How to Select a Digital Conversation Solution

Drive Revenue and Exceptional Customer Experiences

Live chat is one of the most valuable channels for engaging, converting, acquiring, and retaining customers. However, with so many options to choose from it's become challenging for businesses to differentiate between vendors and evaluate potential solutions against business goals and requirements. Use this guide to select and rank your business's priorities, learn more about key considerations to keep in mind, and formulate a list of critical questions to ask potential live chat vendors.

What are your top requirements in a digital conversation solution?

Start thinking about your particular organization and the priorities that matter most to you and other key stakeholders. Use this checklist guide to select and rank your top priorities as you see them now. Then, read on to learn more about various considerations and determine whether any priorities have changed.

- [ ] I want more than technology - I need a partner with a true expertise in digital conversations

- [ ] The solution needs to meet specific security, data privacy, and/or compliance requirements

- [ ] I want to use chatbots and automation to scale in a cost-effective way

- [ ] The solution must comply with my organization's legal and uptime policies (MSA, SLA, etc.)

- [ ] I need to make data-driven decisions about our ongoing chat processes, performance, and strategies

- [ ] I want to use conversations to amplify growth and nurture lasting customer relationships

- [ ] I want to connect with our target audience and/or clients across multiple channels and social media

- [ ] I want to engage and follow-up with leads and clients using a CRM and/or Help Desk integration

- [ ] I want to ramp up quickly and successfully with full-service onboarding, training services, etc.

- [ ] I need to customize the chat solution to adhere to my company's marketing brand standards

- [ ] I want to proactively engage with leads and/or clients at key moments in their customer journey

- [ ] I want quality customer service (perhaps spanning multiple timezones and languages)

- [ ] I have additional solution requirement(s) not listed here

Learn More About Key Considerations

Leverage Chatbots and Humans for 24/7/365 Customer Service

Chatbots offer the ability to effectively scale your team without adding headcount. Chatbots and AI solutions can look very different, as automation means different things across the conversational technology spectrum. Before going into research and demonstrations, strategize your dream chatbot scenario and ask to see how providers address it. Chatbots can qualify leads, answer frequently-asked-questions, schedule meetings, and more.

Combine chatbots and humans to minimize repetitive agent activities and drill down on the most important tasks. What resources are you prepared to devote to automation? Some providers offer professional services to build a custom chatbot for you, others require that you create and build a bot from scratch, and others have a combination of the two. Prior to a meeting about automation, decide what teams will benefit most from automation and how chatbots will fit into existing workflows so they won't hinder current workflows.

Convert and Retain with Integrated CRMS and Help Desks

Your business's Customer Relationship Management platform (CRM) and Help Desk serve as the unifying hub for all sales and customer service engagements. Integrating website chat with your existing CRM and/or Help Desk makes it easier to convert MQLs to SQLs, optimizes the chat solution, maximizes the efficiency of your sales and customer service teams, and automates the flow of live chat data directly into your preferred platform(s).

Workflows/automation, incoming lead data, ongoing client communication and more all exist within these platforms. Therefore, it's critical for sales and support professionals to choose a chat software

solution that integrates seamlessly. It's also important to consider future sales and customer service operations. For example, will you be migrating to a new CRM or Help Desk in the next few months?

Some providers even offer custom-mapping capabilities so that users can map and send live chat data automatically to appropriate fields for additional lead routing/segmentation and reporting capabilities. Dedicated live chat software that offers robust integrations with popular CRMs and Help Desks is key to long-term live chat success.

Chatbots & Automation
Be there when you can't be.
Drive operational efficiences.

Multi-Channel, Integrations
Reach customers where they are.
Integrate with your technology ecosystem.

Conversational Technology

Agent & Team Management
Build conversations around your organization and needs.

Analytics
Monitor your performance.
Gain insights.

Find a Solution Tailored to you and Ramp up Smoothly

Researching, evaluating, and purchasing software and services for your business can be a challenging task. Choosing the best fit solution for your unique needs can and will have a lasting positive impact not only on your sales and customer support teams, but on your entire business.

While researching and evaluating live chat providers, take note of initial impressions and telling indicators about how they conduct business with prospective clients and current clients. Does it take the chat vendor a few minutes or hours to respond to your inquiry, or a few days? Does the sales representative take a consultative approach to meeting your business's engagement needs, or are they simply rushing to close a quick deal? Does the company offer full demos of their product, or is a free trial the only option to preview the software? The answers to these

questions and more will give you an accurate preview of what an ongoing business relationship will be like.

Don't hesitate to ask chat vendors' sales representatives upfront about their particular sales process and what to expect at each stage of the buying cycle. If the chat vendor cannot outline a clear, established sales process so you understand what to expect, it's time to keep looking. It's also critical to research and understand the post-sale experience and have a well-informed understanding of what kind of professional services the vendor offers (such as onboarding/implementation, chat agent/admin training packages, client success managers, ongoing business reviews, etc) to get your business up and running with live chat as fast as possible and ensure long-term success.

Improve Engagement With Omnichannel Functionality

Sales and customer service teams need to be able to communicate with prospective buyers and current clients wherever they are. Today, more and more consumers routinely engage across multiple channels. Be sure to ask prospective vendors about their multi-channel capabilities. The more avenues you have to reach prospective clients and your existing customer base, the better. Popular channels integrated with live chat include Facebook Messenger, Twitter, Click-to-Call, SMS-to-Chat, WeChat, and many others. It's also important to understand mobile capabilities.

Double-check that the solution(s) you're considering offer mobile-optimized visitor chat to provide a quality user experience for the increasing numbers of mobile business interactions.

If you are an international organization, ask about auto-translation capabilities. You can't speak every language, but your digital conversation platform can. Two-way translation ensures nothing is lost on either side of the conversation.

Acquisition
Engage and convert visitors.

Adoption
Guide your clients and empower your support team.

The Customer Journey is a Conversation

Retention
Happy customers forever!

Expansion
Transform your client success team into value creators.

Keep Your Business Secure and Compliant

One of the most important considerations when researching and evaluating digital conversation providers is your organization's internal security, privacy, and compliance protocols. For many midmarket and enterprise businesses, these types of requirements are simply non-negotiable and their chosen live chat vendor must comply. Meet with internal stakeholders such as your information security officer (ISO), legal team, andengineering team to understand your requirements fully. If you are located in the European Union (EU) or handle the data of EU citizens, seek out a chat provider that offers GDPR compliance, dedicated EU instances, and adherence to Privacy Shield. If you're located in the USA and your organization handles sensitive protected health information (PHI), seek out a chat provider that offers a HIPAA-compliant chat solution.

Other security features you may need include: secure data transfer, secure credit card collection/masking, Single Sign-On (SSO), SSL encryption, dedicated instances, and MSAs/SLAs.

Quality Customer Service is Paramount

It's also critical to research and understand the post-sale experience and have a well-informed understanding of what kind of support you can expect after you become a client. Luckily, today it's easier than ever to conduct comprehensive research on a vendor with testimonials, client case studies, third-party software review websites (G2 Crowd, Capterra, etc), and more. You can also investigate average customer satisfaction (CSAT) ratings for vendors and ask them whether or not they have received any awards or other third-party recognition for their customer service. Investigate where their offices are located and timezones/hours covered, supported languages for assistance, and how to best contact the company's support team.

Optimize Performance with Reporting and Analytics

As with any marketing, sales, or customer service endeavor, tracking performance via analytics and reporting is a central, ongoing component of a successful live chat software implementation. Choose a live chat provider that helps you track marketing, sales, and customer service KPIs related to your website chat strategy directly within the chat tool. A robust chat solution will be able to track metrics such as incoming leads from live chat, proactive vs. reactive chat ratios, average response

time and performance of sales and service agents, chatdurations, audience information, capacity reporting to optimize staffing resources, and more. Your team will be able to analyze these metrics to help you make data-driven decisions and about sales and customer service strategies and processes, and the business as a whole.

Increase Engagement with Proactive Messaging

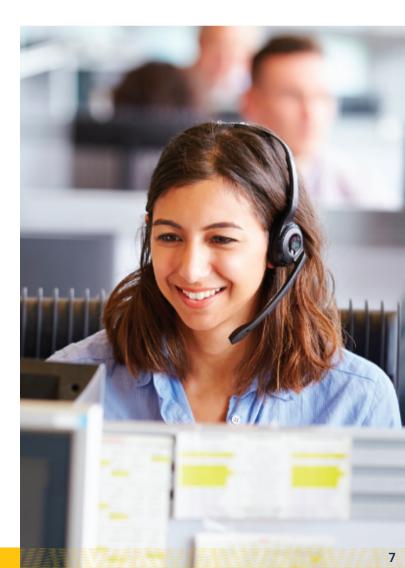In the world of sales and customer service, the importance of timing cannot be overstated. Selecting a chat software provider that offers advanced proactive messaging capabilities will boost your website chat engagement rate while simultaneously boosting internal efficiencies.

It will also help your sales and support teams reach out to prospects at exactly the right moment when interest is piqued or assistance is needed. Proactive messaging simply refers to the ability for a business admin to set up predefined custom chat messages that automatically trigger based on a host of criteria.

Criteria can include everything from visitor's current URL, visitor's time on page, visitor's previous URL view(s), custom Javascript variables, and many others. Use proactive chat to initiate conversations with active website visitors browsing your website at the perfect moment or even to initiate client conversations in-app and behind a login. Once the website visitor responds, they will be immediately connected with a member of your chat agent team.

Seamlessly Match Your Brand

As industries become saturated with competition, each component of the user experience plays a key role in ensuring that companies stand out and get noticed. While the first impression pre-sale may start with a name or logo, the other elements of the user interaction (such as live chat!) all work together to continue shaping this overall impression long after the lead becomes a client. Branding is no longer limited to a single element of design such as a snazzy logo. It's become a top-to-bottom experience. Select a digital conversation solution that offers full customization and easy-to-use, intuitive design tools to compliment your brand image.

Choose a Scalable, Stable Chat Platform

As your sales and client service/success efforts grow, it's important to select a robust chat provider that scales easily with your teams (and your entire business) to accommodate changing needs and requirements.

A great live chat platform makes it easy to add new agents, chatbots, and entirely new departments, complete with custom canned messages and routing to best support your existing workflows.

Consider providers that offer a Service Level Agreement (SLA) for additional peace of mind. Be sure that prospective chat vendors are transparent about discussing uptime statistics with you regardless of whether you sign an SLA.

Harness the Power of a Dedicated Chat Solution

Many companies tack a live chat feature onto another service (like a CRM or Help Desk software), but the best solution is one that specializes in live chat.

Well-established, dedicated chat providers have a clear advantage over chat add-on products as they have a longer history of innovation and meeting clients' needs, and they understand the nuances of live chat better. If a provider doesn't use their solution, best to look elsewhere.

Key Questions to Ask During the Digital Conversation Buying Process

Use this list throughout the research phase and purchasing process to ensure you select a digital conversation provider that meets your needs. This list is not all-encompassing but serves as a great starting point.

- What types of automation are available? What is the process for implementing chatbots? How do chatbots coexist with my current team and workflows?

- Which platforms does your solution integrate with?

- Does it offer custom mapping capabilities? What is the process to set up the integration? Do you offer a dedicated chat solution or is it an add-on feature?

- Does your chat solution also integrate with multiple channels and/or social media platforms?

- How does your solution scale as we grow? What is your average uptime? Do you offer SLAs and MSAs?

- Can we customize the chat platform using an intuitive design tool? How much time will this take?

- What kinds of in-app reporting and analytics does your platform offer? How do your clients track sales KPIs using these reports?

- Does your solution offer advanced proactive messaging? What types of triggers can we set up? How customizable is it?

- Does your solution offer HIPAA and/or GDPR compliance? What security features are associated with your platform? Do you offer dedicated instances? How can we be sure that our data will be secure?

- What does the setup process entail and how long does it usually take? Where are your offices/team(s) located and what are their hours of operation? What language(s) do they speak? Has your customer service team received any third-party recognition? What kinds of CSAT information can you share?

- What is the sales process like? Does your team offer any post-sale on-boarding and training services? Will I have access to a client success team? How will you ensure that we're set up for long-term success? Do you offer any ongoing business reviews/checkins to track our progress against goals?

TeamSupport

We're messaging and live chat experts so you don't have to be.

Our messaging and live chat platform built to enterprise-class standards is designed for forward-thinking B2B mid-size companies that recognize the power of conversation to build strong customer relationships and drive sales. TeamSupport provides industry-leading chatbot automation, advanced routing and brand customization, and more – but what sets us apart is our team of experts that ensure your chat platform is always operating at peak performance.

Click here to schedule a demo with one of our experts.