



RDI
MARKETING SERVICES



Win BIG with Chat

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Text Chat

Yes? - No? - Maybe?

This session is designed to help you get the most out of Text Chat by:

- Defining the need for Text Chat
- Determining the benefits to Text Chat
- Outlining 10 Steps to Guarantee a Successful Implementation
- Case Study

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Customer Attitudes

- 20% of customers come away from contact center interactions with unresolved issues*
- 53% of these customers are likely to defect to a competitor*
- Most customers believe poor service is caused by the call center agent
- In fact most poor service interactions are created by lack of technology and processes provide to the contact center agent

*CFI Group, Inc, 2008

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Customer Retention

- Retaining customers is vital especially in a downward moving economy
- Customer attrition averages 10% per year across all industries
- Firms can no longer compete on price or product offerings alone
- Companies *must stand out* from the competition

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The Need for Text Chat

Customers

- Expectations are increasing - to compete you must meet these demands
- Desire the ability to decide **when** and **how** they will communicate with your firm

Organizations

- Must Improve Customer Service
- Find ways to reduce costs
- Retain Customers
- Increase Revenue

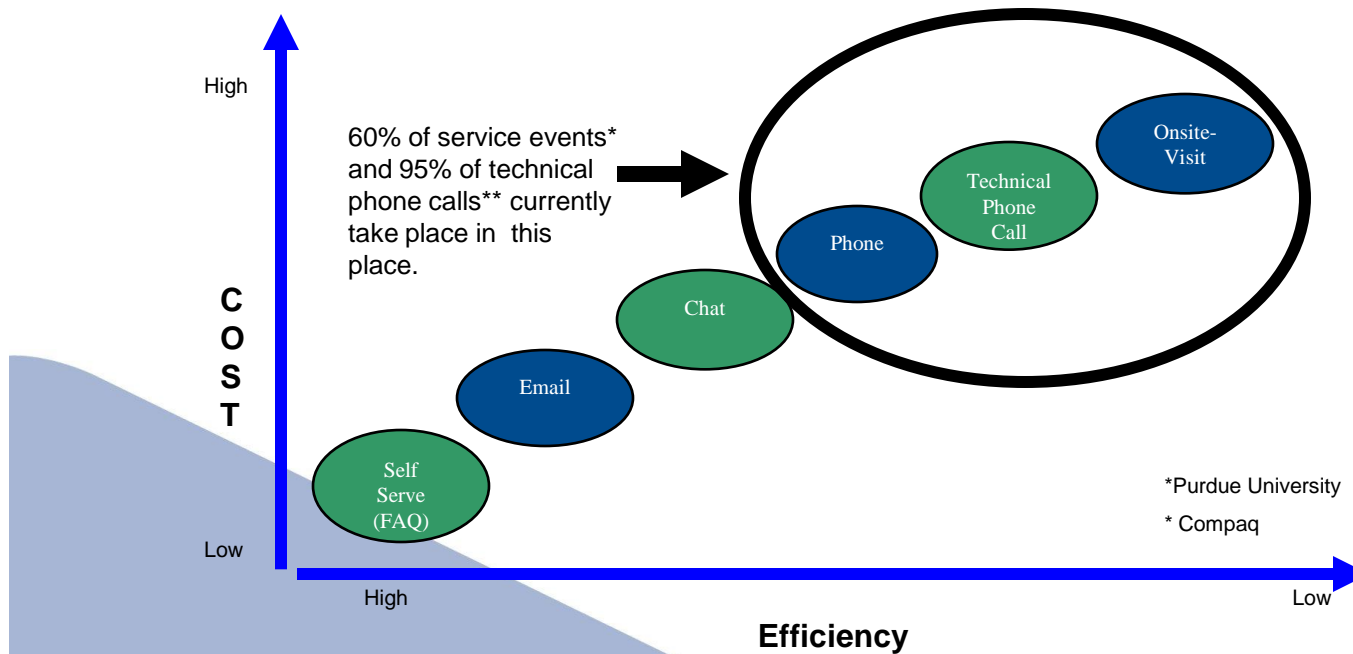
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Reduced Cost - Increased Revenue

- Cost - The cost of a customer service interaction by phone is approximately \$33 as compared to a chat session at approximately \$10 (Source: Forrester Research)

- Most Customer Service Interactions are in the High Cost Zone



- Increases Agent Utilization
- Increased Revenue Opportunities
- Access to a New Generation of Customers

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Unique Advantages/Benefits of Text Chat

Customer Service Tool

- Increased Customer Satisfaction - Studies indicate clients prefer chat over phone interactions 64% versus 44%. (Source: Horizon Research)
- Improved Quality Through Standardization of Responses
- Real Time - Customers can obtain help when they need it
- Documented History: Chat transcription is emailed to the customer, which provides the customer the information discussed on the call.
- Nimble, Flexible: Service reps can access a variety of tools such as web links, files, and knowledge bases quickly
- Integrated: Works with email and phone

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10 Steps to a Successful Text Chat Implementation

Step 1: Know Your Marketplace

- Does your competition offer text chat?
- Is text chat access limited to certain time periods?
- Is text chat limited to premium customers only?
- Does your competition promote text chat as an advantage of their service or product offering?
- How long does it take an agent to answer your initial request to chat?
- Are you offered the opportunity to chat proactively?
- How long does a typical session with an agent last?
- Does the agent offer to email a copy of the session to you?
- Are the responses canned or does the agent respond to you with information that answers your individual question?

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Step 2: Be Customer Focused

- Does your customer expect the ability to chat with your agents?
- Is your product or service oriented toward customers who are more likely to use newer?
- Methods of technology? For instance do you market insurance to the population who is over 65?
- Ask your customers and prospects how they prefer to interact with your organization.
- Be innovative - if you offer text chat will you be viewed as innovative in your industry?
- Can text chat provide a method to up sell or cross sell solutions that your customers want in a non threatening manner?

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Step 3: Create a Blueprint for Success

How does text chat fit into your firms overall business goals?

- Evaluate existing resources - Will a text chat tool easily integrate into the present system you are using?
- Do you have buy in at all levels of your organization to implement this customer channel?
- Get feedback from the contact center staff - after all they will use the software more than anyone
- Consider the human resources you have in your call center presently? Will they be able to easily adapt to a written method of communication? Are they technologically savvy themselves?
- Important - what is your **personal** goal in implementing chat? Is it to make your contact center appear advanced to upper management? Or is there a real business need for text chat?

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Step 4: So the Answer is YES - Who Has the best solution?

- Does your present software vendor offer text chat?
- Seek out proven Best in Class Vendors
- Solution should allow the ability to integrate with self service, phone, email and other methods of customer interaction
- Does the solution support multiple languages?
- How long has the vendor been offering a text chat solution?
- Can the solution meet heavy workload periods?
- Will the solution allow for multimedia queuing?
- What tools are available for monitoring text chats?
- Can reps chat with more than one customer simultaneously?

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Step 5: Start Smart

- Implement with a select group of agents
- Limit hours for text chat
- Consider limiting the rollout to **Premium Customers Only**
- Train your agents
- Implement on a flexible schedule

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Step 6: Help your agent be successful

- Initial emphasis should be on **Quality not Quantity.**
- Group similar skills
- Get feedback from your agents
- Provide agents with an adequate knowledge base
- Educate agents on how to move complex issues to other forms of interaction such as email or written correspondence
- Keep agents motivated with backup activities

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Step 7: Track Success, Track Failure

- Create your own Best Practices
- Set Metric Goals Realistically
- Track Metrics
- Report and give constant feedback to your organization
- Ask your customers for feedback



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Step 8: Test and Monitor

- Fully Test solution before deployment
- Have a backup solution if the chat queues are overloaded
- Overstaff for the first 30 days
- Monitor reps interactions
- Be prepared to make changes

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Step 9: Market Your Text Chat Function

- Promote chat on your website
- Include live help links on emails, letters, and other promotional material
- Combine Text Chat with Phone calls to enhance the customer experience
- Direct your customers to text chat during peak call periods by using IVR and ACD messages

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Step 10: Look for new applications for Text Chat

External

- Add additional customer base
- Open up hours of service
- Add tools to the knowledge base such as video that the rep can push to the customer
- Completion of Order Forms (Co-Browsing)
- Communication with Subject Matter Experts in your firm

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Step 10: Look for new applications for Text Chat

Internal

- Agent to Supervisor
- Agent to Client Subject Matter Expert
- Supervisor to Brick and Mortar Agents
- Supervisor to Remote Agents
- Short Training Opportunities
- Quality Assurance during monitoring sessions
- All Staff Communication
- Meeting support with clients

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Conclusion

- Text Chat is an Important Element of A Multi-Channel Customer Contact Plan
- Build The Case for Text Chat On Cost Savings **AND** Improved Customer Service
- Deploy Only One Multi-Channel Element at a Time
- Prepare Your Company Culture Before Deploying Text Chat

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Conclusion (cont)

- Select A Best In Breed Vendor
- Vendor Should Allow Company to Add Web Chat Features Following Text Deployment
- Find the budget and the ROI will follow!

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Questions?



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