

Live chat staff guidelines



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Message length

Generally try to keep messages short. That means less time for the customer to be sitting around waiting for you to type. It's generally not necessary to only send complete sentences at once. People expect quick replies over and above perfect grammar.

Punctuation

Start every sentence with a capital letter.

No need to use full stops at the end of sentences, unless there are multiple sentences in your message.

Using the customer's name

Situation	Text
If we know the customer's first name, please use the customer's name. If we don't, please ask for it.	<i>Would you mind letting me know your name?</i>
Once we know their first name, use it to address the customer	<i>Thanks [name] let me check for you.</i>

If you can answer the question within 30 seconds

Please just answer it as the next message you send. If you can't then read onto the next guideline.

Don't keep customers waiting more than 60 seconds

Situation	Text options (use one of these)
If you need some extra time to look up your FAQs to find out an answer for the customer you need to ask for more time. If you have to ask for more time more than once you can use a different version of the text on the right. However if it's more than 2 minutes we need to get back to them.	<i>Let me check for you</i> <i>I'm just looking into this for you</i> <i>I'm still here, just looking into this</i>
If it takes more than 2 minutes we need to get back to them. Send them the message on the right and then follow the escalation process.	<i>Hi [name] I will have to have some extra time to look into this for you.</i>

Breaking up paragraphs in canned responses

When canned responses have multiple paragraphs, send each paragraph in it's own message. You can use Control X to chop out the part you aren't sending and Control V to paste it and and keep doing that until you have used up the whole message. Or you can paste the response into notepad and copy it across one paragraph at a time.

If you get a question that you don't understand

If you get a question that has typos or you can't quite follow the question please say this.	<i>Sorry I'm not quite following. Can you please rephrase the question?</i>
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More than 3 questions you can't answer

If this client has asked more than 3 questions that you can't answer it might be that the questions are too tricky and they need to be escalated.	<i>Sorry your questions are a bit too advanced for me. I think it's best that I get someone to reply to you via email.</i>
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Use of Emoticons

- Use emoticons sparingly when the overall mood of the conversation is friendly.
- Don't use Emoticons when the customer is reporting a problem or seems unhappy.
- Stick with simple emoticons like :). Don't use anything that has the potential to be misinterpreted.

Closing out conversations

If you think the conversation is finished say this.	<i>Is there anything else I can help you with?</i>
If they say no say something like	<i>Thanks [name] I'll close the chat now. Have a nice day.</i>