

# Practical guide to **WEB MESSAGING**

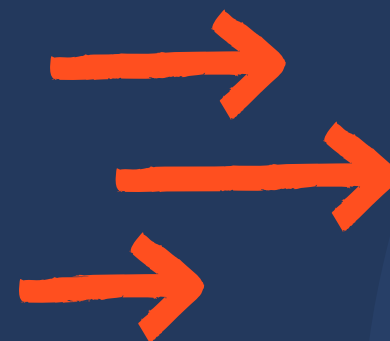


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Web messaging builds your relationship with customers. Engagement, which was once transactional and offered limited ways to interact with you, has evolved into persistent conversations that have the flexibility to pause and resume at a pace the customer chooses.

There's always a process when you interact with customers and there are specific ways to make that experience better. This guide shows you how.



# Decide if it's the right time for web messaging

If it feels like every business is jumping on the digital train, you're right. The speed of digital adoption is unprecedented; it's dissolving the traditional barriers between service and sales. But determining the right mix of channels and knowing how to set them up to meet your business goals requires some homework.

When choosing a digital channel, there are good reasons to start with web messaging, including easy deployment and customization with limited IT involvement. It also gives your customers the control they want and expect – with 24/7 access to your business. It provides the same experience as other public messaging platforms, but with more privacy because conversations are with your business only, not with an intermediary like Facebook.

Due to COVID-19, **63% OF CUSTOMERS** were motivated to try or use digital apps and tools. And **75% WILL CONTINUE** to prefer digital apps post-pandemic.

The Northridge Group 2020 survey on business and customer service trends

# The differences between **WEB MESSAGING AND WEB CHAT**



## **Web chat**

Web chat is mainly used on a desktop for immediate responses to sales questions. It's more like engagement on the phone — with wait times and queuing. Each session is independent.

## **Web messaging**

Web messaging has many advantages over web chat. You can use it throughout the full customer journey on multiple devices. It uses asynchronous communication, meaning that customers can engage with your brand at any time. And they never have to repeat themselves. Whenever the conversation is picked up, the history remains for the customer — and for your agents.

## Establish a strategy that serves long-term goals

Look at web messaging from the customers' perspective and create a strategy for how they'll access your business. For starters, they want fast resolutions to their queries and a vendor who values their business. They don't want to deal with just another step in the engagement process.

As consumers increasingly engage with businesses on more than one channel, they also expect the same positive experience on all of them. Once you're rolling with web messaging, omnichannel plays a bigger role as it connects all your digital channels when you add them. It also unifies the customer experience across all of them.

Web messaging is also a new opportunity to generate revenue. It reveals the hidden needs of customers who come to your website and why they use chat. You can use that data to inform marketing campaigns to maximize lead acquisition and lead nurturing.



## Take flight with personalized experiences

Digital is a new frontier in maximizing engagement opportunities with a 24/7 customer care experience. Offering a personalized experience shows customers empathy; those feelings of empathy build trust and drive loyalty.

Having real-time personalized data through rich messaging, conversational chatbots and human empathy requires true omnichannel engagement. You need that to understand and influence the experience with the security and compliance that consumers expect. To take advantage of everything digital offers, your platform choice matters.

Whether you've already implemented **WEB MESSAGING** and want to get more from it, or you're trying to figure out where to begin, this guide can help. We'll take you through our **WALK, RUN AND FLY** framework to identify how to get going — and where you can take web messaging in the long run.

Phase 1

# WALK: MASTER THE BASICS



## WALK

# Master the basics

Think of “Walk” as a step of discovery that gives customers and prospects a new way to connect with you. Over time, you’ll learn more about your customers and be able to deliver a more empathetic experience.

## USE CASE

Joe remembered driving past a house that was for sale in a neighborhood he liked. That night, he sent the real estate company a web message asking whether the house was still available. The next morning, he learned that it was and that the price was recently reduced. But Joe wasn’t quite ready to go any further.





## Design the conversation

Decide what “good” looks like to you and you’ll have a baseline for a conversation over the web. You won’t know in advance what the discussions will be, so using options like list pickers can help you design the starting conversation and improve upon it as you go. Without list pickers, you won’t know what customers need. All of your agents would respond to that query immediately.



Enable web messaging by deploying the messenger on your site. Look for visitor exit points and high bounce rates, which are available from Google Analytics, to refine your engagement strategy.



Customize the messenger’s behavior and branding with an intuitive admin application that lets you publish updates in a few clicks, with limited IT involvement.



Set up your most widely used canned responses for agents, such as a resolution time response and a personalized welcome message. FAQs are a good place to start.



Connect to your CRM system as early as possible so you have more data when you’re ready for the next step.

## Enable your employees to continually improve

Deploy web messaging with a bias toward agents. They'll be key to having customers successfully adopt it. To start, prep agents to succeed with training on how to use the tool. They might be familiar with its use for personal reasons, but don't know best practices for using it as representatives of your business. If they're confident in offering support via messaging, it'll improve the customer experience.

Set realistic expectations. For example, agents will handle more interactions, not fewer. These queries might not be familiar ones. Yet, customers will expect a faster response – if it's during business hours – and resolution in one interaction.

Give agents easy access to canned responses for common questions so they have answers that are quick and accurate. Concurrent message management is a new skill they'll need to learn. With voice, they might handle one call at a time. But with messaging, it can be multiple conversations – all with different issues.



Evaluate how staffing needs will change and shift resources, as needed.



Encourage agents to personalize canned messages, when appropriate, for more authentic conversations.



Give employees visibility into their performances to drive ongoing self-improvement.



Depending on your call volumes, decide if you need a dedicated messaging agent or whether blended channel agents work best.

## Ensure superior, quality interactions

You're giving your customers a new way to engage. Make sure it's a positive experience. Recording interactions and using that insight for quality assurance processes and employee training is one way to do this.

You can also review transcriptions for speech analytics to gain a better understanding of how agents and customers interact. Web messaging facilitates granular analysis as a text-based channel. And with speech analytics (voice-to-text), you can analyze voice with the same granularity.



### TIP

Create distinct quality forms for voice and messaging interactions.

# Measure your results

In this phase, you're trying to improve efficiency, reduce costs and maximize agent productivity. Think about which indicators serve your goals and what's possible with web messaging.

Your SLAs will be different with web messaging than with voice, as will the questions your agents handle. So you'll need to establish new benchmarks.

## **SERVICE KPIs**

- Number of service inquiries resolved through web messaging
- Reduced wait times on all your channels, including web and voice – expect a 5% to 10% reduction in wait times with digital deflection

## **SALES KPIs**

- Number of questions answered that resulted in a purchase
- Shortened time-to-purchase on website by answering questions through web messaging

## **MARKETING KPIs**

- Reduced bounce rates for identified web pages

## **EMPLOYEE KPIs**

- Number of engagements an agent handles during a specific period – businesses often see a jump from six to seven engagements per hour to more than 20
- Agency occupancy, or the total time an agent is delivering customer service – expect natural uplifts of 3% to 5%

## Checklist

### Before you run:

- Identify your top challenges. For example, do internal processes support your needs?
- Make sure backend data is in place to authenticate those who message you.
- Evaluate your performance against the web messaging KPIs you defined. Determine what you're doing well and where you need to adjust.
- Calculate your cost per interaction and other established KPIs. Use this data to build a business case for additions to your digital portfolio.
- Check in with employees who use web messaging to determine what's working well for them and where they need more support.
- Look for trends. Pinpoint which use cases make the most successful chats. Look for scenarios that are better suited to a different channel.

At the end of the **WALK PHASE**, you'll engage with customers and prospects via web messaging. Your employees will be equipped to handle these types of interactions — and your metrics will show improvements.

Phase 2

# RUN: TAILOR BETTER JOURNEYS



**Run**

## Tailor better journeys

During the Walk phase, you were trying to hit your KPIs. You defined them and built a plan. Now that you're ready for the Run phase, it's time to add more channels that are popular with your customer base.

Blending web messaging with other channels gives agents real-time access to customer engagement history and preferences — and customers can start more personalized journeys.

### USE CASE

Joe can't stop thinking about that house. He sends a follow-up message asking for more information, including photos and details about the lot. The agent who initially helped him replies with PDFs of the current property and similar properties. Now the agent has a good idea of what Joe wants. Joe agrees to receive notifications of new listings before they come on the market.



## Connect all your digital conversations

Blending your customer engagement channels lets you transition conversations across them. If you're chatting with a customer on web messaging, that conversation can continue on other channels, including voice, where many tough calls escalate. If you haven't done so already, connect web messaging to your CRM system. This is an especially powerful addition. Agents can ask for an email address (or other identifier) and bring up the customer's record while they're all engaged in the conversation.

As you collect more data from these conversations, think about what's important to you when it comes to messaging. The questions are certainly different than voice. Service levels are also different, depending on what customers expect from each channel.



### TIP

Integrate web messaging with your existing authentication provider to secure conversations for authenticated users.

## Introduce bots and give them jobs

Bots are very effective at assessing and answering repetitive, routine questions – and they can do this faster than humans. Plus, many customers prefer not to engage with a human at all for simple questions. Let bots handle that first contact with customers via your messaging app and only engage humans when it's necessary.

It's important to remember that 100% containment is never a good thing unless you know why customers don't need assistance from agents. For example, you might have many inquiries focused on changing addresses rather than using the website to purchase products. This is valuable data for planning website improvements and deciding which next steps to promote in future interactions.

### **KEEP IN MIND:**

Customers and prospects will throw a lot of questions at your bot. And, occasionally, it'll fail. But that's not a bad thing. You'll get questions up front that offer insights that build better conversations.

# SAVE TIME AND MONEY



## with self-learning bots

It's easy and secure to implement bots that operate using predefined rules. But that approach means that bots can't learn in real time. If a customer asks a bot a question in a way that isn't part of a predefined rule, the bot must hand off to a human. They can't learn how language varies, which is required for them to recognize intent and personalize conversations.

Artificial intelligence (AI) bots are self-learning and save a lot of time and money in the long run. Here are some common use cases for AI bots that save agent time:



### **Business processes:**

Update address, password reset, preference management, schedule callback



### **Routing to another channel:**

Agent qualification; email, SMS, voice; routing to another bot



### **Processing transactions:**

Bill payments, product or service orders, guided technical support, satisfaction survey



### **Real-time queries:**

Account balances, store hours, location

## Tackle more complex inquiries

With integration to an existing CRM system, both bots and advanced canned responses can retrieve data from the system, such as status updates or balance inquiries. Web messaging also creates more opportunities to engage when you share rich media – images, PDFs and videos – and you capture that context. Share how-to articles and even emojis to establish an empathetic and familiar conversation.

Co-browse often solves problems faster than a verbal explanation. Use it to show customers how to complete forms, where to make payments and more. When messaging conversations are part of a unified customer profile, you can follow the customer wherever they log into your brand. And you can deliver the personalized service they expect.

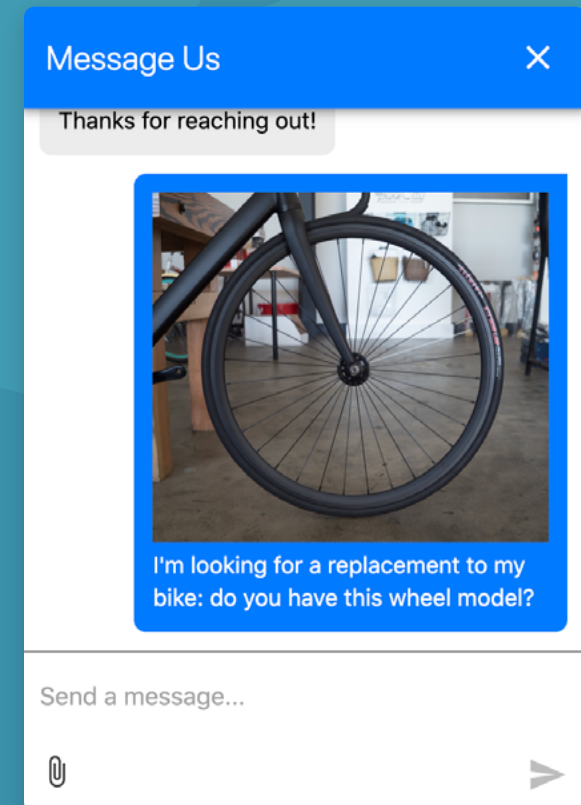


Image attachments make conversations easier for users and agents. This includes in-app preview, file validation and animated GIFs.



## Evaluate improvements in employee engagement

It can be tough to manage staffing properly when you first introduce web messaging. But you'll soon know if you have the right amount of staffing. Then you can review scheduling and forecasting. If you don't have a bot yet, enable dynamic in-queue messaging to prepare for high-volume times. This will change based on the customer's time in queue. You can also offer customers the option to change a queued message to an email or callback.

Simple gamification tools can encourage your employees to adopt new channels and ways of working. A little friendly competition can go a long way for employee engagement, such as "most positive feedback from customers," "most chats handled," or even "fastest average accepted time." And there are numerous ways to add depth and gain insights from all that employee engagement data you receive.



### TIP

Send a customer satisfaction survey at the end of messaging conversations and include some open-ended questions. These answers can add depth to your quantitative data and provide context.



# Measure your results

In the Run phase, KPIs focus on improving the experience for both the customer and the employee. Consider adding to the KPIs you identified in the Walk phase.

## **SERVICE KPIs**

- Net Promoter Score (NPS) is less about handling engagements and more about giving customers a seamless experience that doesn't require switching channels to resolve an issue
- FCR, mean time to resolution, speed to issue resolution and level of effort needed for issue resolution

## **SALES KPIs**

- Reduced abandon rates and an increase in sales

## **MARKETING KPIs**

- Increase in lead generation and conversions

## **EMPLOYEE KPIs**

- Increased employee engagement and effectiveness
- Number of positive interactions

## Checklist

### Before you fly:

- Review and adjust your scheduling and forecasting as inquiries drop on other channels, such as voice.
- Enable customers to attach images in the app to enrich conversations.
- Use AI bots to qualify prospects or capture customer details and intents. Then agents can re-engage, if needed, as they become available.
- Streamline conversations using quick replies and other rich media.

At the end of the **RUN PHASE**, agents grow more adept at moving conversations between web messaging and other digital channels. They'll be aware of their own productivity and understand more of your customers' intent. And they'll rely on bots to do more front-end information gathering.

Phase 3

# FLY: SERVE CUSTOMERS WITH EMPATHY

FLY

## Serve customers with empathy

In the Fly phase, you're focused on what makes you more competitive. Today, that's all about making sure your customers feel heard, remembered and understood — the foundations of delivering experiences rooted in empathy.

### USE CASE

Joe is finally ready to dive into home ownership. While he qualifies for several homes, he's not comfortable at the upper end of his budget. Fortunately, the customer support agent has data on a home — and the seller is willing to negotiate. Would Joe like to set up a tour of the home? And does he have a buyer's agent or would he like recommendations? Within seconds, Joe receives a list of the company's highly rated agents for his area. And triggers are in place for this support agent to follow up.



## Predict the right course of action

Now that you know who your customers and prospects are and where they're navigating, AI transforms that understanding into predictions about what to do next. This includes everything from a pop-up offer to an instant connection with a human agent. When you engage with customers at the right time, on the right channel, with the right information, empathy becomes the center of every conversation.

Your business is ready to react in real time to customer-related events from your digital assets and back-end systems. Then you can engage via messaging, email, SMS, digital content offers, callbacks and more. This is possible using orchestration workflows around critical events or sets of actions. These workflows incorporate AI elements, including the probability of a customer achieving a desired business outcome.



### TIP

The conversation begins long before the message is sent — when customers browse your website. It's an opening for engagement because their behaviors tell you what outcome they want to achieve. When you advance into the Fly phase, AI captures that information in real time and provides options on how to engage next.

## Become a data-driven organization

To be ready to “Fly,” you’ll need to monitor customer activities on your website and through engagements on all your digital channels.

As part of that, collect and collate customer profiles and preference data across those channels, including website, web messaging, bots, messaging apps and voice.

When you’re engaging with someone in person, you can read body language and take note of small nuances as well as positive or negative reactions. In the digital world, applying AI to discover patterns within data gives you that insight into customers. But first, it must be collated into a useable form.

### **OFFLOAD YOUR DATA FOR TRANSFORMATION**

Once you recognize different formats of the same data from all your customer interactions and transform it, you’ll have insights that allow you to gain more from it. Use the output across products to drive personalized engagements.

### **UNDERSTAND YOUR CUSTOMER'S OBJECTIVE**

Answer the real question asked – no matter how a customer asks it. Natural Language Processing (NLP) recognizes intent and can provide an answer even when the sentence structure or language varies.

### **VISUALIZE YOUR DATA FOR A CLEARER PICTURE**

Displaying your information visually helps admins consume and comprehend massive amounts of data. Identity resolution provides insights into individual customer journeys.



## Scale your data-backed insights with AI

From the data you've collected, you can map successful customer journeys for several use cases – sales, marketing and service. Then analyze the data to identify common challenge areas that take customers off the successful journey track. From there, you can predict the ideal next step for customers to take and return them to a successful journey.



### Identify patterns

AI forms patterns more efficiently than a human. Correlation mathematics projects behavior trends and changes, surfacing leading and lagging indicators. By spotting early indicators, you can intervene and reduce impact.



### Derive sentiment from interactions

Include speech- and text-analysis AI because it goes deeper than NLP. It detects a customer's sentiment by analyzing their word choice, energy and tone. This helps employees see and understand the customer so they can respond appropriately.



### Find the best answers for questions

Use AI to compare and rate similar responses to frequently asked questions. Q&A disambiguation AI answers questions with canned responses and learns which answer is most effective.



### Personalize next steps

Give customers smart recommendations for next steps or products they want. Match even new users to existing customer behaviors with pattern matching for the next-best action.

## Trigger meaningful engagements

Now you're in control of when and how to engage. With the power of AI, your administrators have visibility into successful and unsuccessful customer journeys. And they can make recommendations on how employees can improve those journeys in the future.

Your employees are ready to act at the right time — with the right information. Alert employees of opportunities to engage. Share a customer's entire engagement history as well as the journey happening at that time on the website. Recommend the next-best action for customers to take and enable your employees to engage customers through web messaging.

### **TAILOR WEB EXPERIENCES TO THE BUYER**

Shape a buyer's experience on your website based on the likelihood to accomplish their goal. Predictive web engagement AI determines when a user needs assistance and whether to initiate a messaging conversation to close the deal.

### **MATCH CUSTOMERS AND EMPLOYEES**

Connect customers with the right agent or information every time. Predictive routing AI considers customer preferences and matches each one with the agent who's most likely to deliver the best customer experience, grow revenue and improve KPIs.

### **SUPPORT YOUR EMPLOYEES USING AI**

Give employees the knowledge and resources they need to handle customer interactions with confidence. AI-powered agent assistance monitors conversations and gives your employees real-time recommendations and next-best actions.

## Review and improve

As you listen to your customers, you're continually learning about every interaction from data that's clean and accessible. Use this data to inform improvements in the customer journey, such as finding places customers get stuck in the journey and suggesting ways to keep them on track.

You'll have some points of failure along the way and some surprising events. With AI, you can learn from them and find emerging trends as your model evolves. For example, interaction analytics lets you categorize conversations and adjust your design. AI also can locate repeating, high-cost processes and use robotic process automation to increase efficiency.

### **TAKE THE GUESSWORK OUT OF SCHEDULING**

Automate accurate forecasts and schedules in less time. AI-powered forecasting and scheduling optimizes your workforce planning, lowers overtime, and frees managers for training and support.

## Measure success

In the Fly phase, you'll have measurement processes that allow you to continue improving KPIs you established during the Walk and Run phases. And you can understand the customer journey at a much more complex level, enabling you to supercharge your KPIs.

This creates better experiences that feed customer loyalty and higher customer lifetime value. And with a fully customer- and employee-centric approach, you're tying your success to business outcomes.

When you fully integrate web messaging with AI services, you can proactively serve customers based on monitoring their journeys and attributes to engage. And this happens in the crucial moments — when it matters most.

**“Genesys Predictive Engagement is enabling us to capture significantly more window shoppers on our website. *CONVERSION RATES ROSE* by 14% in the first two weeks and by 49% at the six-week stage. And we've only really scratched the surface of what the tool can do.”**

**Getinet Tadesse**

CIO, Ethiopian Airlines

## Checklist

### To fly higher:

- Continue drawing from past engagements to predict next-best steps with highest confidence.
- Revise rules and criteria, as needed, for personalized engagement based on best likely outcome.
- Reduce the number of points of failure in the customer journey and business operations as you develop your AI capabilities.
- As your business strategy evolves, create new workflows around critical events or sets of actions.
- Research, calculate and plan for future resource needs to meet efficiency goals.
- Review how you prioritize actions among desired business outcomes.

As you start to **FLY**, you'll find more opportunities for growth and ways to show your customers you care about their **EXPERIENCES**. Many organizations partner with a third-party company like Genesys to fully implement the Fly phase.

# Conclusion

Put your prospects and customers in control and let them engage with your business whenever it's convenient for them. You'll strengthen connections by delivering empathetic interactions – and that creates loyalty.

Web messaging can be relatively easy to implement – and highly effective – once you outline your goals. Using the Genesys Cloud™ platform, you can lay the foundation to build out your ecosystem over time.

Genesys Professional Services can guide you through part or all of the process. We've pioneered Experience as a Service<sup>SM</sup> to help organizations of all sizes provide true personalization at scale, interact with empathy, and foster customer trust and loyalty – all through the power of cloud.

## When you're ready to fly, Genesys can help you:

- Get your data AI-ready.
- Automate detection of the most likely customer goal and the probability to achieve it.
- Actively learn from customer engagements and identify ways to improve.



## **ABOUT GENESYS**

Every year, Genesys® delivers more than 70 billion remarkable customer experiences for organizations in over 100 countries. Through the power of the cloud and AI, our technology connects every customer moment across marketing, sales and service on any channel, while also improving employee experiences. Genesys pioneered Experience as a Service™ so organizations of any size can provide true personalization at scale, interact with empathy, and foster customer trust and loyalty. This is enabled by Genesys Cloud™, an all-in-one solution and the world's leading public contact center platform, designed for rapid innovation, scalability and flexibility.

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