Counselor Training: June 10th, 2021
Training Agenda

Intro & Application Basics (10 min):
- contact info + support
- how you log in
- agent status
- notifications
- chat limits

Fishing Guidelines (20 min):
- Chat limits
- Traffic page
- Traffic fields to check
- #starter canned response

Chats (20 min):
- explanation
- chat routing
- chat transfer + use cases
- archives
- canned responses
- tag usage
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Vendor:
LiveChat Inc
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24/7 Support!

connected. Automate!

Get the answer. Scale your support.
• Through **website**:  
  • [https://my.livechatinc.com/](https://my.livechatinc.com/)

• Through **Desktop** apps:  
  • Windows  
  • macOS  
  • Linux

• **Mobile**: but not intended for daily use
Mobile application

Available on:
• iOS
• Android

Great for taking chats away from the desk, but NOT for spending the whole work day from the phone.
Agent status

**Don’t accept** chats status

- Kuba
  - j.swierczak@livechatinc.com
  - Accept chats
  - News & alerts
  - Notification preferences
  - Log out

**Accept** chats status

- Kuba
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Notifications

Never miss a chat

Sound and visual notifications from LiveChat apps ensure that no chat or new message goes unnoticed. You can choose which notifications you want to receive.
CalHOPE Chat limit

When Fishing on the Traffic page, we need to keep an eye on the # of Chats we have at a time.

*Total Active Chat Limit is 2. No Exceptions!!!
Turn **Accept chats** off and on at the beginning and end of your shift.

Initiate chats from the **Desktop**; **Mobile** is for taking chats away from the desk only.

Always remember to **turn on your notifications**

Use **Don’t Accept chats** status if you are about to leave and want to finish your chats.

**Respect the Fishing guidelines:** No more than 2 chats at a time.
FISHING GUIDELINES
Fishing Guidelines

• 2 chats limit

• Wait til visitor at least 1 min on page

• When fishing, counselors must start chat using the #starter Canned Response:

We are here to support you, including protecting your personal information. There won’t be a need for your full or last name, address, or phone number.

Please let me know if you’d prefer to chat with someone in Spanish. Por favor avíseme si prefiere hablar con alguien en español. Puedes responder con "español por favor".

How can I support you today?
## Required Traffic Filter Fields:

<table>
<thead>
<tr>
<th>NAME</th>
<th>EMAIL</th>
<th>ACTIONS</th>
<th>ACTIVITY</th>
<th>CHATTING WITH</th>
<th>LAST SEEN</th>
<th>NO. OF VISITS</th>
<th>LAST PAGE</th>
<th>TIME ON ALL PAGES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marko Test</td>
<td><a href="mailto:marko@marko.com">marko@marko.com</a></td>
<td>Go to chat</td>
<td>Supervising</td>
<td>Marko 2</td>
<td>today</td>
<td>10</td>
<td>Chat now</td>
<td>about 1 hour</td>
</tr>
<tr>
<td>150.red-83-50-23...</td>
<td>-</td>
<td>Start chat</td>
<td>Browsing</td>
<td>-</td>
<td>today</td>
<td>1</td>
<td>Chat now</td>
<td>19 minutes</td>
</tr>
</tbody>
</table>
Canned responses

Save time on repeated questions

Quickly save time on common questions. Reuse them in conversations with just a few keystrokes.

New canned responses: only if they apply to **ALL** counselors

Canned responses begin with `#countyname`
Customer details

All customer information in one place

LiveChat gives you all the necessary data you need to close a sale. Use it to your advantage to get more personal with a customer!
Keep track of every conversation

Adding tags to your chats gives them context. This helps with reporting, and makes it easier to check archived chats.

Always Tag at the END of a chat. You will be reminded to do so.
CalHOPE Tags

- Anxiousness
- Sadness
- Loneliness
- Health concerns
- Financial concerns
- Housing and Homelessness

For new Tags: Propose to Mgmt
Please do **NOT** add them yourselves.
Help your teammates

Agents use chat transfers to hand over their chats to other live chat agents.
Transfer

Ollie Johnston

Pre-chat survey
Name: Ollie Johnston
E-mail: ollie@mail.com

Jane
Hello Ollie Johnston!
Transfer to...
Create ticket...
Ban this visitor
Stop this chat
Transfer Tip!

Let the customer know that they are about to be transferred with a personal message. It should contain the reason behind the transfer and the name of the agent who will take over the chat.
Search through old conversations

All chats are stored and can be accessed later on. Use filters to quickly find conversations that include a certain phrase, were handled by a particular agent, or happened during a specific time.
Best Practices

Use **Tags** to help categorize and organize all your customer communication.

Use **Canned responses** to speed up your conversation with customers.

Use **Archives** to look for patterns and repeating cases.

Always give a heads up to customers being **Transferred**.