

Messaging best practice: Predefined content

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Overview

Predefined content gives your brand the ability to develop canned responses that accurately reflect your brand's voice and business needs. Brands can add as many personalized responses as they need in order to respond effectively to consumers. This best practice guide takes you through LivePerson's recommendations on how to structure your predefined content, along with deciding tone and how to most effectively use hot keys.

Structuring predefined content

- Name your responses well
 - Ensure that you name your response with something that is easy to search/understand for your agent and is specific. Aim to use language the agent would use. I.e. do not call the response ResponseOption2, or SC4200T.
- Number your responses
 - The system will automatically order the responses alphabetically. Place a number in front of your responses to keep these in your desired order for each category.
- Keep categories succinct and specific, and in the same order as the conversation flow.
 - Only create as many categories as is needed. Keep these to a minimum and ensure these follow the conversation structure to help support your agent.
- Don't create too many responses
 - It's very easy to want to create a response for every eventuality. It is much better to start small and grow the responses as needed than to overload the agent with too many options.
- Consider if a link may do a better job than the response
 - In some cases, the customer experience may be enhanced by sending a link. The website may better support and explain a process/procedure/product than through a predefined response.
- Allow responses to flow as per your process flow
 - If you have a process that needs to be followed, ensure the responses mirror this order.
- Keep manual input for the agent to a minimum
 - Where possible, create the responses in such a way that the agent does not need to add in personalized extra information. (e.g.: I've just looked into that for you 'insert Customer name').

Establishing tone and content

Consider that messaging requires short, to the point and conversational responses.

- Short and to the point

MESSAGING BEST PRACTICE: PREDEFINED CONTENT

- Keep responses succinct and to the point. It is not good practice to send large responses/paragraphs. Consider the size of the screen the customer will be using to read the response.
- Mirror the brand tone
 - Ensure that the responses are not too process driven, and that these mirror the brand tone. A good 'go to' for guidelines for this would be any social brand guidelines within the business, as these are the closest to messaging requirements.
- Keep the language conversational
 - You want to ensure that the responses sound natural and that the agents will be comfortable injecting these into their conversations. If these are too robotic or scripted, the customer experience is hampered and the agent is less likely to use responses.
- Use contractions and everyday language
 - Language use greatly effects the tone of the responses. Keep this to everyday language, and use contractions to help cement this. E.g.: 'I am happy to assist you with this' could be: 'I'll be happy to help.'
- Use character limit and natural line breaks
 - Keep in mind that certain devices have a character limit. Ensure that links do not fall over this limit as they will not work for the customer if incomplete.
- Manage expectations
 - Help support your agent with responses that manage expectations. Instead of, 'This will take 5 minutes, could you please wait?', consider 'I'll get back to you when this is done.' Also, have responses ready to set the scene for customer if there is a lot of data or many questions coming their way.
- Ensure that you have responses explaining what messaging is. We suggest a strong opener.
 - Your customers will need an introduction to messaging. We suggest that an opening response explaining messaging is used.
- More than one question at a time
 - It can be frustrating for your customer to have to answer lots of questions. For messaging, consider asking up to three questions at one time, but no more. For example, "Can I please have you name, phone number and address?"

How to most effectively use hot keys

- Assign hot keys to the most used responses
 - In order for these short cut keys to be effective, these should only be assigned to a number of responses. Try to ensure that these are assigned to the most likely to be used responses.
 - As your team becomes accustomed to predefined responses, you may find it necessary to add more. Consider that the agent needs to remember these short keys and so you don't want to overload them.
 - It may be useful for new agents to have a printed list of these responses to refer to.

MESSAGING BEST PRACTICE: PREDEFINED CONTENT

- Assign hot keys to mirror a process
 - Hot keys can be very useful if assigned to a commonly used process.
 - E.g. Step 1, step 2, and step 3 could be assigned S→1, S→2, S→3

Operational best practices

- A. Predefined content should be regularly reviewed.
- B. Ensure agents are being coached and trained to use the content from launch.
- C. Involve your agents in the process of refining responses.
- D. Delete responses that are not being used.
- E. Allow agents time during training to align themselves with the new responses.
- F. Consider adding great responses from transcripts.

Predefined content examples

Set the expectations of asynchronous messaging

First time customer:

- Welcome to our new messaging service! No need to worry about staying glued to your device for an answer, messaging means that we can converse when it suits you.

Expectation setting for SLAs

- I'll get back to you when that's done.
- Feel free to go about your day and I'll ping you when that's ready.
- Just a reminder that we'll let you know when that's done, so no need to wait around for my response.

Expectation setting for lunches and breaks (only necessary if dealing with an active conversation)

Note: assuming that when a customer is unhappy to wait/it is clear to the agent that it is an active urgent conversation, the agent will reassign the conversation to the queue. You may want to consider a 'welcome back' type message for returning customers.

- I'm just headed out on a break, so we can pick up again in a bit.
- I'm off to lunch shortly. I'll be back in an hour and we can pick up again then, or I can assign you to a colleague if you need a more urgent answer.
- Just to let you know, I'm heading to lunch in a bit. If you think you'll need a response before then, I can assign you to a colleague. If you're happy to wait to reconnect with me, we can pick up again when I'm back.

-

Transfer to a different queue

- Looks like one of my colleagues will be able to pick this up with you in more detail, as this is their specialty. I'm going to pass you over to them now. (Set expectations of response time).
- I'll need to transfer you to a different team for this. The good news is that they are on messaging too! So, I'll transfer you their department and they'll be in touch soon.

MESSAGING BEST PRACTICE: PREDEFINED CONTENT

Transfer to the same queue (i.e.: reassigning to the queue)

- One of my team will be with you shortly to pick up where we've left off.
- It's the end of my working day and I can see that we need to get this sorted for you. Instead of picking up again tomorrow with me specifically, I suggest that I transfer you to a member of my team who will be able to pick up from where we are now.

Closing a conversation

Closing a conversation that is idle

- If you need to speak with us again, just restart the conversation by replying to this message.

Closing an active conversation

- Thanks for using our new messaging service. Have a great day!

ID&V

- I'll need to get a few details from you before we can start, just to make sure we get you authenticated.
- I'm happy to help. I just need to take a few details from you first.
- I'll need to ask you a few quick questions, just to make sure your account is secure.

Suggestion: ask for two to three pieces of information at a time. E.g.: Can I please have your name, date of birth and address?

Communicating end of day/closure for brands not available 24/7

- Just to let you know, our messaging service closes in about 20 minutes. We will re-open tomorrow at 8:00 AM. Would you like to pick up again tomorrow or would you prefer a phone number for our call team?
- If you are willing to wait, I'll be back at 12:30 PM. We can pick up then or I can assign you to a colleague who can speak with you before then. (Don't worry, they will have this messaging history). What would you prefer?

It is best to let the customer know about 20 minutes before the end of the shift. The assumption is that the agents are reassigning conversations at the end of the day.

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