



eGuide:

How to Select a Live Chat Solution to Drive Leads and Growth



Top Considerations For Sales And Marketing Professionals

Live chat is one of the most valuable channels for engaging, qualifying, and converting leads. However, with so many options to choose from, it's challenging for businesses to differentiate between vendors and evaluate which solution best suits their unique needs.

This guide serves to make the decision process easier by enabling you to rank your business's priorities and requirements, learn more about key considerations to keep in mind, and formulate a list of critical questions to ask during the buying process.

What are your top requirements for a sales engagement solution?

Start thinking about your particular organization and the priorities that matter most to you and other key stakeholders. Use this checklist 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 to capture MQLs, convert to SQLs, and close deals faster with advanced CRM integration
- I want to triage and correctly route existing customers' support requests and questions
- I want to connect with our target audience(s) across multiple channels and social media
- I want to ramp up faster and more successfully with full-service onboarding, training services, etc
- The solution needs to meet specific security, data privacy, and/or compliance requirements
- I want quality customer service (perhaps spanning multiple time zones and languages)
- I need to make data-driven decisions about our ongoing chat processes, performance, and strategies
- I need to customize the chat solution to adhere to my company's marketing brand standards
- I want to proactively, automatically engage leads at key moments in the sales process
- The solution must comply with my organization's legal and uptime policies (MSA, SLA, etc.)
- I prefer to use a dedicated, established chat solution vs. a chat add-on product
- I have additional solution requirement(s) not listed here

Learn More About Key Considerations



Close Deals Faster With An Integrated CRM

Your business's customer relationship management (CRM) platform serves as the unifying hub for all inbound and outbound sales efforts. **Therefore, it's critical for sales and marketing professionals to choose a chat software solution that integrates seamlessly with your existing CRM.**

Integrating website chat with your existing CRM makes it easier to convert MQLs to SQLs, seamlessly integrates the chat solution with your existing lead workflows, helps reps close deals faster (leading to shorter overall sales cycles), and completely automates the flow of live chat data directly into the CRM.

Some providers even offer custom-mapping capabilities so that users can map and send

live chat data automatically to appropriate CRM fields for additional lead routing/segmentation and reporting capabilities.

Dedicated live chat software that offers robust integrations with CRMs like Salesforce, MS Dynamics, SAP, and more is key to long-term live chat success. It's also important to consider future sales operations and whether your business has any plans to switch CRMs within the next 6-12+ months.

Drive MQLs And SQLs With Omnichannel Functionality

Sales teams need to be able to communicate with prospective leads and buyers 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, the better. Popular channels integrated with live chat include Facebook Messenger, Twitter, Click-to-Call, SMS-to-Chat, WeChat, Zalo, and many others.

It's also important to understand mobile capabilities. Double-check that the live chat solution(s) you're considering offer mobile-optimized visitor chat to provide a quality user experience for the increasing numbers of mobile visitors that many businesses interact with.



Find A Solution Tailored To You And Ramp Up Smoothly

Choosing the best fit solution for your unique needs can and will have a lasting positive impact not only on your sales team, but on your entire business due to better, happier customer experiences. While researching and evaluating live chat providers, take note of initial impressions and how they conduct business with prospective 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' sales 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 about their particular sales process and what to expect at each stage of the buying cycle. If the prospective vendor cannot outline a clear, established sales process, it's probably time to keep looking.

Keep Your Business Secure And Compliant

One of the most important considerations when researching and evaluating live chat 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. Meet with internal stakeholders such as your information security officer (ISO), legal team, and engineering team to understand solution 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 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



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. Ask about where their offices are located and timezones/hours covered, supported language(s) for client assistance, and how to best contact the company's support team.

Optimize Performance With Reporting And Analytics

As with any sales and marketing 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 and sales 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 chat performance of sales agents, chat durations, audience information, capacity reporting to optimize staffing, and more.

Your team will be able to use these insights to help you make data-driven decisions about sales strategies and processes, and the business as a whole.



Increase Engagement With Proactive Messaging

In the world of sales, timing is everything. Selecting a chat software provider that offers advanced proactive messaging capabilities will boost your website chat engagement rate while simultaneously boosting internal efficiencies and reaching out to prospects at exactly the right moment. 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 – enabling you to get ahead of the conversation. 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 key moments during the buyer journey. Once the website visitor responds, they are immediately connected with a member of your inbound sales 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 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 initial impression. 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 chat solution that offers full customization and easy-to-use, intuitive design tools. This will ensure the solution upholds your marketing brand standards and provides a unified customer experience.

Choose A Scalable, Stable Chat Platform

As your SDR/BDR and Account Executive teams grow, it's important to select a robust chat provider that scales easily with your sales team (and your entire business) to accommodate changing needs and requirements.

A great live chat platform makes it easy to add new agents and entirely new departments, complete with custom canned messages and routing to best support your 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 stack a live chat feature onto another service (like a CRM software), but the best live chat providers are ones that specialize in the field. 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 understand the nuances of live chat better.



Key Questions to Ask During the Live Chat Buying Process

Use this list throughout the research phase and purchasing process to make sure you select a live chat provider that meets your needs. This list is not all-encompassing but serves as a helpful base to start with.

- Which CRM(s) 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 solution or is it an add-on to another product?
- Does your chat solution integrate with multiple channels and/or social media platforms?
- What is the sales process like? Does your team offer any post-sale onboarding 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/check-ins to track our progress against goals?
- 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 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 system offer segmentation capabilities?
- Can we customize the chat platform using an intuitive design tool? How much time will this take? How does your solution scale as we grow? What is your average uptime? Do you offer SLAs and MSAs?

Navigating through the vast supply of live chat vendors can be a daunting task – but this guide should relieve some of those challenges by empowering you to prioritize your business goals and requirements, and know what to look for in vendors.



TeamSupport's Messaging & Live Chat platform can help you realize your goals and bring them to fruition.

Contact us today to learn more.

[Contact Us](#)

