a living, breathing thing that needs continuous maintenance. Set regular review dates for each topic and adjust as needed!
- Create new knowledge base articles based on any new questions that occur or when you introduce new products, terms and conditions, payment methods, etc. Be certain to add them before you introduce the changes; that way you've anticipated customer questions in advance.
- Optimize your knowledge base for all platforms. Including mobile and search engine capabilities! A knowledge base that is indexed by your common search engines will also contribute to your marketing goals.
- Involve your full support team — especially your front line. By delegating and empowering your customer service team to create and review your articles as they encounter new questions, you can be confident you are heading in the right direction.

Managing a knowledge base (whether it's on Desk<sup>26</sup>, Kayako<sup>27</sup>, HappyFox<sup>28</sup>, or elsewhere) can be complex, but when done well, with care and attention, it can also help you better meet customer needs — and reduce your contact costs too.

Now to the final part of your four customer service defense lines (and our personal favorite!) — your blog.

## Blog

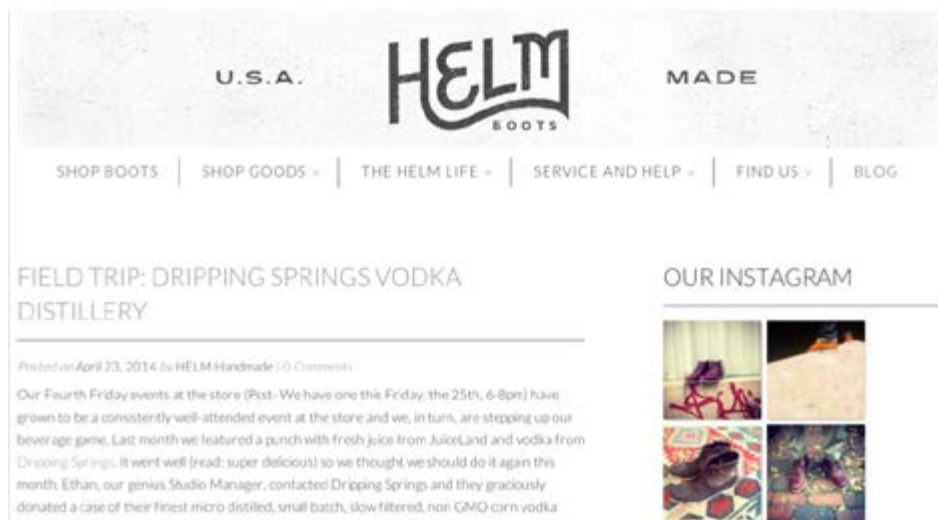
Your web store's blog is the innermost of your defense lines against unhappy customers. Why? A blog can help you answer many of the initial questions customers encounter during the research or product discovery phase of their decision-making process. It can also help build that emotional connection that is so important for today's online shopper.

If you have a blog, this is your opportunity to speak loud and proud about your brand and products. When it is optimized for search engines, and social too, your blog can become a valuable marketing resource.

We're not going to go into too much detail (as this is crossing over into marketing

territory); there are already a lot of great resources about utilizing your blog to improve sales — here<sup>29</sup> and here<sup>30</sup>, for example — so let's just get to a couple of examples...

Helm boots<sup>31</sup> does a fine job of telling the bigger brand and product stories that convince a potential customer they are in great hands. Helm incorporates Instagram<sup>32</sup> and Pinterest<sup>33</sup> and ensures all their content is shareable too.



Pure Fix Cycles<sup>34</sup> is also great. The company's blog is one of the very best examples we have seen that incorporates almost all of the best practices of an eCommerce site blog that really gets it right.

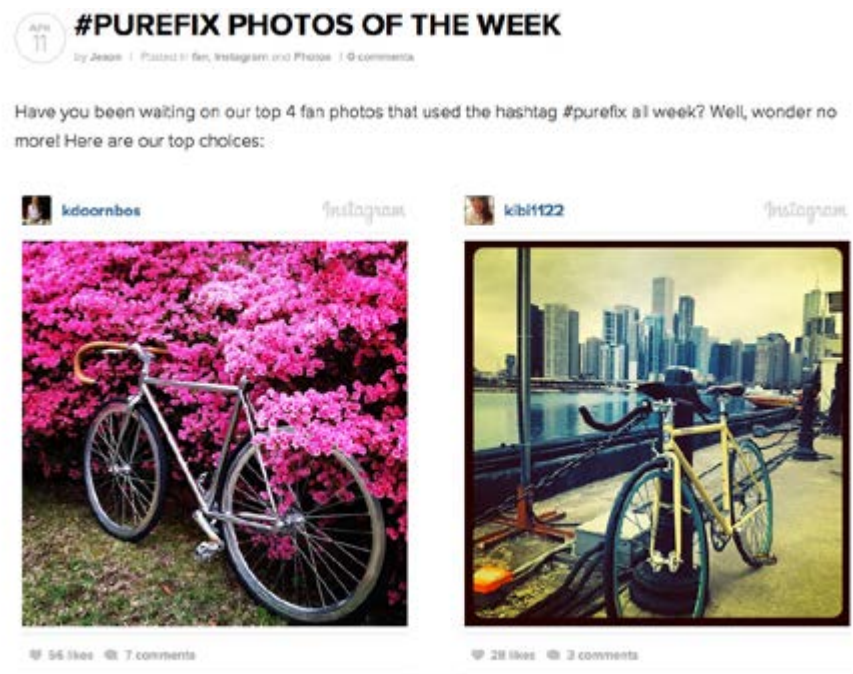
Taking both of these examples into consideration, there are three guidelines to follow when taking your blog to the next level. The goal is for these guidelines to help customers through the product discovery phase of their decision-making journey.

## 1. Establish product-related content themes

If you are selling organic health products, then it makes sense to offer healthy recipes or even fitness tips. If you are in fashion, perhaps cover local fashion events, curate some fashion tips and/or the trends from other blogs. If you are in home and garden, consider exploring related furnishings, accessories, and more.

The key is to tap directly into the aspirations and lifestyle of your customers. Doing this will not only support your brand positioning but also trigger people to

share your content.



## 2. Show your product in context

Videos are a great way to show your product off. They give people a chance to see the product in a more relatable environment. This Hard Graft shoes video is an excellent example<sup>35</sup>. Litter has a good one<sup>36</sup> too. It need not cost an arm and a leg to make a video. With a little editing and a logo on top, even a simple smartphone video can help people feel much closer to your product.

If video is a step too far, then we suggest getting social. Why not encourage your customers to share their own pictures of your product or products? Take the best of the best and create a weekly post that shares those pictures on your blog. This way you can keep your costs low (and profile your customers too). That's a win-win situation!

## 3. Give your people a voice

Introducing your team in your blog is a great way to beat out the competition. It's something bigger web stores will never do. By asking your team members to each write a short profile about themselves, adding a pic, and sharing it all on your blog, you can build trust with customers-to-be and existing customers as

well. It's always nice to know who you are dealing with. Tattly<sup>37</sup> does a great job on this front.

Once you have your team profiles up, and your customers are getting to know the members of your team, you can then start to position yourself as an authority on not only your products but up-and-coming trends as well. Sharing your insights on your passion will start to ignite their passion for your brand.

To sum up, your blog is the innermost of your defense lines. If you keep your content relevant to your product, show your products in context, and address your customers in a personal “voice,” you will not only head off potential questions but also spark people further down their decision-making journey toward you and your brand.

Now, we'll look at putting all of those defense lines together.



## Putting it all together

Our goal with this section was to make certain that your support content is ship-shape, so you can avoid as many questions in your inbox as possible.

By following the advice for each of the four defense lines, and bearing in mind your customer journey, you should now be ready to better manage — and meet — the expectations of your customers.

Just to quickly go over them once more, the defense lines are as follows:

- Product pages — Analyze your support questions to make certain all of your site's most frequently asked questions are clearly answered in your product pages wherever possible.
- Support pages and FAQ — Cover all six policy basics: Product FAQ. Order status. Payment and security. Shipping. Returns. Privacy.
- Knowledge base and community — Sort topics by the most popular. Review regularly. Create new articles based on new questions. Optimize for mobile and search engine capabilities. And be certain to involve your team!
- Blog — Establish clear product-related themes. Show your product in context via video or images. Give your people a voice. Publish, promote, and be social!

Your customer defense lines strengthened, there are still other ways to make your website and your store even stronger. And it all comes down to understanding what the customer needs before asking for it.

## 4.6

# Don't Let Consumers Check Out at Checkout



When we talked about your customer service strategy, we asked what role customer service plays in your online store — does it help retain, or even build more, loyal customers? Or are you losing customers along the way? Do you have “leaks” in your current service model?

And so (it had to come sooner or later!) it’s time now to address what, for almost every web store owner, is the single biggest leak in their “customer service bucket” — their shopping cart.

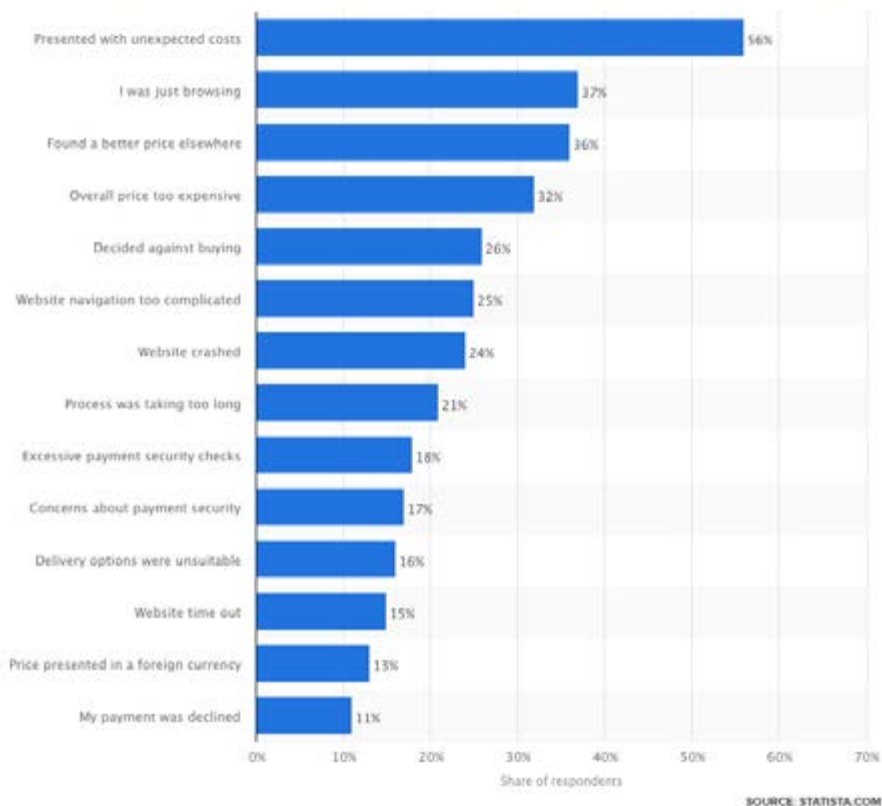
Now, we are not cart development specialists, but we bet you know someone who is. So we recommend buying them a present — the incredibly valuable cart checkout reports from Baymard, an independent web usability research institute.<sup>38</sup> At only \$150 each they’re a steal. Baymard has over 130 free articles<sup>39</sup> of guidelines, tips, and tricks to fully optimize your cart checkout process.

In March 2014, Baymard averaged cart abandonment rates from 100 U.S. stores at a whopping 67.91%! That’s quite a stat.

After a bit of research, we’ve crunched down all of the reasons<sup>40</sup> why<sup>41</sup>

consumers abandon<sup>42</sup> their shopping carts<sup>43</sup> and came up with three golden rules that will help you to stop this reckless “abandon.”

## WHY DO ONLINE SHOPPERS LEAVE WITHOUT PAYING?



Rule #1: Communicate all costs — up front!



Almost every study, from Hubspot<sup>44</sup> to Statista<sup>45</sup> and more, shows that the single biggest reason customers abandon their cart is because they encounter “unexpected” costs at the last minute.

*“56% of customers leave without buying because they are presented with unexpected costs during checkout”  
Statista, 2014*

Throughout this guide we’ve often talked about the importance of cost transparency. A clear pricing policy is part of the “defense lines” against unhappy customers.

So the very first step should be to be certain your full costs are clearly communicated up front — especially shipping costs, often the biggest cause of disappointment.

You should bend over backwards to offer free shipping. Why? As Comscore<sup>46</sup> says: 61% of consumers are at least “somewhat likely” to cancel their entire purchase if free shipping is not offered. Ouch!

Of course, if your products are big and bulky, customers may understand. Still, do everything you can to make your shipping free of charge. Not sure how to start?...

- Offer free shipping to “members only” — this brings people closer to your brand and encourages them to buy more with special offers.
- Offer free shipping with a minimum order — calculate that order value at, say, \$10 above your average order value to encourage people to buy more.
- Offer free shipping on high-value items only — this will make customers feel appreciated and encourage them to return.

There are more tips on how to manage and deliver free shipping here<sup>47</sup>. Once you have double-checked that all of your costs are fully transparent — and you’ve offered free shipping wherever possible — what’s next? Simple: Make the customer experience an easy one...

## Rule #2: Gently guide customers through their decision-making journey



According to Forrester Research in this study from SeeWhy<sup>48</sup>.com, the second main reason people abandon their cart is because they are simply not ready to buy just yet. That's an important insight!

An abandoned cart does not necessarily mean a lost or unhappy customer. Rather, customers like to use your checkout cart as a wish list — a good place to compare colors, sizes, prices, and so on, all to help make their final purchase decision.

Customers often leave the cart behind to ask family, friends, or check out your competitors. But they are most likely to return. This is backed up by a stat from that same study which shows 99% of first-time visitors will not buy on the first visit!

*"99% of first time visitors will not buy on the first visit!"*  
*SeeWhy.com*

Plus, 82% of frequent shoppers<sup>49</sup> always use the cart summary to make their final decision. So if you're thinking those customers who abandon their carts are just wasting your time, it's time to think again.

Below are three ways to help you stay engaged with your customer throughout their decision-making process. You can find more here<sup>50</sup> and here<sup>51</sup>. But, for now, these are a great place to improve cart abandonment.

- E-mail customers who abandon their carts and incentivize them to complete their transaction with either free returns, reminders of free shipping, or live chat or phone support. You can find some useful examples and templates<sup>52</sup> to help you do that right here, courtesy of Marketing Sherpa<sup>53</sup> You can also check out SaleCycle<sup>54</sup>.com and Vero<sup>55</sup>.
- Offer a loyalty program! According to Forrester, loyalty program members spend up to 13% more than non-members. So if your customer is checking out the competition, an irresistible offer on future purchases just might be the trigger to not only bring them back but also increase their spending over a lifetime. If you are on Shopify, there are several apps for this<sup>56</sup>.
- Employ retargeted marketing to emphasize live chat or phone support. This is a next-level solution that crosses the borders between marketing and customer service. As this article<sup>57</sup> says, “By combining call tracking, display ad retargeting, and click-to-call advertising, you could create a retargeting campaign that uses a call-tracking solution<sup>58</sup> to advertise phone ordering/customer support on the sites your visitor goes to — after they abandon their cart in your store!”

The goal of retargeting and call tracking<sup>59</sup> is to re-engage with customers who abandon their cart through whatever channel(s) you have available. This opens up new opportunities to incentivize customers to return so you convert more.

But — and this is a very big but — a great brand loves its customers; make certain not to track and hound people into buying to close that sale.

Your customers are looking for impartial, honest, personalized advice on what to choose. They may just not be certain about a particular material or size, they might have questions about compatibility, so throughout the process, keep your communications as open, and as valuable to your customer, as possible.

Focus on answering their questions, not closing a sale. By applying your brilliant soft skills, you can guide them gently through their decision-making process. And they’ll love you for it.

We’ve covered costs and guiding customers through their decision-making process. The last step is to think about which devices shoppers use and when — and what you need to do about it.

## Rule #3: Optimize your shopping experience for all devices



The last main reason customers abandon their shopping cart is down to their choice of device. In particular, their “switching habits” at different stages of the decision-making journey.

According to this 2013 study, 34% of your traffic<sup>60</sup> is likely to be via mobile device. And, as of 2013, only 4.5% of the Top 500 Internet Retailers<sup>61</sup> use responsive design, so there is a competitive edge to be won over the bigger stores too.

If you have a Shopify store, you are probably well on the way to being optimized for mobile<sup>62</sup> devices, tablets, and the like. But if you’re not optimized for all devices, it’s worth considering.

Today’s online shoppers are sophisticated — especially frequent shoppers. And they often swap from desktop to laptop to smartphone or tablet throughout their decision-making journey.



So, for example, they might do a little shopping from their desktop at work then store items in their cart to view later. On their train ride home they may well refresh their memory by looking again at the cart on their smartphone. Then, once back at home, they may pick up their tablet, chat with family or friends about their potential purchase, and only then make their final purchase decision and complete their purchase.

No matter which platform your store is on, the message is clear: To help reduce cart abandonment, you need to be ensure your customer's shopping experience is seamless across all devices!

When you have this well under control, your cart abandonment rate will undoubtedly fall. You will also have made shopping easier for your customer (one of the four pillars of your service strategy!) and, in doing so, strengthened customer loyalty too.

## Conclusion

In this part of our guide we focused on the customer's main reasons for abandoning their cart and offered solid advice to get it under control. To sum up, we offered three golden rules:

1. Rule #1: Communicate all costs up front!
2. Rule #2: Gently guide customers through their decision-making journey
3. Rule #3: Optimize your shopping experience for all devices

By following these three rules, you will have tackled all of the biggest reasons for customers abandoning their cart, and thus improved conversion, satisfaction, and even customer loyalty.

Of course, as a growing business, we assume you already have all the cart “best-practice basics” in place. If you're not 100% sure, check out the 15 questions below. Sit down with your developer and go through them one by one.

## 15 Questions to Help Optimize Your Cart and Reduce Abandonment



These best-practice cart optimization questions are drawn from Hubspot's 11 Elements of Effective eCommerce Checkout Page Anatomy<sup>63</sup>, the Fundamentals of eCommerce checkout design<sup>64</sup>, and the State of eCommerce checkout design<sup>65</sup>.

1. Do you allow “guest”<sup>66</sup> shopping?
2. Is your checkout process linear? (a one-page checkout<sup>67</sup> is perfect!)
3. Do you have “breadcrumbs” so people know exactly where they are at all times?
4. Can customers move backwards and forwards without losing data?
5. Can customers shop across devices without losing data?
6. Can people save the cart and continue shopping at any time?
7. Can customers see thumbnails of their purchases?
8. Can they edit quantities or colors easily?
9. Do you offer cross- and up-selling suggestions unobtrusively?
10. Is there automatic field validation?
11. Are payment loyalty seals clear and crisp?
12. Do you use shipping address as billing address default?
13. Do you use clear error indicators?
14. Have you asked for any information twice?
15. Do you offer an opportunity for live chat in your cart?

## 4.7

# The Strategy of Customer Service Channels



The next time you walk into your favorite brick and mortar clothing store, try noting the number of service interactions — and conversations — you encounter in a single visit.

*“The holy grail of eCommerce customer service is to replicate the easy, personalized, consistent and pleasurable shopping experience of a brick and mortar store.”*

ROBIN

Consider: From the outside, you see the shop front. Maybe there’s a sale on or special offers. Walking inside, you see men’s or women’s sections, a “new collection” sign and some cool posters or flyers.

A shop assistant greets you — even if it’s just with a little nod or a smile at first. They’ll soon wander over and kick off a conversation with you. They’ll ask what you’re looking for and offer expert, personalized advice.

Once you’ve chosen, they’ll walk back to the checkout with you, sort out any further questions you might have, wrap your purchase up nicely, take your payment, thank you for coming to the store, and wish you a very nice day!

This is the holy grail of customer service — an easy, personalized, consistent, and pleasurable shopping experience. Of course, your customers would love you forever if you replicated this in your own online store.

But thanks to today’s tech-savvy<sup>68</sup>, smartphone-toting<sup>69</sup>, channel-hopping<sup>70</sup> online shopper<sup>71</sup>, you have an ever-growing stack of channels to wade through before you can start getting up-close and personal.

Having a strong grip on your customer service channels is one of the key competitive differentiators between an online store that’s “moving along nicely” and a store that is truly becoming a market leader.

In our previous posts we covered your “self-service” channels (product pages, support pages, FAQ, knowledge base, community, and blog). Now, we’re focusing on your main “assisted” service channels — social, e-mail, chat, and phone.

## CUSTOMER SERVICE CHANNELS



We’re going to look at the typical channel challenges you face, offer some pointers, and share a great framework to help you optimize those channels.

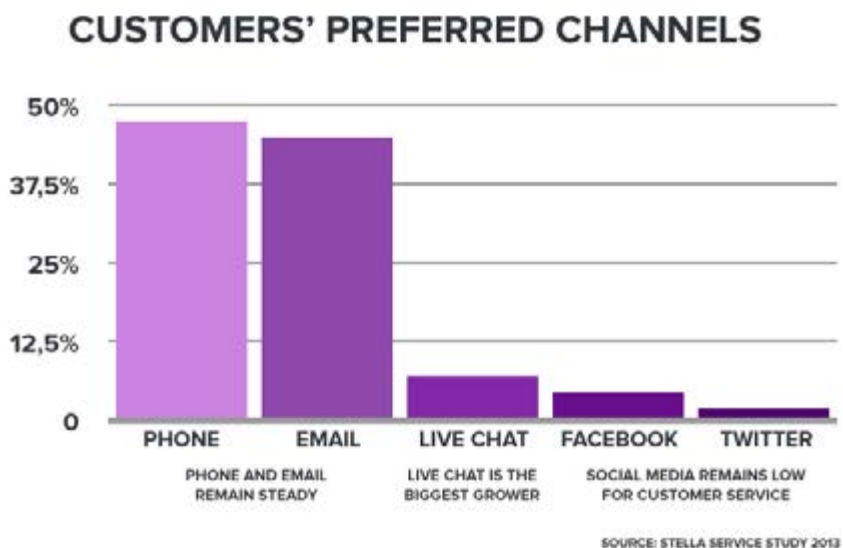
To get started, let’s take a look at these channels from a customer’s point of view...

### Channels from your customer’s point of view



“Omni-channel<sup>72</sup>” is the new buzz<sup>73</sup>word. To paraphrase CloudSherpa<sup>74</sup>: “Ask a customer who has the best omni-channel service, and they’ll frown. Ask them who has the best customer service and they’ll tell you right away.”

Customers don’t think in terms of channels. They only think about getting an answer to their question or complaint. Depending on where they are — at home, on the move, or at work — they will want to use whatever device is at hand (computer, cell, tablet, etc.) to get to that answer. In other words, whatever is most convenient at the time. So is there such a thing as a “preferred” channel? Well, the data varies quite a bit.



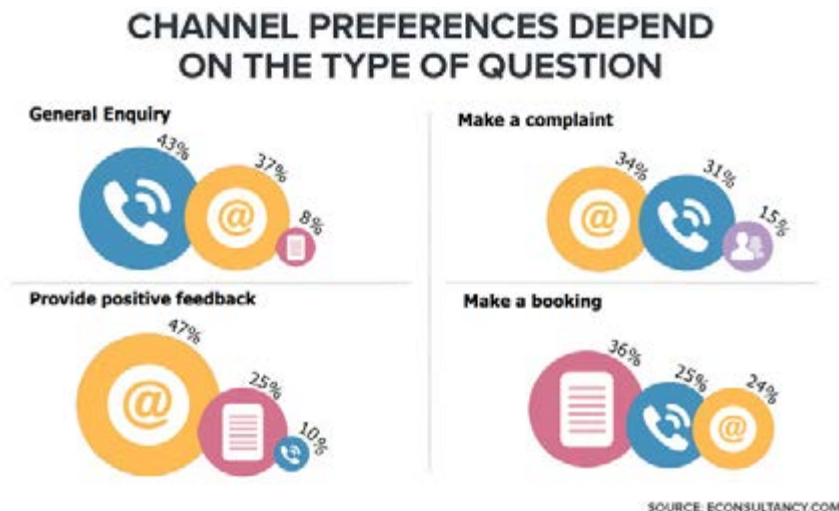
STELLAService found phone and e-mail were the most preferred channels; in 2013 Forrester Research<sup>75</sup> found that e-mail is the third most widely used channel with 58% of shoppers choosing it as their method of communication.

Web chat has increased in popularity over time — adoption having risen from 30% to 43% between 2009 and 2012<sup>76</sup>. It also has the second highest satisfaction rating after voice with consumers.

Preferred channels also depend on how you slice and dice them. For example, in 2013 Forrester Research found that 71% of consumers prefer “voice”<sup>77</sup> (phone and chat) to any other channel (just as we’d said!).

*“71% of consumers prefer ‘voice’ over any other service channel”  
Forrester Research, 2013*

Channel preference also varies depending on the type of product, the urgency of the issue, and, most importantly, the type of question.



But no matter what the issue, no matter who the customer is, they do expect you to be “agile across all channels<sup>78</sup>” — switching from one to another without any effort.

And — as all the studies from PWC<sup>79</sup> and Evigo<sup>80</sup> to Zendesk<sup>81</sup> and Intersperience<sup>82</sup> show —there are three big things customers value more than anything else:

- A quick response — no matter what the channel. According to this study<sup>83</sup>, 71% want a response in under 5 minutes. But typical channel response times vary considerably. A 2013 STELLAService<sup>84</sup> study shows that Live Chat response times typically come in at 1minute 11 seconds. Phone is second at 1 minute 12 seconds, Twitter, third at 4 hours 6 minutes, and e-mail is last at a massively customer-disappointing 10 hours and 33 minutes! Ouch.
- A friendly response — no matter what the channel. Earlier, we shared CEB statistics<sup>85</sup> that show a friendly interaction is the most effective way to create customer satisfaction. But different channels typically generate different degrees of satisfaction. This study<sup>86</sup> shows 91% of customers are satisfied with service via phone. Chat has the second-highest customer satisfaction rate (85%), and self-service channels come in a very respectable last at (83%).
- An effective response — no matter what the channel. As long as the

problem (or question) is solved in one contact whenever possible, customers are happy. This Accenture study<sup>87</sup> shows 82% of customers that switch brands would not have switched if they had their problem solved in the first interaction. And results differ by channel. STELLAService found that live interactions had an 88.5% resolution success rate but only 58.6% rate in e-mails. Harvard Business review research confirms this, suggesting it takes an average of 2.4 e-mails to get a query resolved, as opposed to 1.7 phone calls.

# WHAT CUSTOMERS REALLY WANT FROM YOUR SUPPORT TEAM



**QUICK**  
- A RESPONSE TIME IN MINUTES, NOT HOURS OR DAYS

**FRIENDLY**  
- A PERSONALISED, CONFIDENT, HUMAN CONVERSATION

**EFFECTIVE**  
- THEIR PROBLEM SOLVED IN ONE SINGLE INTERACTION

The image above shows off some great advice and is a great focus for your channel strategy. Now, let’s look at channels from your point of view.

## Channels from your point of view



We've included a summary of the main channel challenges online store owners face — along with a couple of pointers too. Afterwards, we offer a framework to start optimizing your channel strategy.

## **1. E-mail**

Hopefully, you are already using a tool to manage support e-mail such as Zendesk<sup>88</sup>, Desk<sup>89</sup>, Freshdesk<sup>90</sup>, Helpscout<sup>91</sup>, GrooveHQ<sup>92</sup>, or even ROBIN's<sup>93</sup> — our own. However, in our experience many teams still use Outlook (Exchange) or Gmail.

Using standard e-mail clients can become a serious problem when hitting a growth curve. For example, when you're using Outlook Exchange, a customer support email lands in multiple Outlook inboxes.

When any one of the team members opens the e-mail, it shows up as opened in everyone's inbox. This can often lead to missed mails, duplicate responses, delayed responses, etc. Maybe even one of your team members drags a message over to a personal folder, at which point no one else can find it.

It's difficult to categorize e-mails. When you work in Outlook or Gmail, it's almost impossible to get any contextual data into the mix that will help you deliver great service.

## **2. Phone**

The main challenge with phone service is that, when someone calls, your reps need to be able to pull up an order and conversation history in order to see when that customer called last.

Quite often web stores cannot do this. As such, it's difficult to properly analyze many issues people may be calling about. And the last thing you want is for your customer to have to re-explain previous problems to yet another service rep.

That's why ROBIN offers phone registration. Every call is immediately part of a conversation history. Others sites have solutions too, of course. You might even want to explore virtual phone numbers<sup>94</sup> — depending on the size of your team and the type of contacts you most encounter.

## **3. Live chat**

As we pointed out earlier, live chat is a clear growth opportunity. "Chatters" are a high-value segment (they spend 55% more than non-chatters), and they convert 7.6x better than non-chatters too.

Although live chat often has the biggest satisfaction rating<sup>95</sup>, it also brings its own

particular challenges. The main one being that live chat is, well, live! It demands a response time in seconds, not minutes.

And once you get more than one customer online, you need concurrent user capability in your chat app. The success of live chat depends on how well your team is trained in the art of customer conversation.

Integration with e-mail<sup>96</sup> can also be a challenge. If you are to meet the customer need for speed, you must be able to draw on all available customer data from across platforms to solve their problem — instantly!

If you manage it well, live chat can give an incredible boost to customer satisfaction and loyalty. But managing it can be difficult. We've developed a conversation roadmap to help you get there.

#### **4. Social Media**

The majority of eCommerce sites today use Facebook, Twitter, a channel for images (Instagram or Pinterest), and one for video YouTube or Vimeo). And they use them primarily as a content marketing<sup>97</sup> channel.

Every social channel can generate product or service questions. But by far the biggest use of social by consumers is to praise (or complain about!)<sup>98</sup> your customer service.

So you need to know what to look out for: Product or delivery questions and/or complaints. And then manage them appropriately.

In terms of response time, what can you expect? Well, it's no surprise — customer expectations run high<sup>99</sup>: 32% expect a response within 30 minutes. 42% expect a response within 60 minutes. On the other hand, only 2% actually use social media for customer service<sup>100</sup>.

If you're to get a grip on social media, it's all about assessing the types of questions you get and then prioritizing the management of that channel. But we'll discuss that later.

To sum up: Each and every channel carries its own particular set of challenges. And it's often tough to know where to focus first. Good thing we're not done here just yet....

## **Two Steps to Optimizing Your Channel Strategy**

At the start of this section we noted that the Holy Grail of eCommerce customer

service is to replicate the easy, personalized, consistent, and pleasurable shopping experience of a brick and mortar store.

At this point, however, there's one more thing we need to add to the mix: The cost of delivering that customer service experience you, and your customers, are after. Taking into consideration both costs and customers' needs, you will be able to build a more profitable business.

There are two steps to optimizing your channel strategy: The first step is to do your own assessment of the actual business value of your channels (see our four questions below).

The second step is optimizing your channel strategy to make certain you have the right people, processes, and tools in place. That way you have a channel strategy you can really scale!

## Step 1: Four Questions to Assess Channel Profitability

We've adapted Gartner's<sup>101</sup> "Four Vs of Big Data" and applied them to customer service-assisted web store channels. (More info about big data and eCommerce <sup>102</sup>right here!) Cheeky, yes. But it works!

You don't need to go too deep here. You already have a good understanding of what channels work and how. Our goal is to focus you more on overall profitability rather than getting stuck in tactical problem-solving mode.

### **Volume: How many service contacts per month do you get in one individual channel?**

Why not use the split we suggested earlier: phone, e-mail, live chat, and social?

### **Variety: What are the main types of issues you encounter in this channel?**

You could use complaints versus questions or, as we suggested earlier, split this by pre-purchase and post-sales. Both will work.

### **Velocity: How quickly do customers get their issues resolved in that channel?**

This, considering our principles of great customer service — and one of the three main needs of today's online shopper.

### **Value: What is the average order value of your customers in that channel minus the costs of servicing that channel?**

Look at the average order value per comment, question, or complaint and then subtract the number of hours you put into that channel.

Once you've answered those four basic questions, you should have a more realistic view on how your channels are currently working for your customers and what it is costing you too.

You can next use these insights to start shaping your service channel strategy. "People, process, systems" is a model used by many leading management consultants<sup>103</sup> to help businesses deliver on their business ambition.

## Step 2: The Three Parts of a Great Channel Strategy

Below is an explanation of what each part entails with a series of thinking points. Your goal here isn't to tell your team what they are good — or not so good — at. Your goal is to ask them what they think. Nothing more.



- **People:** Ask your team what they believe are their own strengths and weaknesses in each channel. Ask which one of them is best and in which channel. Each channel is very different. And each team member has different preferences and skills. By mapping this, you will better understand the gaps in your channel strategy.



Once done, you can get those who are best on one channel to train those not quite as good. This is a great way to get your team to coach each other — and already start to deliver better customer service along the way.

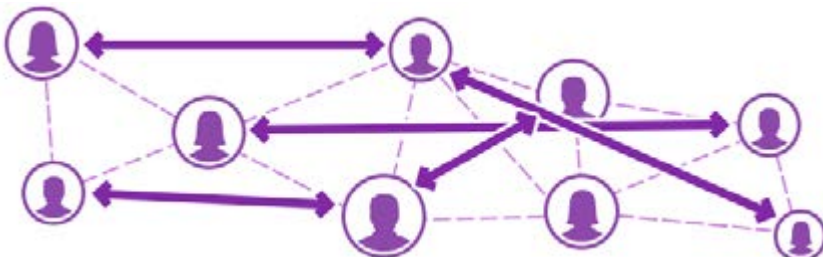
- **Process:** Once you have defined who is good at what, you should think about routing: What type of question should you route to whom based on their skills. For example, some of your team will be much better at handling product questions, others complaints. This is the second level of shaping a channel strategy that really works.



- **Technology:** Once you have defined who is good at what, and who is best at handling which type of issues, it's time for you to think about how you can enable your team to deliver every time through the right channel tools. There are two main things to consider here: convergence and collaboration.

By convergence we mean asking yourself if any one of your team members can quickly and easily call up any information — from any channel — to solve customer question. That means all the funky stuff we talked about earlier — conversation history, order history, and so on.

Collaboration refers to how easily your team can collaborate internally — i.e., a quick, internal chat to solve your customer's problem.



Summing up, once you have people and processes, the decisions about technology become much easier. You know who is best in which channel and best with what type of issues, and you will know what type of technology you need to allow your team to deliver.

People, process, and technology is a powerful little model. And once you have this under control, there is only one thing left in our great customer service model: How to measure the results!

Understanding the intricacies of great customer service is a major portion of the world of customer service. But let's dig deeper. Assessing your team's accomplishments, plus the areas in which they could use improvement, and how your shoppers shop, all expands your world immeasurably...

## 4.8

# Measuring eCommerce Success: Customer Service Metrics, KPI's & more



It really doesn't matter whether you are selling electronics, home and garden, food and drink, or funky clothes. At some point, after your online store takes off, measuring results becomes especially important.

When you're taking things to the next level, you need to be sure you're measuring the right stuff, the right way, so you stay on the path to growth.

So, if you measure (and reward) your team for lowering call time, for example, yes, you will cut costs in the short term. But, as we know from our principles and strategy pillars, lowering call time alone does not meet the needs of the customers and will not best generate customer satisfaction or loyalty.

*“Lowering call time alone will not best generate customer satisfaction or loyalty”*

To close off this chapter we're going to take a look at metrics and KPIs that we believe you must measure to keep on the right track and offer a full-on KPI and metric model (and one extra goodie too).

Our advice on KPIs and metrics is based around our three principles of great customer service as well as meeting the needs of today's online shopper at the lowest cost to you. That way, you can be certain you are heading toward a fully

scalable and profitable customer service model.

## Key customer service metrics

A metric is basically anything you can measure. Metrics help you make tactical decisions on a daily basis. They give you a handle on where you are and what is happening.

But not every metric is a Key Performance Indicator (KPI). KPIs are the metrics that tell you something about overall performance in relation to your overall business goals. They keep you focused on the bigger picture.

Based on the insights we've offered in this guide, below are the 10 metrics we think you should be measuring. Are you measuring them all?

### Metric #1: Churn Rate (a.k.a., Attrition)

Churn rate is the number of customers who leave your brand over time. Depending on your product and model, this can be difficult to assess realistically. The more SKUs you carry, the easier it will be to determine.

Some web stores measure churn rate every 30 days. Others every 90 days. Remember that the length of a decision-making cycle is important to bear in mind. Choose the length of time you measure carefully.

The value of measuring churn is in developing retention strategies. RetentionGrid<sup>104</sup> offers an excellent app to further help you slice and dice your customer segments. The app even offers e-mail campaign ideas to keep customers coming back.



## Metric #2: Total Volume by Channel

Understanding which channel is the busiest, in terms of customer service-related questions, is key. Not every website is the same; not all customers are the same. Assessing this, you will be able to adapt your channel strategy so it best meets the needs of your customers.

One thing to note here is that it is to your advantage to pick the channel that works best for your business. This post from KISSMetrics<sup>105</sup> offers a nice example of a store changing their channel strategy in response to customer demand.

## Metric #3: Response Time

As per the needs of today's online shopper (quick, friendly and effective service), it is important to measure response time.

Typically, as a small online business, you should be aiming for response times in the minutes, not hours! Of course, e-mail can be difficult. But still, you should be aiming for less than 24 hours as a baseline — and keep improving from there. That's the only way you will out-service<sup>106</sup> the competition.

But as Help Scout points out<sup>107</sup>, pushing for shorter response times alone can actually harm your customer service — a fast but ineffective response doesn't make sense.

## Metric #4: First-Contact Resolution Rates

First-contact resolution (FCR) is extremely important. Having clear FCR metrics will tell you how well you are meeting the direct needs of your customers and if you are getting their problem solved — and questions answered — in one single interaction.

FCR works on an emotional level for the customer too. As this study from Lee Resources shows, up to 95% of customers will give you a second chance<sup>108</sup> if you handle their initial complaint successfully and in a timely manner.

## Metric #5: Forward Resolution Rate

You're already familiar with auto-product suggests such as "People who bought X also bought Y." Forward resolution is a bit like that. Only, instead, you should look out for "People who have a question about X, also often have a question about Y."

There's no hard and fast rule about how to set this up. FAulit fine linens sells home accessories; they realized that those who buy a duvet often have questions about washing instructions when ordering. As such, they now include washing instructions.

Another good example is <sup>109</sup>Pure Fix Cycles<sup>110</sup>. They added the often-asked question "Which is the best type of lock to buy?" Again, adding the information into the ordering process makes things easier for your customers.

As this CEB study<sup>111</sup> shows, heading off the customer's next potential issue is one of the most cost-effective ways to build customer satisfaction and loyalty. You also get a lot less callbacks, so you have a more efficient operation to boot.

## Metric #6: Customer Effort Score

We're pretty sure you have some sort of customer satisfaction metric<sup>112</sup> in place. The only problems with this is that, first, every customer has different ideas of what "satisfaction" is, and, second, satisfaction is not a very good indicator of loyalty.

If you really want to measure customer loyalty, measuring the amount of effort a customer had to personally put in to get their question answered, or their problem solved, is the way to go. This is one metric that will offer you great insight.

In our strategy section we offered a template to help you start measuring customer effort. You can also go straight to the source<sup>113</sup> and follow the recommendations of the Corporate Executive board<sup>114</sup>.

Either way, the idea is to assess — on a five-point scale, from "no effort" to "a lot of effort" — how much effort customers had to put in to get the response needed for their issue. We suggest you then follow the customers whose five-point scale responses you recorded in your churn rate metrics.

## Metric #7: Rep Friendliness

Every customer loves a friendly conversation, and it is one of the single most effective ways to build customer satisfaction. And easy too. You can simply ask your customer in a post-interaction survey how friendly they thought their interaction was.

This will not only tell you about the likelihood of your customers being satisfied but also give you insight into the soft skills of your reps. Note: Be certain to

define the channel used to interact with the customer. Every rep will have different skills in different channels.

## Metric #8: Rep Knowledge

Throughout every service interaction, a customer likes to feel they are in confident, knowledgeable hands. This is partly a soft skill and partly a hard (information-based) skill.

By surveying how knowledgeable your customers thought your rep was, you will be able to manage your team by identifying any knowledge gaps and also be confident you have the right team member handling the right enquiries.

## Metric #9: Cost-to-Resolution

Many online store owners focus on cost-per-call as a core metric. However, cost-to-resolution is much more effective at getting a more realistic grip on your operation's profitability.

We suggest measuring the cost per call and multiply that by the average number of contacts to resolve an issue.  $\text{Cost-per-call} \times \text{average number of calls-to-resolve} = \text{cost-to-resolution}$ .

## Metric #10: Net Promoter

The Net Promoter score (NPS) has been the go-to metric for almost all small businesses over the past several years. However, the longer it has been around, the more people have pointed out the problems with it<sup>115</sup> — and there are a lot<sup>116</sup>!

Our suggestion is to go back to Metric #6 (Customer Effort Score) and start implementing it. Keep NPS going in the meantime.

Soon, you can start testing NPS against Customer Effort and find out for yourself which is a better predictor of customer loyalty.

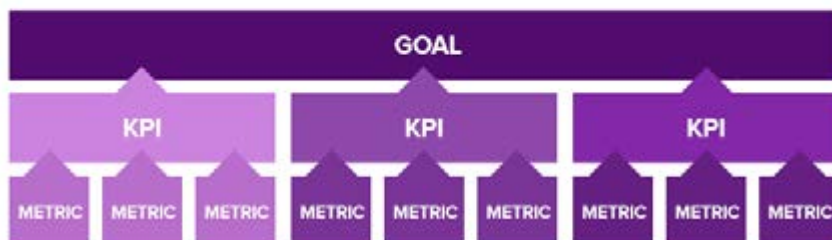
One last tip: Each of these metrics focuses on your operation as a whole. However, if you have the man power, why not split out these metrics by channel? That will give you great insight into optimizing your channel strategy.

Throughout this guide, we've busted customer service myths, offered some sound principles, and given you a few powerful strategy pillars too.

There is still more to cover (self-service metrics, issue classification, and so on), but integrating the above 10 metrics into your operation will put your team in the

direction toward a more profitable operation.

## WHEN SETTING KPI'S USE THE METRICS THAT MOST CLOSELY MATCH WITH YOUR OVERALL SERVICE GOAL



### Customer Service Key Performance Indicators

Metrics tell you where you are right now in individual aspects of your customer service. And a Key Performance Indicator (KPI) is also a metric. But not all metrics make for good KPIs.

Just like in a car, knowing how fast you are going is not a good indicator of if you're heading in the right direction. KPIs often group together metrics and express them as a percentage to give insights into overall performance.

If you have a ton of metrics, but you're not certain if your KPIs are in shape, it helps to think of them in three groups:

1. Input metrics (how much your service interactions cost)
2. Output metrics (the contribution to business goals)
3. Customer metrics (the service impact on the customer).

By looking first at your goals for each of these areas, you can then start to choose the metrics that best contribute to those goals. Not sure where to start? Below are three examples of what we think are great KPIs.

### KPI #1: Percentage of customer complaints

#### KPI: PERCENTAGE OF COMPLAINTS

$$\frac{\text{NUMBER OF COMPLAINTS RECEIVED [METRIC]} \times 100}{\text{TOTAL NUMBER OF CUSTOMERS SERVICED [METRIC]}} = \dots \% \text{ OF COMPLAINTS}$$

Using this KPI will help you better understand the overall nature of your service team's contacts. Is the majority of interactions simply questions about your product or brand? Or is the majority on handling complaints?

Of course, the lower the proportion of complaints, the better. Monitor the proportion of questions vs. complaints over time, and use it to flag insights not only to your service team but your marketing and sales folks too.

## KPI #2: First-call resolution percentage

### KPI: FIRST CALL RESOLUTION

$$\frac{\text{NUMBER HANDLED IN ONE INTERACTION [METRIC]}}{\text{TOTAL NUMBER OF COMPLAINTS HANDLED [METRIC]}} = \dots \text{FIRST CALL RESOLUTION}$$

This is probably the most important KPI for many website stores looking to step up their service-level game. And it is likely that you already have this one in place.

Remember, this isn't about the speed of resolution but about solving the customer's issue in a single interaction that gets you the best results. So be certain not to use the speed of resolution alone in your KPIs!

## KPI #3: Percentage of 'very friendly' interactions

### KPI: PERCENTAGE OF 'VERY FRIENDLY' INTERACTOINS

$$\frac{\text{NUMBER SEEN AS 'VERY FRIENDLY' [METRIC]}}{\text{TOTAL NUMBER OF INTERACTIONS HANDLED [METRIC] X 100}} = \dots \% \text{ OF 'VERY FRIENDLY'}$$

Bearing in mind that the level of friendliness is one of the most important criteria of customer satisfaction — and that this is where you have an opportunity to out-service bigger stores — this is a KPI to keep a very close eye on.

These KPIs should help give you a bit of clarity. As a growing online shopping destination you should be looking to reduce the number of KPIs you use, making certain they are tied as close as possible to SMART business goals<sup>117</sup>.

It's that combination of Input metrics (how much your service interactions cost), Output metrics (the contribution to business goals), and Customer metrics (the service impact on the customer) that will help you attain those goals.

## Tackling the full customer experience

If you have your metrics and KPIs under control, you may want to take things to the next level and look at this white paper from Oracle<sup>118</sup>. In it, Oracle offers a full framework of ideas for KPIs tied into the full customer experience.

Do not attempt to institute all of Oracle's ideas at once. Just choose one of the three main focuses (Acquisition, Retention, or Efficiency) and use it to take a fresh look at your metrics and KPIs. Doing this will help get your head in the right place.

No doubt, all of this can be overwhelming. The key is to break things down into smaller pieces that you can experiment and work with over time. So take a look and pick and choose the metrics and KPIs that work best for you.



## Customer lifetime value: your most important tool ever?



Earlier on in our guide we mentioned that most people believe it is 6 or even 7x more expensive to acquire a customer than it is to retain one<sup>119</sup>. But, as with so many stats thrown about by the gurus, it's just not entirely true.

It depends on how effective your marketing and customer service actually are. Either way, customer lifetime value is an important tool — probably the most important tool you don't use.

At the most basic level, calculating customer lifetime value will help you understand the real financial value of your customers, so you can make smarter decisions about how much to invest in your marketing and/or customer service. It's a segmentation exercise that helps you discover your most valuable customers. Do it well, it can yield massive results.

However, the equation is complex. So we would suggest only tackling it if you have a financial and/or spreadsheet guru on board.

If you are eager to take a look, check out this post from KISSMetrics<sup>120</sup>. If you want to apply the principle quicker — and get suggestions on how to step up your retention campaigns based on lifetime value insights — then check RetentionGrid<sup>121</sup>. We highly recommend them!

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## CHAPTER 5

# The Conversation Roadmap

## 5.1

# Winning The Competitive Battle With Valuable, Personal, Real-time Support



At the beginning of our guide we introduced you to two big ideas. The first was Customer Service as the New Battleground. (And if you've read our full guide, you know that's one big idea that will help you stay competitive.)

Now it's time to tackle the second big idea: Conversation to help you win the competitive battle.

By "conversation" we mean real-time support that is both personalized and super-valuable for your customers. That support will also get you maximum customer satisfaction — and loyalty — in return.

In this chapter we're going to explain why conversation will help you win the competitive battle. We'll offer you a model for the Human Conversation and a step-by-step Roadmap to Great Conversation to get you there.

Although the Human Conversation applies to phone as well, there's already a ton of tips<sup>1</sup>, advice<sup>2</sup>, and best practices<sup>3</sup> already out there on phone conversation, so we're going to focus more on live chat.

As you may know, live chat is often seen as the black sheep of the eCommerce service family: It's hard to manage, costly, and time consuming. And those aren't the only challenges<sup>4</sup> involved...

If you implement live chat without understanding the expectations of today's online shoppers, and implement it without the right team skills and game-plan, you're not likely to reap the full benefits. But black sheep also stand out from the crowd! Successfully deploying live chat can help you win the competitive battle for the attention of today's demanding online shopper. And here's why:

- Your competitors are looking the other way!
  - Less than 60% of the Top 500 eCommerce stores offer live chat<sup>5</sup> — which opens up a clear competitive advantage for you as a smaller store.
- More consumers are demanding (and are happiest with) live chat
  - In 2012 65% of US shoppers used live chat<sup>6</sup> in (up from 58% in 2011) and that figure is set to grow.
  - At an average 1 minute 10 seconds, live chat offers the lowest response time of all channels<sup>7</sup>.
  - Live chat has the highest satisfaction scores for any customer service channel<sup>8</sup>, with 73%, compared with 61% for email and 44% for phone.
  - 88% of all customers want their problem solved in one single interaction<sup>9</sup>, and live conversation is the easiest way to deliver that.
- It helps generate a more profitable web store
  - 83% of live chat users say it increases conversion rates<sup>10</sup> by more than 20%<sup>11</sup>.
  - Chatters are 7.5 more times likely to convert<sup>12</sup> than non-chatters.
  - They spend 55% more<sup>13</sup> than non-chatters.
  - It helps lower average interaction costs<sup>14</sup>.
  - It helps reduce customer service rep task time<sup>15</sup>.
- It offers insight into your product, brand and site improvements
  - It helps you quicker optimise your product range and identify new add-ons, cross and up-sell opportunities
  - It helps you better understand your brand differentiator<sup>16</sup>.
  - It helps you make web store improvements that your customers are looking for.

- It helps you better deliver on your brand promise.
  - As a web store service team, your brand is the biggest competitive advantage — even over your product<sup>17</sup>! And putting a personal, emotional, helpful human face on your brand is something that larger brands will never do as well as you.

We're going to help you exploit all of these goodies as we take a look at:

1. The Relational Shopper — a customer segment that is often “a pain” but probably your most valuable!
2. The Human Conversation — a guide for live chat skills you must have in place if you want to win the competitive battle. And finally...
3. The Roadmap to Great Conversation — a step-by-step guide to successfully deploying live chat across your full online shop.

Let's start with the Relational Shoppers. We'll take a look at who they are and what they mean to you as an online store looking to win the competitive battle with real-time conversation.

## 5.2

# Relational Shoppers: The BFF Of Any eCommerce Store!



*“Transactional shoppers are your bargain hunters. They come and go. But as a cool store with a great brand, Relational Shoppers are your BFF!”*  
- ROBIN

Current mainstream wisdom tells us all shop owners should strive to offer unbelievably awesome support to every single customer, all of the time, and constantly exceed their expectations<sup>18</sup> — so attaining service nirvana.

In reality, while exceeding customer expectations may (depending what any single customer values most) delight some, it will actually result in ever-spiraling costs and definitely not make your business any more profitable.

There are three reasons for that.

First, not every customer has the same expectations.

Second, when you exceed someone’s expectations, you set higher ones in return.

Third, meeting customer expectations gets you almost the same loyalty benefits<sup>19</sup> as exceeding them.

The business logic is rock solid. But no matter which argument you prefer to believe, your starting point should be the same.

In line with our three principles of great customer service, you need to purposefully build knowledge about your customer's needs and expectations to close the service gap.

Roy H. Williams<sup>20</sup> (best-selling author and bona fide marketing guru<sup>21</sup>) offers us a way to do that. He identifies two main types of shopping behaviors: “transactional” and “relational”<sup>22</sup>.

**Transactional Shoppers typically constitute around 80% of your store visits. These shoppers are:**

- Focused only on “today’s” transaction, thinking little about future purchases.
- Fearful of paying more than they need to.
- Lovers of the shopping, comparing, and negotiating experience.
- Researchers — and not really interested in the help of an expert.
- Only going to buy when they get the great deal they’re looking for.
- Going to tell everyone about the great deal they get.
- Not dependable — they’ll leave the instant they find a better deal.

So Transactional Shoppers expectations are simple.

They want a quick, straightforward answer to their question. Most likely, they’ll fire off a quick question (usually via e-mail so they can compare costs later), sometimes during a 30-second chat.

What about Relational Shoppers?

**Relational Shoppers typically constitute around 20% of your store visits. These shoppers are...**

- Thinking about today’s purchase as one in a series of many future purchases.
- Looking for the right place from which to make their purchase.
- Fearful of making a poor choice over anything else.
- Not enjoying the experience of shopping or negotiating.
- Looking for expert advice so they feel secure about their possible purchase.

- Going to buy once they feel secure.
- Going to come back — once they have made a purchase, feel you've taken care of them, and are in need for the same type of product.

Relational Shoppers' expectations are very different. Even though they first approach you with one question, in reality, they have a whole different bunch of expectations.

They're looking for reassurance — expert advice, friendly interaction. They want a completely personalized service. They want to feel 100% certain your product and brand will follow through on its promises. They also want to feel connected with your company on an emotional and values level<sup>23</sup> too.

That's a whole lot of stuff to cover in one interaction. And that's why these customers prefer live chat; it's the easiest and simplest way for them to get all their questions answered in one shot.

So which set of customer expectations should you focus on? Those of Transactional or Relational Shoppers?



SOURCE: ROBINHQ.COM THE DEFINITIVE GUIDE TO CUSTOMER SERVICE FOR ONLINE STORES

## The business value of the Relational Shopper

*"Relational Shoppers represent a smaller share of store traffic but a larger share of sales, higher closing ratios, higher average sales, and higher profit margins."*

*— Wizard of Ads Case study*

Transactional Shopper questions typically make up around 80% of your traffic, and their questions are quick and easy to answer. But they also visit many stores in search of the best deal.

They're frankly not too interested in your brand as long as you are cheap! And as soon as your offer is finished, or they find someone cheaper, they're gone.

The Relational Shoppers are a different story.

As this example<sup>24</sup> shows, and this 2014 eCommerce benchmark study<sup>25</sup> confirms, Relational Shoppers make up only around 20% of your traffic, but they account for a far larger share of your overall sales.

They convert easier than Transactional Shoppers. They spend more. And they're more likely to be loyal too!

As a web store owner with an outstanding product and cool brand — rather than a “bargain brand” — it's a no-brainer: 80% of your business comes from just 20% of your customers<sup>26</sup>. And they are Relational Shoppers. That's why they're your BFF!

### **THE FOUR CHARACTERISTICS OF A RELATIONAL SHOPPER - THE CUSTOMER SERVICE PERSPECTIVE**



SOURCE: ROBINHQ.COM THE DEFINITIVE GUIDE TO CUSTOMER SERVICE FOR ONLINE STORES

## **How to identify Relational Shoppers**

We've outlined four characteristics that will help you identify your Relational Shoppers earlier in their decision-making process they go through about you and your brand.

Once you've identified shoppers with these characteristics, share them with your team. Ask them to look out for Relational Shoppers in any new service interactions.

By offering Relational Shoppers some very special customer service attention, you can actively nurture them towards loyalty — and quickly too!

We'll show you how to build trust and loyalty through your service interactions next, in The Human Conversation.

## The four characteristics of a Relational Shopper

1. Highest volume of questions or queries.
2. Broadest variety of questions.
3. Longest average interaction time.
4. The highest average order value.

It's the combination of these four things that identify a Relational Shopper. Once you've identified them, share those characteristics with your team. Ask them to look out for them in their service interactions.

As soon as you identify them, offer them some very special service. They deserve it! We'll show you how you can do that in The Human Conversation, coming up next.

## One last tip

If you're not sure who your most valuable customers are, make sure you're using Retention Grid<sup>27</sup>! It helps identify high-value loyal customers and determine their behaviors and preferences; it offers opportunity alerts too.



ROBIN integrates with RetentionGrid. This means that for ROBIN users – on Shopify<sup>28</sup> and Bigcommerce<sup>29</sup> – every customer conversation is automatically labeled with the phase of the customer lifecycle. This enables your support team to make more insightful decisions.

Now we know who our most valuable customers are, let's take a look at how you can meet Relational Shoppers' expectations through adopting what we call "The Human Conversation."

## 5.3

# The Value of Emotional Connection



Generation X<sup>30</sup> expects it, Millennials (Generation Y) expect it<sup>31</sup>. Generation Z<sup>32</sup> expects it. And Relational Shoppers of all generations will metaphorically stand up and leave your online shop if they don't get it.

We're talking about The Human Conversation: a real-time, personalized, super-friendly, and effective service interaction which bridges the digital/human divide and creates a strong emotional connection with your customers.

Emotionally satisfying your customers means you get lower attrition rates while encouraging higher spending rates<sup>33</sup>. But you need to do it consistently<sup>34</sup>. It's that consistency that will get you a sustainable competitive advantage.

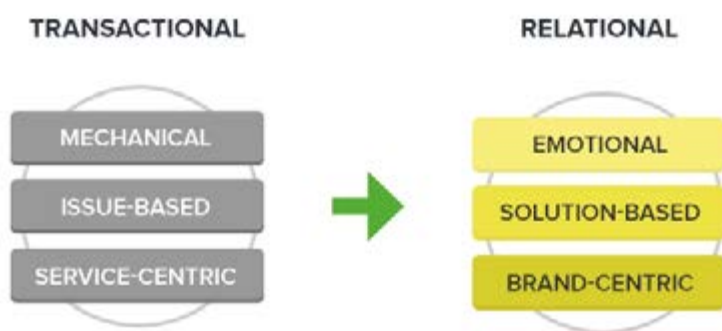
*"Sustaining an audience is hard. It demands a consistency of thought, of purpose, and of action over a long period of time"*  
- Bruce Springsteen.

The Human Conversation will help you get the advantage. We built our model around the customer service research and findings from (amongst others) McKinsey<sup>35</sup>, Booz<sup>36</sup>, Bain<sup>37</sup>, and the Customer Contact Council<sup>38</sup>.

Although The Human Conversation is primarily about stepping up the soft communication skills of your team. By employing The Human Conversation you can expect to...

1. Improve conversion and loyalty with Relational Shoppers — your most profitable customers — by more than 20%<sup>39</sup>.
2. Reduce your number of your repeat queries by up to 25%<sup>40</sup>.
3. Create customer satisfaction in the most cost-effective way<sup>41</sup> possible.
4. Exploit your brand values to the max — the source of your single biggest competitive advantage<sup>42</sup> over larger stores.

The first step toward reaping these benefits comes down to you — as a shop owner — in setting very crystal-clear direction for your team. That's what is called the Commander's Intent.



SOURCE: ROBINHQ.COM THE DEFINITIVE GUIDE TO CUSTOMER SERVICE FOR ONLINE STORES

## The Commander's Intent

As an owner, you will not reap all the satisfaction, loyalty, and profit benefits from The Human Conversation without first giving a clear overall direction to your team. This is what is called a Commander's Intent (see Forbes for more<sup>43</sup>).

Developed in the '80s by the military, the idea of Commander's Intent is to cut down on needless communication. It saves time and ensures everyone on your team is fully focused on attaining the same goals. In *Made to Stick*<sup>44</sup> (one of the best books ever), authors Chip and Dan Heath explain why Commander's Intent is so effective:

"Commander's Intent aligns the behavior of everyone, at all levels, without requiring play-by-play instructions from their leaders. When people know the desired destinations, they're free to improvise as needed in arriving there."

So if you want to start getting those conversion, satisfaction, and loyalty benefits, you should start by announcing you want to achieve three things:

### **1. Shift from Mechanical to Emotional conversations**

Move away from scripted, automated support conversations, toward more personalized conversations focused on creating emotional connections with your customers.

### **2. Shift from Issue-based to Solution-based conversations**

Your team should still keep solving the immediate customer service issue — in one interaction whenever possible — but also uncover and head off their next potential issue as well.

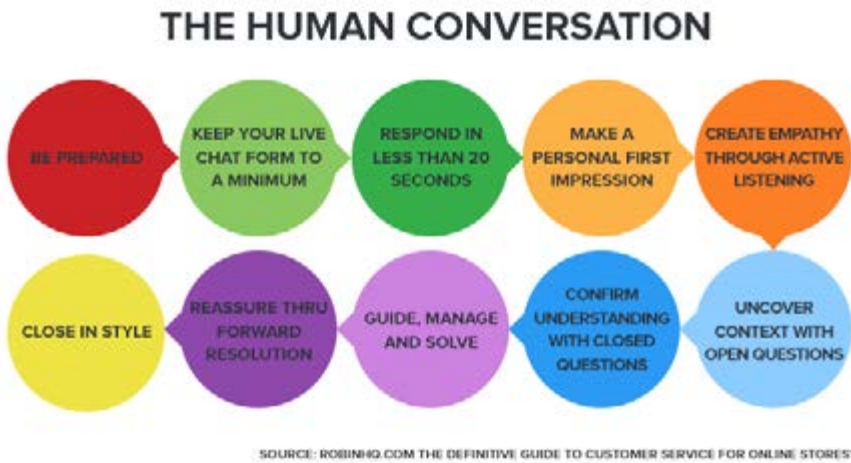
### **3. Shift from being Product-centric to Brand-centric**

Your team should not only have in-depth product knowledge but be brand experts too. Your team should be fully able to articulate your brand values and your manifesto in their service conversations.

Once you have let your team know that this is your intent, you can then follow up with The Ten Steps of The Human Conversation.

## 5.4

# The 10 Steps of Human Conversation



There are lots of good<sup>45</sup> resources<sup>46</sup> on live<sup>47</sup> chat<sup>48</sup> etiquette<sup>49</sup>. However, The Human Conversation offers a ten-step approach to help step up the soft skills of your support team.

By following our guide to The Human Conversation you will be able to reap maximum customer satisfaction and loyalty benefits from your service conversations — in the most cost-effective way possible.

There are ten steps in The Human Conversation:

1. Be prepared — outline specific areas in which reps should be knowledgeable.
2. Keep your live chat form to a minimum — where we take things back to basics.
3. Respond in less than 20 seconds — to meet the needs of today's busy customer.
4. Make a personal first impression — to help the customer make the first step in the emotional connection.

5. Create empathy through active listening — a technique that brings out the best in your customer.
6. Uncover context with open questions —to better understand a customer's hidden needs and expectations
7. Confirm understanding with closed questions — this narrows down the issue and helps you take control of the conversation.
8. Guide, manage, and solve — confidently guiding the customer toward first-call-resolution.
9. Reassure through forward resolution — reassuring the customer that they won't have to come back.
10. Close in style.

Let's take a look at each one in turn.

## 1. Be prepared

*"Give me six hours to chop down a tree, and I will spend the first four sharpening the axe."  
- Abraham Lincoln*

Being prepared is the key. It is your responsibility as a shop owner to ensure your team is fully equipped to service your customers as best it can.

To do that, why not hold a regular Monday morning team meet in which you focus on updating your full team in each of the following seven areas:

- Your site: Are there gaps in your service defense line? Missing product descriptions, perhaps? Let everyone know. Add them to your scripts.
- Your product: Have there been recent changes in specs? New additions to your portfolio? Make sure everyone knows. Again, add them to your scripts.
- Your offers: Do you have offers about to expire? New ones just about to start? Be certain everyone is fully up to speed.
- Your support content: Does everyone have full links to all your key sections/pages/FAQs, etc.? When were they last updated? Any changes, let everyone know.
- Your customers: Let your team know about any major trends in questions or complaints. If you have personas, share them to refresh your team's understanding of who they are about to serve.

- Your brand: Do you have any major news on your brand, such as new sources, partnerships, acquisition, or more? If so, let them know.
- Your go-to guy (or gal): Recap on your routing. Someone away on holiday? Let your team know. This will save time and effort later on.

Once you're confident everyone is fully equipped to handle any potential questions or issues, the next step is to do a quick review of your live chat contact form.

## 2. Keep your live chat form to a minimum

*"Hack away at the inessentials."  
- Bruce Lee*

For the most part, customers use live chat, because it is quick and convenient. So be sure that it takes as little effort as possible for them to contact you.

That means leaving any heavy pre-chat questionnaires for later — once we have a happy customer.

For now, meeting their needs and expectations is what will give you the best benefits. So to keep it easy for your customer; the ideal minimum fields you need are:

- Confirmation of availability (Live Chat hours)
- Customer name
- Client number (if they have one)
- E-mail address
- Phone contact
- Type of question for routing
- Free-form field for question detail

Done? Next step: your response time.

## 3. Respond in less than 20 seconds

Above all, live chat is in real time — and a real-time channel deserves as near to a real-time response as possible. You have a very small window of opportunity to engage customers before they leave.

According to this study<sup>50</sup> the average wait time before visitors give up on a chat is 20 seconds when a pre-chat form is not in use. If you do have a pre-chat form

in place, the average wait time before they give up on live chat is 54 seconds.

Either way, you should aim to pick up live chats within less than 20 seconds. It's simply not worth taking the risk of losing a customer. The tighter you set your targets, the better.

#### **4. Make a personal first impression**

Ideally, you already have clear pictures of your full team<sup>51</sup> on your site. Also, be sure to feature, within your chat window, a small, smiling profile photo of the real person to which your customer is interacting. No generic, stock, or filler pics, please!

The moment the conversation starts, customer service should identify themselves. Far too often, live chat greetings are stiff and formal. So aim for a greeting that is professional, friendly, and personal.

Try starting with “Hi, John! Thanks for contacting us. How are you doing?” This is a neat and simple way to set a positive tone for your customer. It is strong, respectful, and confident.

More importantly, it encourages your customers to take a moment to connect with your store and brand on a personal level. Cunning, eh? This is the very first step in building that emotional connection we are after.

If you choose wisely, you will have a Live Chat tool that automatically pulls in a customer's full data — from customer profile to conversation history, order history, order value, maybe even loyalty info too<sup>52</sup>.

So if the conversation is with a returning customer, there's an option to take a quick look at their info — but don't go too deep. Just a quick orientation while they respond will do.

Once your “chatter” (i.e., your live chat customer) has let you know how they are doing, and you've acknowledged them, it's to ask them what kind of help they need. And, with that, it's time to move on with the conversation.

#### **5. Create empathy through active listening**

Once into a support conversation, the temptation is to dive immediately into solving the customer's problem or answering their question — but that temptation should be resisted. Even if your team member thinks they know what the issue is and how to resolve it.

Why? Your most profitable customer segment, for example, always begins their live chat with just one question. But they're actually looking to figure out if you are made of the right stuff to meet their longer term buying needs. This is where "active listening" comes in.

More than 25% of repeat calls stem from an emotional disconnect between customer and rep<sup>53</sup>. So you need to get this right. All customers are looking for empathy — an ability to see things from their point of view. And active listening is the key. This means staying totally in the present and not jumping into the resolution (which comes in the near future).

Staying present may sound a bit Zen — and it is. But active listening is a powerful communication tool which builds great customer trust every single time. To be a good active listener you need to approach live chat by:

- Keeping a fully open mind
- Not making judgments
- Putting aside your own gut reactions
- Resisting the temptation to solve issues along the way
- Remaining patient.

As your customer speaks, your team should respond with short, affirmative statements that show they're really listening:

- "I see"
- "Yes"
- "Absolutely"
- "Sure"
- "OK"
- "I hear you"

When they do this, rest assured, your customer will already start to feel truly appreciated and understood. And you're now one step further along in creating an emotional connection with your customers.

## **6. Uncover context with open questions**

The goal in active listening was to listen only. But your team also needs to be on the lookout for the bigger picture — aiming to uncover the context behind a customer's question or issue. That's what "open questions" are for, to further explore what your customer is really after. These are some open questions which

help determine that bigger picture:

- Why is that?
- How did that happen?
- What happened then?
- When you say “X,” what do you mean?
- What else did you try?
- Where else did you look?

By asking open questions, customer service will gain a much better insight into the right solution (or solutions) that will be proposed to your customer shortly.

And be sure customer service takes its time with your customers! No one likes to be rushed while they are talking.

When managed efficiently, service conversations are also a fabulous way to gain insights into improving your overall service strategy — as we mentioned in our strategy pillars. So, as the customer talks, be certain everyone is on the look out for little insights into the following three topics.

1. The customer mentioning things that would help reduce their effort when shopping in the future.
2. The customer mentioning things that would allow you to improve operations.
3. The customer mentioning things that could offer you areas for product or brand improvement.

Later on, when you have closed the conversation, feed these notes back into your team and share them with operations. The longer you do this, the better you will understand your service model from the customer’s point of view and know which improvements to focus on.

By now, your customer will have explained all they have to explain. The next step is to acknowledge them. Show them you have been actively listening, for instance by saying:

- If they have a complaint about a product, acknowledge it: “Yes, I understand. You are right. I’m sorry about that.”
- If they have a question about your products: “Yes, you are right, we should have made that info easier to find. We’ll add it to our site right away.”

- If they are having trouble finding the right product, once you explore their needs, the reply should be: “Thanks! I understand. I have a much better idea of what you are looking for now.”

By now, your customer will be certain they are in genuinely caring hands. You have built a great foundation for trust. Now it's time for you to step up, guide the conversation toward resolving their issue.

## **7. Confirm understanding with closed questions**

Once your customer feels listened to, customer service won't have to struggle to take control of the conversation. The customer will sit back and hand your agent control. All that's needed is to say “Ok, let's see if I have this right.”

Your team's goal now should be to confirm that they fully understand your customer's issue or question. This way, they can be certain they're offering the right solution. To do this, ask “closed questions.”

- You are after 'A', right?
- I see. So is 'B' what you're looking for?
- Would 'C' solve your problem?

Closed questions...

- Give you the facts
- Are easy to answer
- Are quick to answer
- Keep control of the conversation with your team!

Once you get a positive reply from your customer, then — and only then — it's time to deliver a solution. From here, customer service stays in control of the conversation by guiding them confidently through every step.

## **8. Guide, manage, and solve**

Now, fully in control of the conversation, with thanks in part to active listening, your team fully understands your customer's needs and expectations.

This is where all your preparation — on product, brand, offers, customers and so on — really comes into play.

The key here is to involve and guide the customer through a solution confidently, professionally, and as quickly as possible. Now is the time for managing their

expectations, speed, and first-call-resolution.

- If your team needs to send a URL to point your customer in the right direction, they must first check that it's ok to send it. Then immediately send it.
- If the customer must be transferred, make sure they know exactly who they will be transferred to, what they can expect, and how long it will take. Determine if all of that is ok.
- If the customer must be put on hold while information is being sought out, explain why, and be certain the team member is back within 2 minutes — maximum.

It goes without saying that in every case, your team should strive to solve customer questions or issues in one single interaction. Do everything possible to make it so.

Once the customer has been provided with a solution, there's just two steps left:

1. Helping the customer feel reassured they won't have to come back, and,
2. Closing the service conversation smoothly.

## 9. Reassurance through forward resolution

*“Forward resolution means not only getting it right this time but pre-empting future contact by anticipating the needs of that individual customer.”*

A truly happy customer is one that not only has their issue solved in one interaction but feels comfortable that they won't have to come back in the future.

Once the customer's current issue is resolved, it's time to think about forward resolution<sup>54</sup> — heading off the customer's next potential issue...

As we mentioned in our strategy section, this reduces the amount of effort a customer has to make in their full experience, and it is the single most effective way of creating loyalty. It also helps reduce repeat calls by around 20%<sup>55</sup>.

There is no hard and fast way of doing this. However, if you have prepared well in understanding your customer, you should be aware that customers who had a problem with 'X' typically also have problems with 'Y.'

If, for example, you have a community, look at the customer answers to any one topic, and look out for related issues within those conversations. If, for example,

you sell designer dresses, then you could anticipate that they may well have future questions about jewelry.

Dropping a customer a link to related jewelry, or updates to latest questions, helps the customer feel reassured they won't have to come back. Having done this, all that's needed is close the conversation.

## **10. Close in style**

By now, having built a strong emotional connection with your customer through The Human Conversation, closing the chat will be easy. There are only a few things left to do.

To close, make certain customer service stays in the same tone and style — if the customer was really open and informal during the chat, the customer service rep must stay in that same mode. If the customer was formal, then keep it formal.

Use closed question techniques to ask something like “Do you have everything you wanted?” If the answer is positive, and you have a truly happy customer, the next step would be to ask them if they wouldn't mind leaving a review or filling out a survey.

Be sure that the customer leaves before you! Waiting until the chat window is closed before ending is the best way to go out on a positive note.

## **Conclusion**

Much of The Human Conversation is focused on building emotional intelligence<sup>56</sup> — and that's probably the single most important skill any rep handling customer service conversations can have.

Active listening is perhaps the most successful technique in building emotional connections. Open questions help your agents uncover a customer's unstated needs and provide all manner of insights. Closed questions help them narrow down on a customer's needs and guide a service conversation confidently.

As we said earlier, the benefits of deploying The Human Conversation are not to be ignored:

- Improve conversion and loyalty with Relational Shoppers — your most profitable customers — by more than 20%<sup>57</sup>.
- Reduce your number of your repeat queries by up to 25%<sup>58</sup>.

- Create customer satisfaction in the most cost-effective way<sup>59</sup> possible.
- Exploit your brand values to the max — the source of your single biggest competitive advantage<sup>60</sup> over larger stores.

## Tips

The Human Conversation is not just etiquette, it is a conversation process designed to help build an emotional connection with customers. However, there are elements of chat etiquette that contribute to this. Here are a few tips for your service reps:

- Keep auto responses to a minimum. Although auto suggests and scripts help a rep interact more quickly, be sure to humanize your statements. Take each one and make a couple of different versions. Edit them as needed before sending if need be.
- Frame conversations in positive words. Switching your customer's "headset" from negative to positive<sup>61</sup> relies heavily on how you frame your responses. You can find some good tips here<sup>62</sup> and here<sup>63</sup>. That last one has a ton of positive phrases.
- Keep it short, sweet, and unfunny! Every customer values their time. So keeping it short is great — but not at the expense of building an emotional connection. Jokes tend not to translate well via live chat. Nor do emoticons. Avoid sarcasm at all cost. And of course, NEVER SHOUT! Enjoy!

## 5.5

# The Roadmap to Great Conversation



You should aim to deliver fast, effective support consistently, across every channel.

In this section of our guide you'll find a roadmap to managing and deploying great support conversations for your web store. With this roadmap, you'll improve customer satisfaction and loyalty and lower support costs too — no matter which stage of business you are in.

Nine times out of 10 your channel strategy will revolve around e-mail, phone, and live chat — your customer's preferred channels.

We are going touch on all channels in the roadmap. But we're also placing live chat at the heart of your channel strategy. Why? Despite many shop owner's hesitations, live chat can help you win today's customer service battle:

1. Your competition is looking the other way:
  - Less than 60% of the Top 500 eCommerce stores<sup>64</sup> use live chat. This opens up a clear competitive advantage for you.
2. More and more customers are trying and liking live chat:
  - By now, around 75% of U.S. shoppers<sup>65</sup> will likely have used live chat.
  - It has the highest customer satisfaction levels<sup>66</sup> of all channels.
  - Live chat offers the quickest response time<sup>67</sup> of all channels.
3. Live chat improves contribution to revenues:
  - 83% of users say it increases conversion rates<sup>68</sup> by more than 20%<sup>69</sup>.
  - Chatters are 7.5x more likely to convert<sup>70</sup> than non-chatters.
  - Chatters spend more money<sup>71</sup> than non-chatters.
4. Live chat lowers support costs:
  - It is 4x cheaper<sup>72</sup> than phone interactions.
  - It reduces phone conversation volume by 12%<sup>73</sup>.
  - Live chat helps lower average interaction costs<sup>74</sup>.
  - It lowers rep task time<sup>75</sup>.

Reaping all of those benefits relies on good preparation, prioritizing, and decision-making from you. It also relies upon great conversations from your team. The ROBIN Guide roadmap will help you do that.

The Roadmap to Great Conversation has five stages:

- Stage 1: Preparing to win — in which we help you set goals, step up your soft skills, and set channel strategy.
- Stage 2: Conversation flow and backlog — in which we help busy stores get their conversations under control and clear their backlog.
- Stage 3: Live chat on cart to increase conversion — how to get back on the route to profits by deploying live chat in your shopping cart.
- Stage 4: Live chat on product pages — how to boost productivity by expanding live chat into your product pages.
- Stage 5: Full site live chat — how to use live chat to strengthen your customer service defense lines as well as build trust and credibility.

If, at any stage of the roadmap, you don't have things under control, go back to the previous stage, then move onwards.



## Stage 1: Prepare to win

*“To be a winner, you must plan to win, prepare to win,  
and expect to win.”  
- Zig Ziglar*

Every great win starts with great preparation. Winning the customer service battle is no different. Stripping it back, there are three essentials you need to have in place before you embark on stage 2 of the roadmap.



### Step 1: Set clear goals

Clear goals will help you measure success. This will help your support team stay focused on the job at hand and keep you on top of progress and direction too.

If you really had to strip things down to basics, what should you measure? In line with our principles of great customer service, we suggest the following five metrics.

- Average response time. This is the average time a customer waits in any queue before being connected to your team. By measuring this you will be able to reduce costs and increase both revenue and customer satisfaction.
- Conversation abandonment rate. This is the percentage of customers who leave before getting connected to your reps — per channel. Measuring this will help you make decisions on the success-rate of each channel.
- Sales conversion rate. This is the percentage of customers (and potential customers) who make a purchase after having had a service conversation with your team. This will help you keep an eye on overall revenues.
- First-contact resolution rate. This is the percentage of questions or complaints resolved in first contact — for each channel. This will help you keep an eye on costs and help highlight increases in revenue and satisfaction.

- Cart abandonment rate. This is the percentage of shoppers who put an item in their cart, but don't complete checkout. This is a strong indicator of revenues and also helps you keep a grip on customer satisfaction.



## Step2: Step up your team's soft skills

As we showed when customer-service-myth-busting, and in our strategy chapter, the single most effective way to increase customer satisfaction is to step up the soft skills of your team.

By using the Ten Steps to The Human Conversation, your reps will be able to build an emotional connection with your customers. And that's exactly what relational shoppers are looking for. So be certain to arm your reps with those skills!



## Step 3: Set channel strategy

This comes down to having the right people, process, & technology in place. This will make certain your team can deliver on the goals you have set. You want to have...

- The right people in the right place. Plan this according to their skills in handing certain types of conversation (questions or complaints).
- The right processes in place. This way you are 100% confident that the right questions are being routed to the right place.

And finally, of course, make sure that your team has...

- The right technology. Asking your team to deliver great support conversations with the right tools is perhaps the most important piece here. If you want to meet today's customer's need for speed, first-contact resolution, and personalization, then ensure your team can access all customer information and data, from all interactions in all channels (e-mail, phone, social, live chat, etc.) and collaborate internally. And do all of that in real time! Convergence of all shop conversations is the key.



In the example above, we used ROBIN's dashboard. But the same principles apply, no matter which solution you have.

Below are some questions to ask yourself when considering the right conversation management tool:

- Can you access all customer conversations, from all channels, in one place? This will help you increase personalization and reduce the chance of errors. You could also potentially increase productivity by reducing system switching.
- Can your team collaborate in real time? This will help you leverage your internal knowledge from across departments and help build service-centricity into your company DNA.
- Can you easily and quickly access your dashboard no matter where you are? And can you do it without additional costs and bothersome updates? Doing so will help you stay responsive to customer requests.
- Can you integrate ratings? Ideally, every great conversation ends with a customer who is happy to share the good news about your fabulous customer service. This increases customer trust and brand reputation.

Are you set? Everything in place? Then let's move on to managing conversation flow and backlog.



## Stage 2: Conversation Flow and Backlog

Conversations are good. Conversations with customers, internal conversations, conversations with suppliers, partners, and so on. It's a great thing that people want to talk to you.

However, as your business gets more successful, the number of conversations can increase to the point where things become unmanageable. We've all been there...

The phone rings. As a real-time channel, you can't afford not to pick it up; you could lose a customer or maybe they'll leave a negative review if you don't answer. So you answer it. And your e-mails then start to take second place.

You end up sacrificing one customer for another, and you have no real understanding of the value you may have missed out on. And so you get others to help handle e-mail with you.

However, if you're using Gmail or Outlook (which many still do) you cannot see who is working on which e-mail. It's often unclear if an e-mail has been answered, and, when a follow up is needed, people drag that mail message into their own inbox and it disappears into a black hole.

Meanwhile, back in the office is the live chat. In real time too. So you need to answer it now. But the phone rings again...

In this sort of situation, customer service feels more like a pain than a pleasure. If you want to tackle conversation overflow, there are three things you need to do: Assess where the biggest problems are, problem-solve to limit damage, tackle your backlog.



### Step 1: Assess and Prioritize

Triage is a term used in hospitals and the military. It means assessing the priority of patients' treatments based on the severity of their condition. To get a true

understanding of where you are at, use the “Four Vs” model we offered earlier. With it, you are looking to assess:

- Volume: How many service contacts per month you get in each channel.
- Variety: What are the main types of issues you encounter in this channel?
- Velocity: What’s the average response time in that channel?
- Value: What is the average order value of your customers in that channel?

Once you know this you will have a much better understanding of where you — and your customers — are suffering the most. Even getting a good feel of where you are will help you make more informed decisions.



## Step 2: Get Tactical

- E-mail addresses: Many online shops have one e-mail address (e.g., info [at] webstore [dot] com) for every department. Change it! That way you have one clear customer-related e-mail address. Make it friendly: getintouch [at] webstore [dot] com or hello [at] webstore [dot] com. You can even add a note to clarify that this e-mail address is for order-related enquiries (for order confirmation, status change, shipping information, and so on).
- Routing: Overloaded inboxes, missed e-mails, and slow response times are often a sign that you don’t have your routing processes in order. So do a quick sanity-check on the role and responsibilities of your team. If needed, clarify who is responsible for handling which conversations. Put it in writing for them!
- Phone: Sometimes difficult situations require difficult decisions. If you are drowning in all channels, it may be wise to remove your phone number for a while and try to push your phone calls into e-mail. Phone calls are the most costly to manage for you. Either way, be sure your team answers new questions in order — the last thing you want to do is add more unhappy new customers on top of older ones.
- Support content: If you notice a large number of questions cropping up time and time again, add these to your FAQ straight away. A strong customer service defense line will help you avoid unnecessary questions or complaints.
- Social Media: In these sort of situations, the answer for “social” is simple: Kill it! Make it crystal clear in your profiles that social is not for customer service. Direct customers to a single e-mail address.

- Live chat: If you currently have proactive chat, remove it for now. This will free up your customer service people to dive into the backlog. Keep a contact page that can be found in your navigation, and make certain the team replies to all new conversations first, so an even bigger backlog isn't created.



### Step 3: Clear the backlog

Now that you have cleaned up your communication flow, you will have isolated your conversation backlog, and you can start working toward emptying it.

- Scan the backlog: The first step should be to explain to customers you are currently facing a backlog and responses may take longer than normal. Send an e-mail to customers from the past week or so and let them know as well; apologize for the inconvenience. This will help manage their expectations on response times. And they will appreciate the note.
- Focus on your biggest pain points: Throughout the triage process, write down your biggest pain points. Remember that, typically, 80% of all complaints are related to product, payment process, terms and conditions, and delivery. Solve these issues first and foremost for old customers. Then tackle them for new customers too. Because it's all the same kind of answer, you can speed up the response process and get out of the crisis situation quicker. If you use ROBIN, by the way, we offer suggestions based on previous replies, so this really helps take the pain away.

Once you have got a good grip your backlog, take some time to think how you ended up there. Was it because of your channel strategy? Was your service ambition too high? Was it because your conversations were not integrated in one dashboard? Or have you just been doing really well and need more staff?

Once you have your conversations and flow under control, it's time to re-prioritize. Going through a semi-crisis situation can often impact revenues. Your first step should be to make up for lost ground.



## Stage 3: Live Chat in the Shopping Cart

At this stage of your business you have your overall communication flow and backlog under control. Congratulations! Now it's time to look for the easiest and quickest ways to improve turnover through customer conversations.

Cart abandonment is the single biggest revenue killer for online shops. At an average of 67.9%<sup>76</sup> it's one area you simply cannot afford to ignore. Cart abandonment can be reduced in many ways. E-mail marketing tools are cool and effective, but why not stop customers from leaving in the first place with great live chat? That's much more (cost-) effective.

There are three main reasons customers abandon their cart:

- Being confronted with unexpected costs.
- They lose their data when switching platforms (from mobile to laptop, for example).
- They're not quite ready to buy yet.

If you followed our 15 Best Practices to help reduce cart abandonment<sup>77</sup>, you should have the first two under control. Now there's only one left: Your customers are not quite ready to buy yet. Time for a great support conversation!

There're three things to focus on: Keeping customers in the funnel as you chat, applying soft skills to sell, and learning from the conversation to benefit your shop as a whole. We'll cover each one in turn.



## Step 1: Keep them in the funnel

- Allow contact while in the cart: Many shops send their customers outside of the cart to contact support. That's a bad move. Be certain that customers can contact you while still in the cart. That keeps them in a Ready-to-Buy mode rather than putting them in support mode. It's the equivalent of a sales rep walking right up to a buyer in a brick and mortar store to help guide that buyer toward a sale. You can do this by phone, but it's much easier and more effective to do it via live chat.
- Signal that you are there to help: If you have chosen phone contact in the cart, indicate there's a number to call if the consumer needs assistance. If you use live chat, use an online dialogue in a layer. With a simple html (on click command) in ROBIN, for example, you can add a nice "Hi! If you have a last minute question, we're right here!" That's a crystal clear signal to your shopper that, whatever their needs, you are happy to help.



## Step 2: Apply soft skills to sell

*“Around 44% of online consumers<sup>78</sup> say that having questions answered by a live person while in the middle of an online purchase is one of the most important features a site can offer.”*

*- Forrester.*

- Keep it human. In the Ten Steps to The Human Conversation we offered the techniques to develop the soft skills that create an emotional connection with your customer. At this stage of a customer’s decision-making process, this is critical — especially with your most valuable customers. So don’t script this conversation too heavily; you don’t know which questions the customers may have. Keep an open mind. Actively listen during the conversation. Keep canned messages out of the equation. And be absolutely certain you man your live chat with the team member who has the best product and brand knowledge.
- Sell through trust. Earlier on we talked about Relational Shoppers. These are the ones most likely to use live chat to get support while shopping. The right technique to convert these shoppers is relational selling<sup>79</sup>. As this useful post<sup>80</sup> describes, that means offering options, ensuring your product or service is right for them, not just of benefit to you. Think of yourself as the owner of a high-end boutique who cares only about happy shoppers. If you do this, your outcome will be a sale! And remember that live chatters are 7.5x easier to convert<sup>81</sup> than non-chatters. They’re more loyal, and you can improve your average order value by around 15% too<sup>82</sup>. As some folks have found, almost 60% of live chats lead to sales<sup>83</sup>.



## Step 3: Learn from the conversation

- Gain product and brand insight. Customers who are happy to chat at this stage of their buying journey are a great source of insight into your overall business. One customer may tell you here what 20 others haven’t. If they have questions about products they want but you don’t stock, feed that information back to your team. Then be sure to continually strengthen your defense lines. If a customer is uncertain about the color of a product, for example, improve your product pictures as soon as possible. This will also help reduce returns too.


To sum up, live chat deployed in your shopping cart is one of the most effective

ways of increasing conversion. Eighty-three percent of live chat users say it increases conversion rates<sup>84</sup> by more than 20%<sup>85</sup>.

It helps reduce your costs too: Those who prefer live chat convert up to 7.5x easier<sup>86</sup>.

It also increases loyalty: Live chatters simply spend more<sup>87</sup>.

That's what you get with great live conversations in your shopping cart.



## Stage 4: Live Chat on Product Pages

Now you have experience in live conversation in your shopping cart, and you are improving conversion (and satisfaction), it's time to expand live chat conversations further across your shop.

The first step is to add live chat to your product pages — where shoppers compare and make their purchase decisions. Your goal with these support conversations is to guide them through their decision-making process.

Here, you have the opportunity to match their needs to your very best offer and increase sales, create up-sell opportunities, and even reduce support costs by putting the right people where they will have the most effect.

*“Live chat is three times cheaper<sup>88</sup> than phone!”  
- Forrester*

Our goal in this stage is to help you make decisions that will help you boost the overall profitability of your shop. That involves smart placement of your live chat, managing your team's expectations, and piloting proactive chat.



### Step 1: Smart placement

- Be clear about your availability. Make it clear when you're available in your contact button. Restrict your hours according to your resources. Raising expectations is the last thing you want to do with live chat. Meeting them

is everything. When shoppers see live chat they expect “live” — that means responding in less than 20 seconds! So, whatever you do, be 100% certain you can. Choose your availability times. Communicate it clearly. And stick religiously to it.

- Start with your most valuable products. Take a look at your full portfolio. Which are your most profitable products? Start by placing live chat there, and then, as you get a grip on results, scale out. Limiting your live chat function to only the highest value — or most profitable — products is both simple and a sure-fire way to increase sales and profits too.
- Manage conversation volume. Bear in mind that placement of your chat links will have an almost immediate effect on the overall number of your support conversations. So once you kick it off, be sure to adjust to where you are comfortable with it.



## Step 2: Manage team expectations

- Two conversations at once. On average, according to research from Oracle, a rep can handle two-and-a-half conversations<sup>89</sup> at once. More complicated questions will keep things down to one or two at a time. Easier live chat conversations mean it's possible to handle five, six, or even more simultaneously. That beats the heck out of dedicated phone conversations. And this is where your biggest cost reductions will come from.



## Step 3: Pilot proactive chat with rules

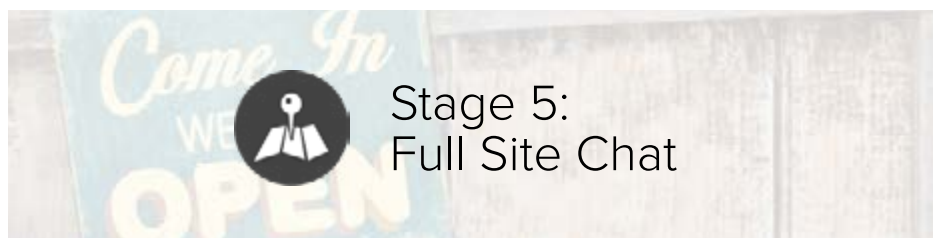
So far we've focused on ensuring you are available through live chat — if your customer looks for it. Your chat window sits there, waiting to be clicked. That is called “reactive live chat.”

Proactive chat is when you automatically pop up a chat window, triggered by a specific set of criterion. Those criterion are called business rules. To pilot proactive chat use the rules below:

Defensive rules. Defensive rules help prevent or reduce abandonment. In other words, they encourage people to keep on shopping. So if, for example, you see that a customer has spent more than 2 minutes on a product page without adding it to the cart, this is a good indication that they are struggling with their decision. Adding a proactive chat popup here is a good bet. You could also do

the same when a customer is in the cart after 1 minute or when you identify a customer with a high customer lifetime value the moment they enter your store.

Opportunistic rules. This rule is primarily focused around your high-value products and those items with strong up- and cross-sell opportunities. Identify groupings of your highest multiple orders and set proactive chat to trigger there. Once you have smart placement, your team is managing its workload, you are piloting proactive chat, and you have measured the results, you should be able to move on to the next stage of the roadmap.



This is the last stage in our roadmap to great conversation. For many online store owners, deploying live chat across their entire site is quite a big step. However, if you are measuring results, you will know what works, and what doesn't.

By following the steps below, you will be able to scale out live chat manageably and — along the way — start to help turn your support from a cost center to a profit center. So, where should you start?



### Step 1: Bolster your defense lines

Your customer service defense lines are the main content resources on your site in which questions arise — or where customers go to get them answered. We suggest you deploy live chat in each one in turn (and measure the results).

- All product pages. Products are often the main source of the (avoidable!) questions that end up in all of your inboxes. By deploying live chat, you can not only guide customers through their shopping journey but also use the insights to add any information that is missing. Every conversation is a source of insight!
- Your support pages and FAQ page. These are often the first port of call when a customer cannot find an answer to a specific question in a product page or when one wishes to check out your shipping, returns,

main policies, and/or T&C. Deploying live chat in these areas will help customers get their questions answered more quickly and help you strengthen this defense line.

- Your knowledge base (or even community, if you have one) is where shoppers go to get more tricky or detailed questions answered. Of course, customers share their own input too. Deploying live chat here will also let you reduce the amount of effort a customer needs to put in to get their questions answered — which, as we pointed out when customer service myth-busting, is the most effective way of creating loyalty.
- Your blog. Blog content is often the starting point at which discussions around your brand and product develop. If you have a successful blog, this is a great place at which to get even closer to your customers. Deploying live chat here will help you truly become a part of those discussions, rather than just being the initiator.



## Step 2: Live chat on your home page

Deploying live chat on your home page is a bold move and a strong statement of intent to your shoppers. You are, in effect, holding the door wide open and inviting them to speak with you, no matter what the issue or question.

Before deploying live chat on your home page, you must be confident in your ability to deliver what the customer will now expect when they see that live chat window — a quick, friendly and super-effective support conversation.

If you have a brand built heavily around customer service, this is the ultimate proof that you can consistently manage and deliver great conversations across the full customer experience.



## Step 3: Show the world!

If you have gotten this far in the roadmap, then transparently showing your customer service performance — your ability to manage and deliver great support conversations — is a brilliant way of gaining trust and credibility from the start.

- Performance widget. Add a widget to show the percentage of satisfied customers and percentage responses on time. It will be most effective in places where trust is the biggest driver of purchasing decisions — in your cart, for example.

- Service reviews. Showing service reviews is another great way of building trust. If you add reviews or customer happiness ratings into your chat widget, be sure to continually monitor those rating — and adjust your customer service where necessary.

Throughout this stage, when deploying live chat across your full site, always start with reactive chat first. Then, when you see clear opportunities, develop the specific business rules for proactive chat.

And, with that, you've completed the final stage of our roadmap to great conversation.

## Conclusion

With this roadmap, we offered a practical guide to successful deployment of live chat. Even though we placed live chat at the heart of your channel strategy, this roadmap was about much more. In fact, it was about winning the competitive battle with great conversation. Why? As we showed earlier:

1. Your competition is looking the other way:
  - Less than 60% of the Top 500 eCommerce stores<sup>90</sup> use live chat. This opens up a clear competitive advantage for you.
2. More and more customers are trying — and liking — it:
  - By now, around 75% of U.S. shoppers<sup>91</sup> will likely have used live chat.
  - It has the highest customer satisfaction levels<sup>92</sup> of all channels.
  - Live chat offers the quickest response time<sup>93</sup> of all channels.
3. Live chat improves revenues
  - 83% of users say it increases conversion rates<sup>94</sup> by more than 20%<sup>95</sup>.
  - Chatters are 7.5x more likely to convert<sup>96</sup> than non-chatters.
  - Chatters spend more money<sup>97</sup> than non-chatters.
4. Live chat lowers costs
  - It is 4x cheaper<sup>98</sup> than phone interactions.
  - It reduces phone conversation volume<sup>99</sup> by 12%.
  - Live chat helps lower average interaction costs<sup>100</sup>.
  - It lowers rep task time<sup>101</sup>.

With all those benefits, it's clear — smart deployment of live chat is the future of great support conversation.

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