

BOLDCHAT[®]

White Paper



Holiday Readiness Handbook 2012
Best Practices from
BoldChat Customers

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Highlights

- Thousands of customers, worldwide
- Reliable 99.99% uptime
- The industry's best value
- Fully deploys in days
- 24/7 support
- Proven installs across vertical markets

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Introduction

This whitepaper marks the third year in which we ask users of live chat about how the impending rush of the holiday shopping season affects their use of our technology. While many of the results presented here are, indeed focused on live chat software, there are some beyond the scope of this technology alone. For this reason, companies with or without live chat deployments may find the data useful.

Primary Research Methodology

The survey was fielded directly from our client application (both the PC version and the web-based client) through the use of the product's built-in communication mechanism, the Home Tab. The Home Tab is our "tips" repository, hosting hundreds of categorized posts aimed at making chat agents more proficient at using the BoldChat interface. From time-to-time we use the Home Tab to announce new product releases, planned maintenance, or to collect feedback through optional surveys.

This year's survey, like last year, was presented only to paying customers (ie: customers in our 10 day free trial were not offered the survey). The survey was completed by more than 450 respondents representing more than 300 unique companies. Eighty strict eCommerce firms took part in the research. The respondents were dispersed geographically as follows:

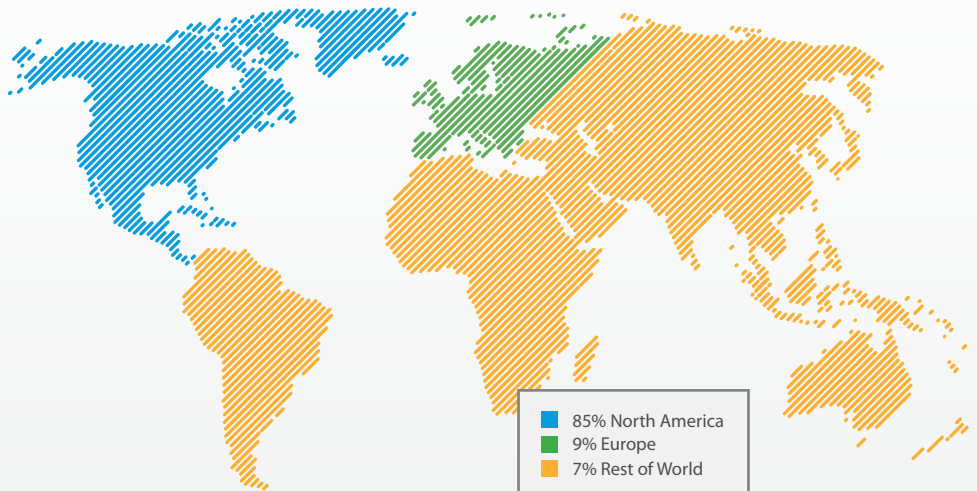


Figure 1: Geographic Dispersion of Respondents

Definitions

Throughout this report, the following terms are used repeatedly to describe different sub-groupings of respondents.

eCommerce	As the name implies, this grouping represents respondents that are employed by firms which directly transact business via their respective websites.
Large Customers	Respondents from firms which have 10 or more concurrent chat operators.
Supervisors/ Admins	Respondents who are either a supervisor of chat operators or the IT administrator of the BoldChat system.

Figure 2: Definitions Used in this Report

Findings

This year's report holds some similarities to previous year's data and some surprising and significant differences as well. The data informs us about the organization learning curve for live chat, the multi-channel reality for live chat agents, the likelihood of price-focused promotions for this holiday, and live chat optimizations that reach well beyond black Friday and cyber Monday.

#1: Live Chat Takes Years to Get Right

In several places throughout the data, it is shockingly clear that historic seasonality affecting live chat deployments has plummeted to the point of irrelevance. In past findings of this study, the holiday shopping season used to impact live chat operations in several meaningful ways, but in this third year of research with our customers, the results are dramatically different. We saw hints of this in last year's report amongst our largest customers, but now it's pronounced for the entire sample universe.

And it's not just that the season overall isn't important, because year-over-year this metric has remained steady, as you can see below with about half of companies saying the season is important to their business.

Importance of Holiday Shopping Season

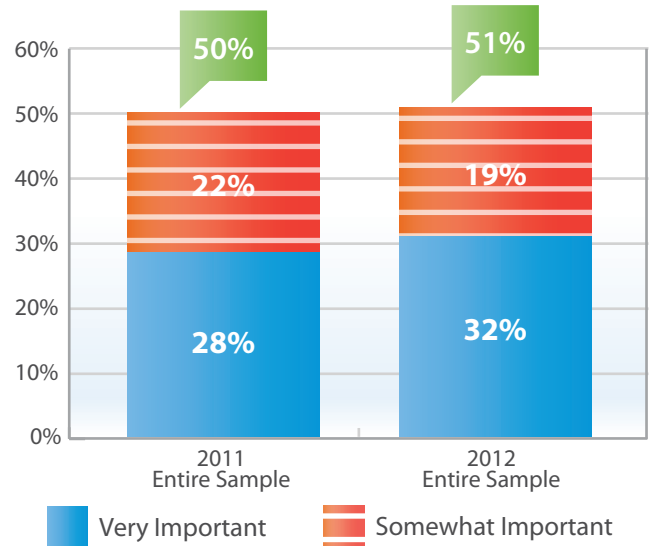


Figure 3: How important is the holiday season to your business?

And it's not that companies don't actively prepare for the season – because, again as you can see below, they do, and even more so this year.

Holiday Season Preparations

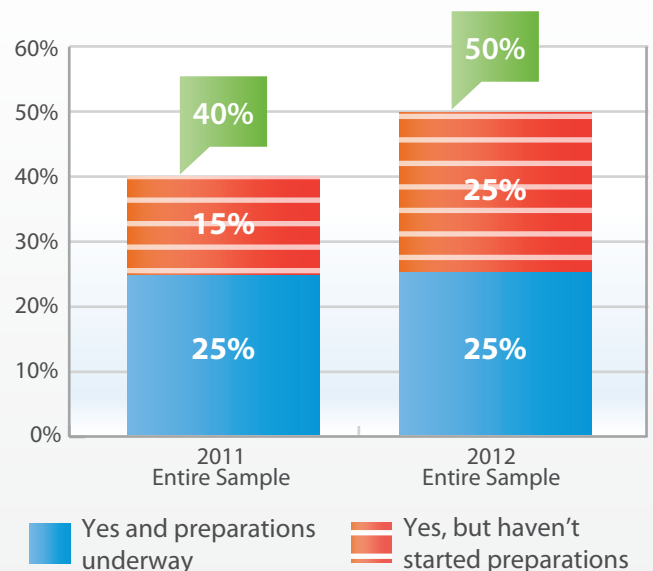


Figure 4: Does your business actively prepare for the holiday season?

Despite these results, the impact the season has on live chat, specifically, is down dramatically:

% Agreeing with Statements About Live Chat During the Holiday Season

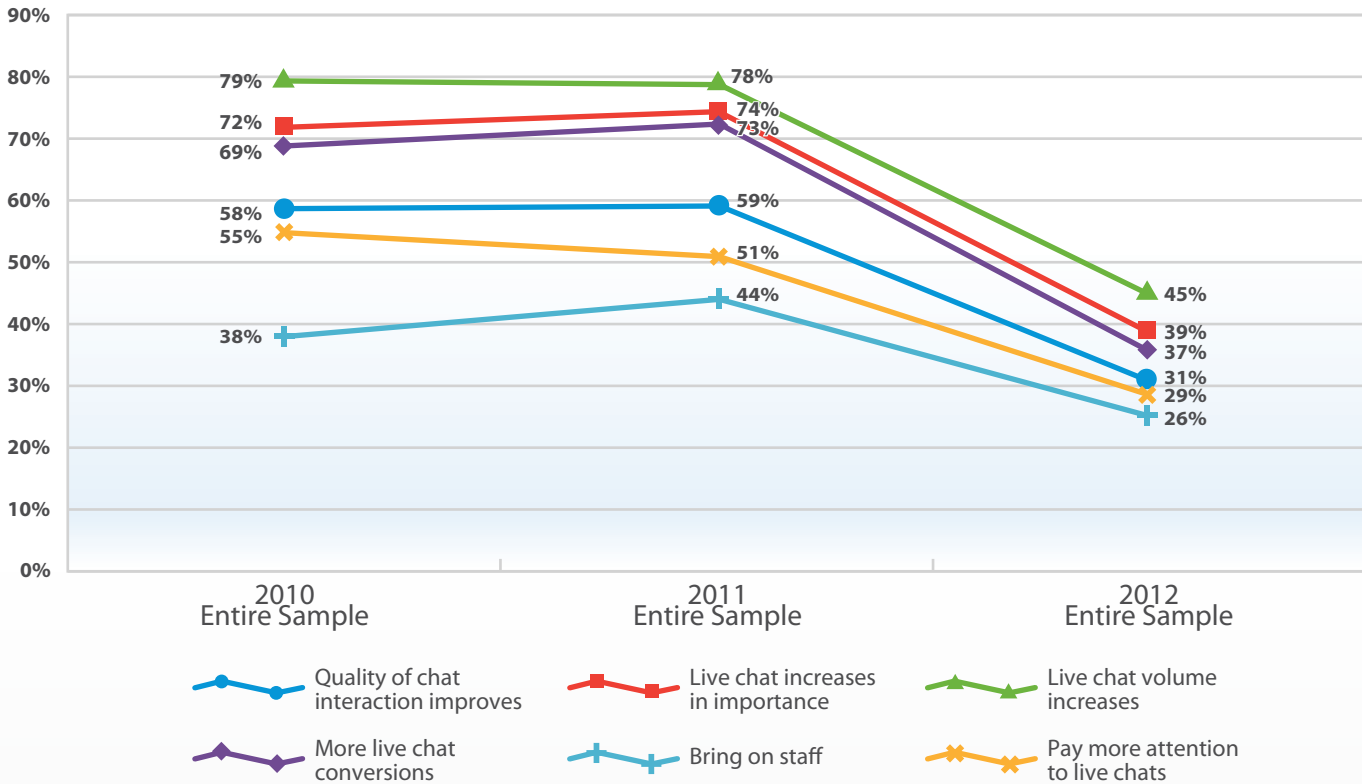


Figure 5: % Agreeing with Statements About Live Chat During the Holiday Season

While these are just the results from the entire sample, each sub-grouping looks the same, showing a sharp drop off in the holiday season's impact on the live chat operation.

Last year, when we noticed an indicative shift in this direction from our larger implementations, we postulated then, and now, the same thing – that live chat is *always* important, not just for a few months a year.

Because this survey was conducted with basically the same sample universe (our customer base year over year) it also could be theorized that optimizing a live chat deployment to the point where significant changes no longer need to be made in preparation for a holiday rush takes at least two years. This isn't to say that respondents don't tend to their live chat operation because, as we'll see later, they do.

#2: Live Chat Agents Do More Than Just Live Chat

We're consistently asked if organizations should have dedicated live chat agents or not. In a perfect world, of course a dedicated live chat representative would be most effective, but the reality is that the world isn't perfect. In this year's research we asked respondents what other communication channels are used during the holiday season to assist with sales. Not surprisingly, email and phone had a strong showing across the board. Social was very popular and texting made an appearance which we believe will only increase over time.

Not only did we discover that firms engage in multi-channel communication, but we learned that chat agents, overwhelming, are the ones tasked with fielding inquiries across channels.

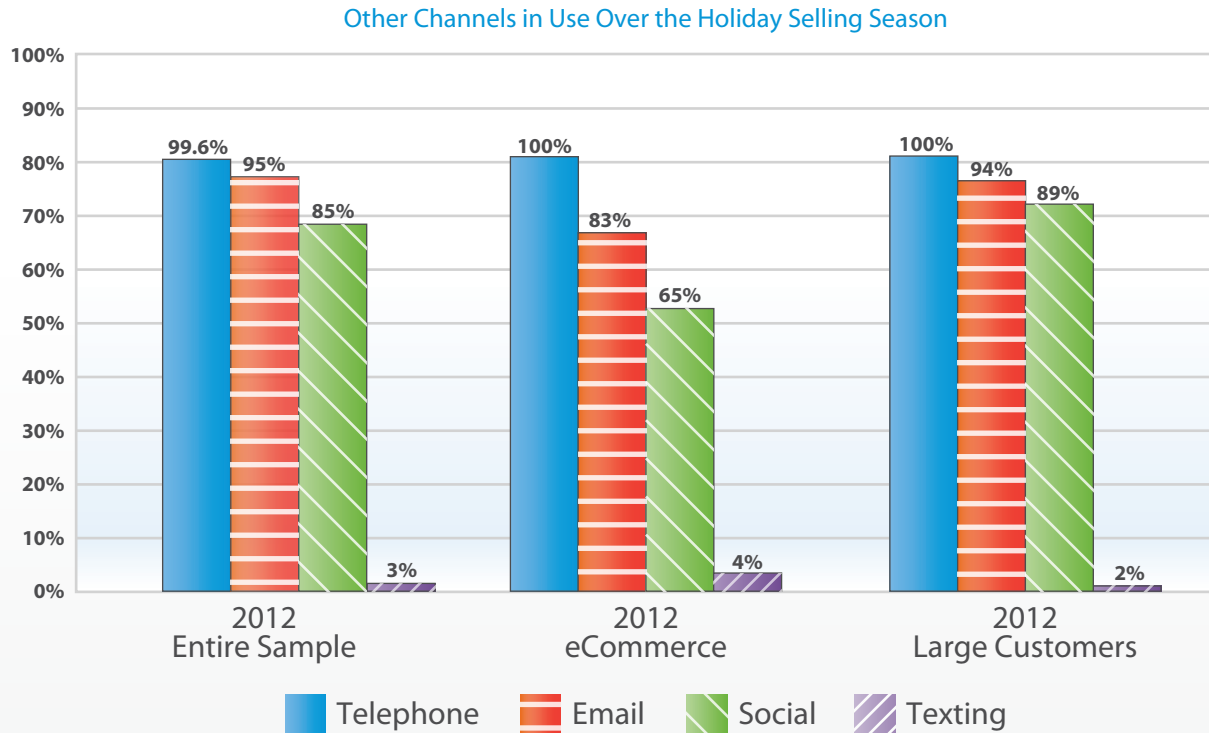


Figure 6: Holiday Selling is Multi-channel

Do Chat Agents Interact on Multiple Channels at The Same Time?

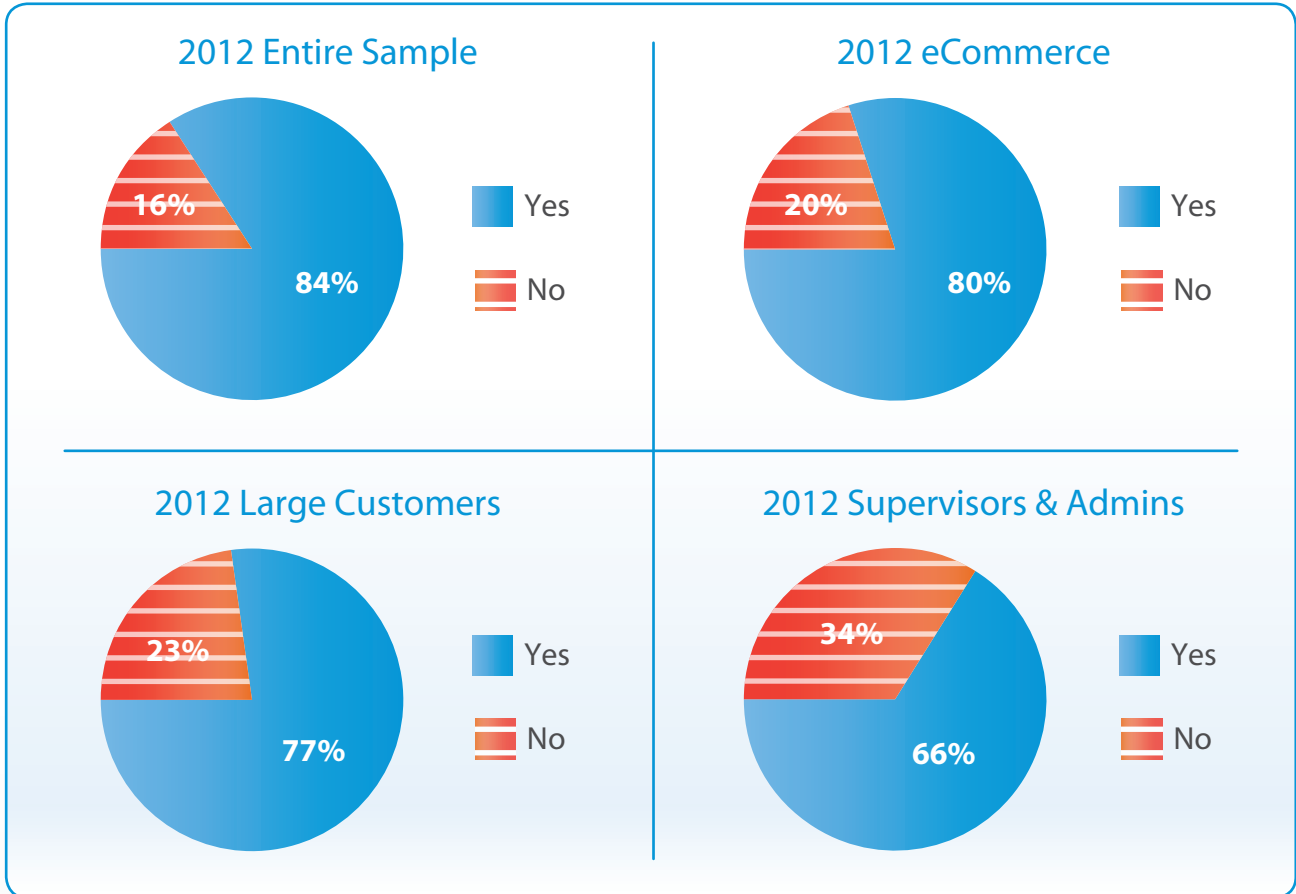


Figure 7: % Chat Agents Multi-tasking

Our earlier, and dichotomous, statement about the “perfect world” and “reality” can be seen clearly here. For three of the sub-groupings, more than 3/4 of responders indicated positively that live chat agents multi-task across channels while only 2/3 of the Supervisors and Administrators said that. Knowing that dedicated agents can often be relatively more productive, Supervisors are likely caught in the middle between wanting to dedicate agents, and the reality that customers communicate in myriad ways.

#3: Online Consumers Likely to Find Low-Price Deals This Season

Each year we’ve asked respondents to indicate the top promotions/specials they intend to launch for the holiday season. The results, year-over-year are very similar, with Discounts, Specific Product Promotions, Internet-only Specials, and Shipping Offers rounding out the top 4. “Lowest-price guarantees” made interesting moves this year for both eCommerce respondents and for respondents from larger live chat implementations.

Top Promotions

2011 Entire Sample	2011 eCommerce	2011 Large Customers
Discounts Specific Product Promotions Internet-Only Specials Shipping Offers	Discounts Specific Product Promotions Internet-Only Specials Shipping Offers	Discounts Specific Product Promotions Internet-Only Specials Lowest Price Guarantee
2012 Entire Sample	2012 eCommerce	2012 Large Customers
Discounts Specific Product Promotions Internet-Only Specials Shipping Offers	Discounts Specific Product Promotions Internet-Only Specials Lowest Price Guarantee	Discounts Specific Product Promotions Lowest Price Guarantee Shipping Offers

Figure 8: Top Promotions This Holiday Season

Consumers will likely find these promotions through visual indicators on-site, dedicated landing pages, or even by engaging with a live chat agent.

Top Website Changes

2012 Entire Sample	2012 eCommerce	2012 Large Customers
Moderate Design Changes Landing Pages Site Navigation Optimization of Live Chat Site Search	Landing Pages Site Navigation Moderate Design Changes Optimization of Live Chat On Site SEO	Moderate Design Changes Optimization of Live Chat Site Navigation Site Search Landing Pages

Figure 9: Top 5 Website Changes in Preparation for Holiday Shopping Season

#4: Live Chat Optimizations Good Year-Round

We asked respondents to specifically indicate the top five things they would do to their live chat implementation in preparation for the holiday shopping season. The results would most certainly have a positive impact for visitors shopping onsite.

1. Evaluate canned messaging
2. Empower agents to offer incentives
3. Implement an omnipresent floating chat button
4. Implement proactive chat, if not implemented already
5. Implement new proactive invitations/rules

Interestingly, these 5 things would be good to implement at any time of year. Indeed, these are exactly the kinds of things that we simply consider live chat best practices, and the things that drive many of our professional services engagements. It's no accident that for all of these things, excepting the floating chat button, the BoldChat system (and most leading live chat products) has deep and robust reporting built around them. Optimization only happens with data and testing.

Conclusions

Users of live chat, in years past, indicated that the holiday shopping season greatly impacted their deployment. It impacted the quality of their chat engagements, the number of their chat engagements, how they staffed, and more. This year, in dramatic fashion, we learned that this is no longer the case. We know from working directly with customers that these metrics - all quality & volume driven - are completely controllable, and it seems our customers have achieved a level of optimization that makes live chat a part of their operation, like any other. Of course, this finding leads one to ask an entirely different set of questions like:

- How long does it really take for a company to achieve such live chat expertise that a holiday shopping rush can be planned for in stride?
- What can be done to accelerate the time it takes?
- Does the time it takes differ by industry? Company size? Etc.
- Does the fact that chat agents are increasingly being asked to manage communications across multiple channels impact the time it takes, or even render it irrelevant?

These are all questions for another day, and perhaps another season.

BOLDCHAT

BoldChat is a market-leading live chat solution enabling businesses to quickly and effectively engage visitors on their websites. BoldChat is offered in different editions and includes other integrated communications technologies like click-to-call, email management, SMS management, and co-browsing. Organizations of all sizes - from small proprietorships to large ecommerce enterprises - can drive more conversions and higher customer satisfaction by using BoldChat.

For more information:

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