

Messaging Best Practice for Agents

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Introduction

This document outlines some of the common issues that messaging agents may face and the best practices that we recommend in order to optimize the agents' efficiency.

Common questions and LivePerson's recommendations

I've got a lot of conversations on my screen and I'm finding it difficult to focus. What should I do?

You can hide conversations when the conversation is no longer active. No longer active refers to the state in which the customer is not messaging you within regular intervals. Hiding the conversation doesn't close the conversation; it only hides it from your view. It will reappear along your message bar when the customer responds.

I want to go on my break in 10 minutes. What should I tell my customers? And, do I need to do anything with my manual SLA?

If there is a very active conversation, you can tell the customer you are taking a break. You can give them the option to wait, or to be transferred to another agent.

Note: due to the SLA and general demand, transferring to another agent may include a longer wait time for the customer before he is served.

I want to go on a lunch break, which is a 45-minute break. Should I tell my customer?

For your active conversations, you should let them know that you are going on a break and give them the option to wait or to be transferred to another agent.

It's not always necessary to tell all your customers you are going on break, be aware of which customers this is relevant to. Apply common sense approach.

Note: due to the SLA and general demand, reassigning the customer to the queue may mean a longer wait time before the customer is served.

It feels like my active conversations are more than I should have. Should I change my status to away?

Please do not change your status to away. This will confuse the system that is working very hard to ensure that you are not overloaded.

Messaging is designed to have you handle multiple conversations at once. There is a smart algorithm working in the background to try and ensure that you are not overloaded. You'll have a mixture of active and inactive conversations.

It can feel like you are taking on too many conversations at one time, especially because it is new. It is normal to have a large amount of conversations throughout the day, and this will take some getting used to.

You should go on away for lunch and breaks only, not to control the queue.

What do I do if I get a conversation in my queue that my colleague handled yesterday? Do I transfer it to them?

No, please do not transfer the conversation. We want to avoid transferring as much as possible. The only case where this is considered within the same skill is if the customer specifically asks for the previous agent. Even then, this needs to be for a very good reason. Always offer to help instead. In most cases, you should have the messaging history of that customer.

The system will automatically do its best to route the conversation to the last agent who dealt with it, but if they are not available, due to shift patterns or load percentage, then the system has decided that you have the better capacity to handle this conversation.

What should I do if a customer tells me that they'll come back in a few hours? Should I change my manual SLA?

Once you have responded to the customer (the conversation is then no longer pending), you should hide the conversation. It will become inactive and will reactivate when the customer returns and responds. Feel free to ask the customer to respond when they are ready so that the conversation becomes active again.

When should I return a customer to the queue?

Your brand should decide with your LivePerson representative when this is best for them. Some brands decide that this should be the case at the end of your working day. This is so that your customer can continue to get the help they may need after you have finished your shift. If you fall ill, or are not scheduled to be in the next shift, someone else can help your customer complete their query. Please speak to your team manager for more information.

Should I ask the customer to ping me when they're back and ready, or should I be chasing them?

You should always ask the customer to 'ping' you when they're back, so that the conversation is shown as active on your system. However, if it has been a while since you have expected to hear from your customer, then it may be worth checking if they still need help.

What should I do if I don't hear from my customer in a few hours?

You should check if the customer is still available or wanting to talk. If not, after a reasonable amount of time has passed, you can close the conversation. The customer can always open the conversation again easily, and you should make this clear in your closing predefined content.

When is it 'safe' to close a messaging conversation?

When a customer confirms a resolution, or when you have waited the appropriate amount of time after checking if they are still present.

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Remember, they can always restart the conversation. You won't always have a customer confirm a resolution, and you may have customers who call in and complete the query with another channel. If you have an unresponsive customer over a certain period of time, the system will close this for you.

Note: In-app customers may have a slightly different behavior. If push notifications are enabled, the customer might not need to be in the app to see your response.

Do we close a conversation if the customer comes back in over 12 hours?

You can allow this conversation to become inactive. If you plan to pick up the conversation the next day (and you will be on shift in time for their response) then this can stay in your list. If you will not be available, you should reassign the conversation at the end of your day.

Can I transfer a chat to another messaging department?

There are other skills available on messaging. Speak to your Team Manager to understand when and to which skills you should transfer a customer.

Is there a shortcut for saying hi to my customer?

There is a predefined content set up with a short cut for you. This differs for first time and existing customers, so make a point of checking this before you choose your hot-key.

We've been asked to respond to the first customer within a minute. How can I do that when I have so many conversations?

Messaging is designed to allow you to multitask. You should be able to click the new conversation, send the first response which is a hot-key, and return to your current message. It will take some time to get used to prioritizing and multitasking.

What should I do if a customer wants to speak to the manager?

We suggest that you transfer to your team manager. This way, it removes the conversation from your list so that you can speak to a new customer instead.

Is there a predefined response that explains that the customer is being transferred to a new team?

If not, we can draw one up for you. Speak to your Team Manager if you feel that there are any missing predefined responses. Or, if you feel like the language can be slightly changed to make it more user friendly.

What should I do once I have set a manual SLA?

Once this has been met, you should return to default.

What should I fill out in the conversation summary, and should I fill this out every time?

Yes, a conversation summary should be filled out every time. A summary should include information that stood out about the chat, a quick summary would be really useful for the next

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person who deals with this customer again. It saves them from having to read the whole transcript. Keep the summary short and concise.

Should I ask customers to fill in feedback at the end of a conversation?

The system will automatically send out the exit survey. Sometimes it is good for the customer to know that a survey will be popping up as it may also encourage them to fill it out. Most of the time, it is good to let the customer know.

When I login, I get lots of messaging conversations straight away. Is that normal?

This can be normal, depending on the time that you start a shift. If there are a lot of customers in the queue from the night before, you may be busy from when you first login.

What will the visitor see once I set a new SLA?

For Facebook and SMS, the customer does not get any notifications. However, if the customer is using your app, they will get a notification of the SLA response time. Make sure you are only changing the SLA if you need to.

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