

Operational Excellence Training for Chat & Messaging Agents

IT Solutions

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Running Order

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- Recruiting and Onboarding Digital Agents
- Q&A

Delivering Operational Excellence with Messaging / Chat

Chat vs Messaging Differences

IT Solutions Service Steps

Web Chat vs Messaging

Web Chat	Messaging
Session-based	Continuous relationship
Real-time participation (synchronous)	Asynchronous communication
Tied to conversation	Can come and go from conversation
Time-bound	On customer's time
Transactional	Ongoing conversation
No conversation history	Searchable, browsable history
Lower CSAT, average of 74	Higher CSAT, average 84, peaking to 95
2 or 3 concurrent chats per Agent	10 / 20 / 30 / 40 concurrent conversations
Web and mobile web	Web, mobile web, mobile app, SMS, Social Messaging (Facebook, WhatsApp)

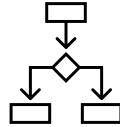
Anatomy of a Messaging/Chat Conversation

5. Confirm



“Anything else I can help with?” Thank them, encourage customer to fill in the survey, close the conversation

4. Achieve Resolution



Provide detailed answer or solution

3. Clarify



Confirm with customer you understanding, If it's wrong agent goes back to Step 2

2. Understand



Read customers query and understand the intent

1. Acknowledge



Set tone and expectation

Let's talk about Empathy

- It starts with acknowledge
- Dont be afraid to care
- Put yourself in the customer shoes



Messaging / Chat Best Practices

- Dedicated agents
- Set and meet customer expectations for each channel
- Don't assume chat metrics align to messaging
- Close conversations when natural conclusion is reached
- Agent behaviours - online rate; transfer rates
- Repeat contact analysis
- Commitment to Digital Channels Messaging / Chat etc



Messaging Neighbourhoods



WFH for Messaging Neighbourhoods

Working from Home (WFH) doesn't end the idea of Messaging Neighbourhoods.

This can still be achieved by use of Teams, Google Hangouts etc to share info, and help deal with customers in a lower-pressure scenario.

Agents in the phone (and to some extent the Web Chat) environment do not have this luxury



Working from Home (WFH)

WFH Messaging / Chat Best Practices

WFH Messaging / Chat Benefits

Set-up Easier to set-up than voice connections

Noise disruptions Background noise – pets, doorbell, children don't matter

Connectivity Particularly in Messaging, brief drops in connection will not kill the conversation



WFH Messaging / Chat Best Practices

- Neighbourhoods
- Breaks
- Communications
- Feedback & Guidance
- Promote Team Spirit



Recruiting and Onboarding

What are you looking for when recruiting good Messaging Agents?

Where to Start

- Get the right people
- Grow a good reputation
- Continuous training and feedback
- Put your candidates to the test



Recruiting Great Messaging Agents

- Language standards
- Written communication skills
- Typing Skills (WPM requirement)
- Multi-tasking
- Technology know-how
- Spot opportunities to go above and beyond
- Flexibility



Onboarding – Messaging Agents

Time

Be patient and allow time to adapt – there is a lot to learn. Messaging is an entirely new world.

Concurrency

Start these Agents off with a lower concurrency, as they are used to one-to-one customer service. Gradually increase Target KPIs when agent becomes more experienced



Onboarding – Messaging Agents

Review

Spend time having one-to-one performance reviews with these Agents (through use of conversation transcript analysis).

Feedback

Get detailed feedback about your training and onboarding from inductees. This can really help you improve your processes in future.



Q&A

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