



# The ultimate guide to live chat.

How to win hearts, minds & business.





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# Meet your new customers.

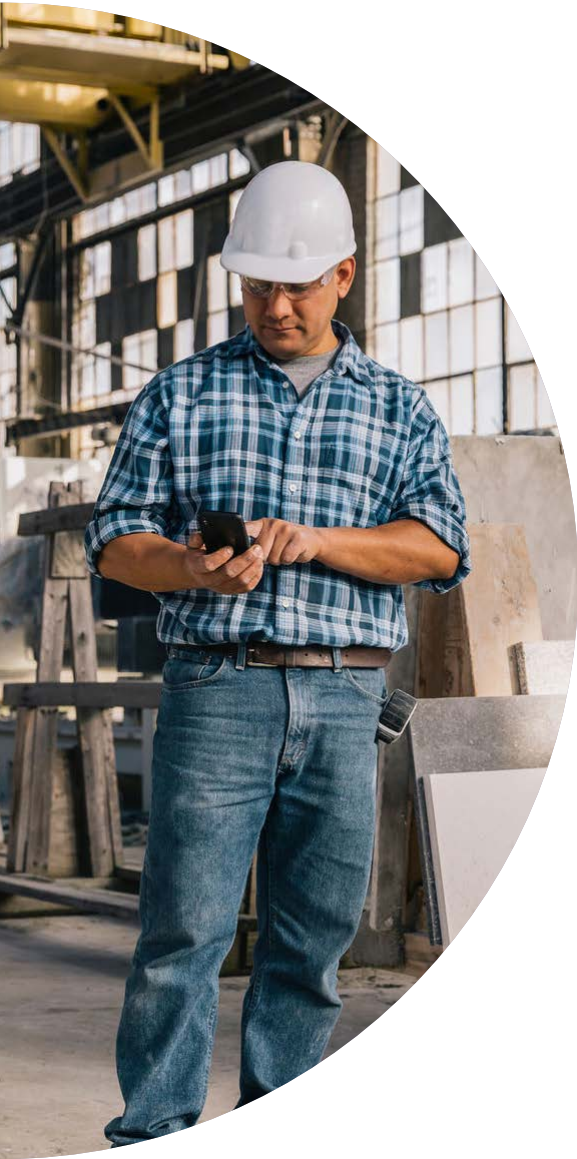
Right now, customers are browsing your website. Are you equipped to give them the experience they demand? Eighty percent of customers say the experience a company provides is as valuable as its products and services.<sup>1</sup>

Read on to learn how creating an exceptional experience for your online site visitors can help you win hearts, minds, and new business. Live chat can be an essential part of your customer engagement strategy—the way you connect with, market your services, and sell your solutions to customers. Every contact you make with a customer is considered a “touchpoint,” and live chat is no different. Along with phone calls, emails, social media interactions, and in-person visits, as a touchpoint, live chat can have a dramatic impact on your company’s reputation.

If you’re like most small business owners, you probably already have an online presence. It’s probably no surprise to you that the vast majority of customer purchasing decisions, especially those for service-oriented businesses, now begin with online research. Customers have long gone digital. Perhaps you’ve even invested in paid search or other forms of advertising to increase the amount of traffic to your site. But if your online presence isn’t performing up to your expectations, it may be missing an essential element: The human element.

<sup>1</sup> SALESFORCE, 2018





*Customer **experience** has emerged as the top decision-making criteria for consumers, and their expectations are higher than ever.*

### **Understanding the digital customer.**

So what do your customers want? They want to be treated like people. Whether you're communicating with them over the phone, via email, or online—84% of customers say that being treated like an individual, not a number, is very important to winning their business.<sup>2</sup> Differentiated experiences based on trust and understanding are essential, and they're willing to shop around to find them.

What else do they want? Responsiveness. Sixty-six percent indicate that instant, on-demand engagement is a critical decision-making factor in purchasing new goods and services.<sup>3</sup> When reaching out to a business, over 80% of customers expect a response within an hour, but most aren't willing to even wait that long—75% expect help within five minutes.<sup>4</sup>

<sup>2</sup> IBID  
<sup>3</sup> IBID  
<sup>4</sup> MCKINSEY & CO, 2017

# Expectations of the digital customer.

**Connected, informed, and armed with the power of choice—digital customers demand a differentiated experience.**

Customers have more access to information and more choices than ever before, and they're willing to use these to research and find businesses who'll provide them with the type of experience they want. A customer's journey to purchase is no longer a linear path. The average customer uses ten channels to communicate with companies and considers six of those "preferred," meaning that they expect you to be there—from social media to online review sites, to phone calls and texting, websites and online chat, and even voice-activated personal assistants like Siri and Alexa.

If you're not meeting them where they are, you risk losing more than just their business. You'll also lose their recommendation. This happens more often than you might think. In an era where the customer reigns supreme—businesses are missing the mark. While 80% of companies believe they provide excellent customer service, only 8% of customers agree.<sup>5</sup> If these statistics come as a surprise, you're not alone. There's a good reason you might not know about the gulf between customer expectations and business performance: an estimated 9 out of 10 consumers who are unhappy with a brand will just walk away without ever complaining.<sup>6</sup>

95%

expect to be treated as a valued individual.

66%

expect instant, on-demand engagement.

59%

expect tailored, personalized communications.

<sup>5</sup> SALESFORCE, 2017  
<sup>6</sup> FORBES, 2017

# Meeting them where they are.

## What happens if you're not there?

You'll not only lose their business but all the potential business they might have referred. They'll quietly hang up the phone, ghost you on social channels, and leave your website, often without you knowing that they were ever there in the first place. Then they'll loudly tell all their friends about the lousy experience they had with your company when all they were trying to do was give you their business.

## What happens if you're there?

They'll not only reward you with their business but also their loyalty. They know their expectations are high. 67% of customers openly state that their expectations for good experiences across all of their engagement points with businesses are higher than ever. But that same pool of customers confirms that they're willing to pay more for that experience (67%) and that they're more likely to be loyal to companies that win their trust (95%).<sup>7</sup>

<sup>7</sup> HUFFPOST, 2017

# Delivering customer happiness.

As you might imagine, these “silent but deadly” customers can have a significant impact on your business. When a single, publicly-listed negative review—even one of questionable credibility—can threaten to sink a company,<sup>8</sup> no business can afford to ignore the conversations happening in on the sidelines.



happy digital customers

unhappy digital customers



**67%**

will pay more for a great experience.

← EXPERIENCE →

**57%**

went to a competitor for a better experience.

**72%**

share their good experiences with others.

← SHARING →

**62%**

share their bad experiences with others.

**95%**

are more likely to be loyal to a company they trust.

← TRUST →

**54%**

don't believe companies have their best interests in mind.<sup>5</sup>

<sup>8</sup> NEW YORK TIMES, 2018

# Superior customer experience.

The key to breaking silence, winning, and turning customers into advocates is to deliver a superior customer experience across all customer touchpoints. To customers, “superior” means personalized, human-centric, accessible, and fast. Your website is a core component of this strategy. But how do you make the experience customers have on your site more personal? How do you provide a human touch and fast, responsive service? Especially when you, as an owner, are busy with the day-to-day operations of your business?

Live chat has emerged as a leading communication channel for customers. Depending on who your target audience is, between 76% to 86% of your potential customers are using live chat to communicate with businesses that they’re considering making a purchasing from.

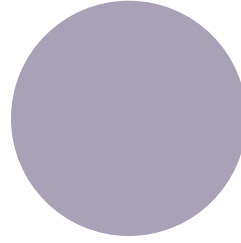
**In the next section, we’ll explore chat, why it matters, and the different options you have for integrating chat into your online experience.**

\*\*\*\*\*

76%-  
86%

of your target audience is using live chat to communicate with businesses.





# Let's chat about chat.

## What is live chat?

Live chat is a web-based form of communication that allows companies to engage with their online site visitors—enabling real-time interactions, increasing sales conversion, and building loyalty and satisfaction. If you've ever visited a website and been greeted by a pop-up box encouraging you to “chat now” with a support agent, you've seen a company's live chat tool in action.

But chat isn't just for customer support. Live chat can be an essential part of your customer engagement strategy—the way you connect with, market your services, and sell your solutions to customers. Every contact you make with a customer is considered a “touchpoint,” and live chat is no different. Along with phone calls, emails, social media interactions, and in-person visits, as a touchpoint, live chat can have a dramatic impact on your company's reputation.



## Why does live chat matter?

Live chat stands apart from other customer touchpoints in its speed, convenience, and efficacy. But it also is differentiated by its proactivity. If done well—with live chat, customers are not only able to get the exact information they need, when they need it, but also benefit from the proactive outreach of an informed representative prepared to assist from the moment they hit the website.

Perhaps this is the key reason, among many others, that 42% of all customers prefer chat over other communication channels, such as email (23%) and social media outreach (6%).<sup>10</sup> According to eDigital's Customer Service Benchmark, which surveyed thousands of people on their customer service interactions, the number of customers not just using chat, but choosing to use chat over other channels of communication will continue to grow as generational shifts take place. For example, while 24% of Boomers prefer chat, 53% of Millennials and Gen Zers prefer it.<sup>11</sup> This shouldn't come as a shock considering that younger generations are conditioned to text before calling or sending an email. Among members of Generation Z, 96% use text-based apps every day.<sup>12</sup>

Given not just the obvious demand but the ability to deliver exceptional customer experiences proactively, you'd think service-oriented businesses would be zeroed in on live chat. And yet, only 14% of companies use it.<sup>13</sup> That means 86%, likely including your competitors, either undervalue chat or don't know about it at all. Chat presents an uncommonly significant and advantageous opportunity for you to differentiate.

73%

of consumers were satisfied with their experiences on live chat—the highest level of all customer service channels.<sup>9</sup>

<sup>9</sup> INVESPCRO, 2018

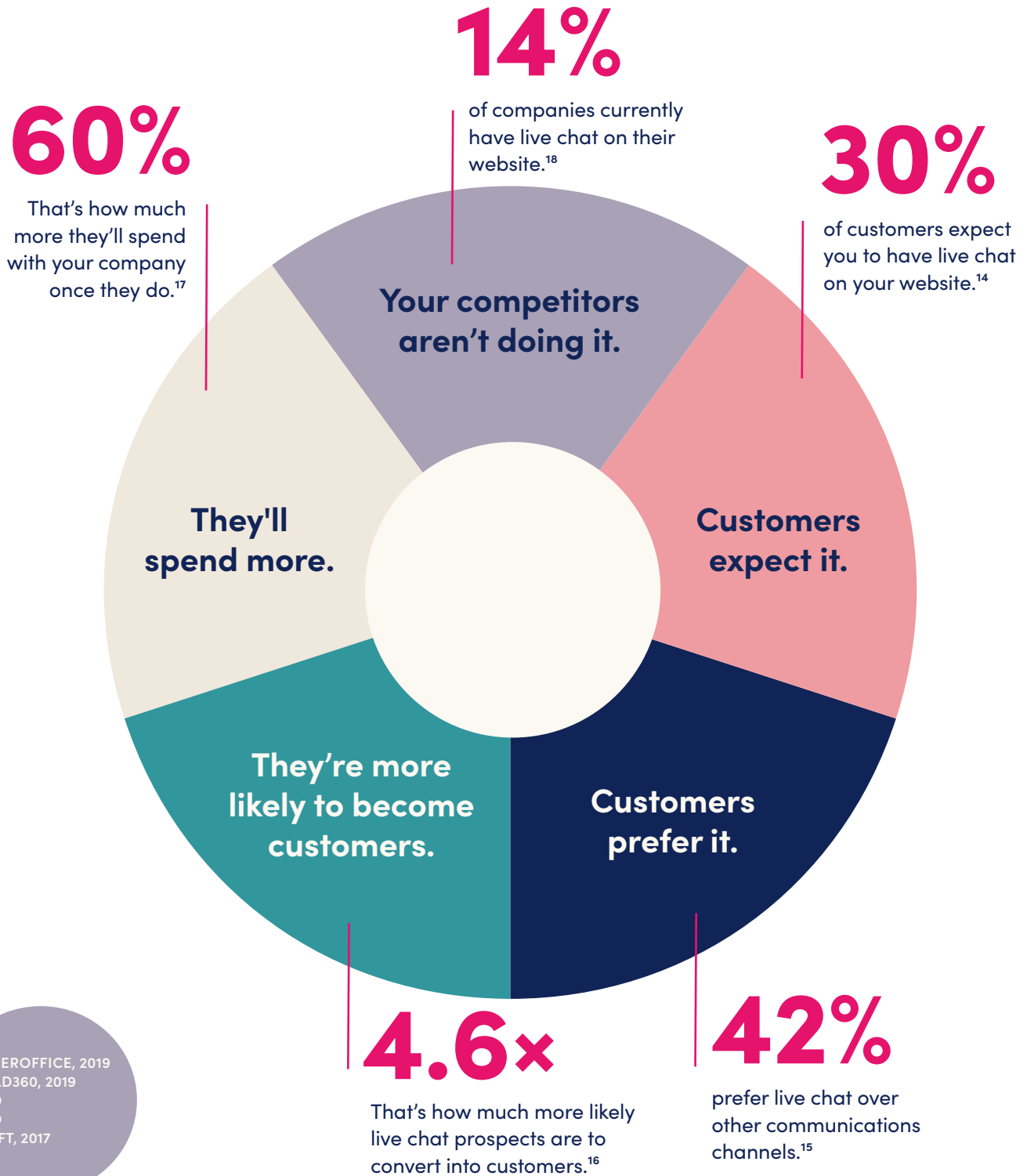
<sup>10</sup> BOLD360, 2019

<sup>11</sup> SALESFORCE, 2018

<sup>12</sup> MOBILESTATISTICS.COM

<sup>13</sup> DRIFT, 2017

# Five reasons to add live chat to your site.



<sup>14</sup> SUPEROFFICE, 2019  
<sup>15</sup> BOLD360, 2019  
<sup>16</sup> IBID  
<sup>17</sup> IBID  
<sup>18</sup> DRIFT, 2017

# What can you do with live chat?

Live chat is a powerful addition to your toolbox. With live chat, you can do so much more than answer questions or provide customer support. You can initiate sales conversations, capture customer contact information, overcome sales objections in real time, and increase the ROI on your marketing dollars—all while making your customers feel valued with personalized service on-demand.



## MEET DEMAND AROUND THE CLOCK

Over 80% of customers expect a response within an hour.<sup>19</sup> That expectation doesn't end after 5 pm. Live chat can give customers immediate support whenever they need it, with specialists at leading chat services responding within an average of 45 seconds.

## EXTEND THE CAPABILITIES OF YOUR TEAM

For most companies, providing 24/7 live chat support means hiring more people. And increasing headcount isn't just costly, but complicated from an HR and compliance standpoint. Live chat service providers can meet this need without unnecessary stress, risk, costs, and paperwork.

## GENERATE NEW LEADS FOR YOUR BUSINESS

Live chat specialists can be trained by experts in your company's field, making them capable of handling the types of qualifying questions necessary to generate real leads. Chat specialists are proven to generate more leads than other tools and strategies. In many cases, these leads would not have otherwise been created.

## OVERCOME OBJECTIONS IN REAL TIME

As business-to-consumer communication has shifted away from face-to-face interactions and into the digital world, companies have lost the ability to overcome objections. More than a third (35%) of salespeople say overcoming price objections is one of the biggest challenges to any customer relationship.<sup>20</sup> Live chat gives you the chance to address customers' specific concerns in real time.

## GATHER ACCURATE CUSTOMER DATA

Live chat specialists are able to form relationships with customers from the moment the chat begins—before your company even needs to request information. Specialists can be trained to gather specific data, answer questions throughout the process, and clarify any misunderstandings that may occur.



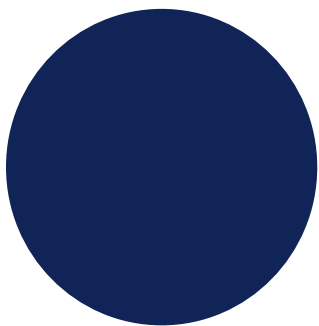
<sup>19</sup> MCKINSEY & COMPANY, 2019  
<sup>20</sup> HUBSPOT, 2016

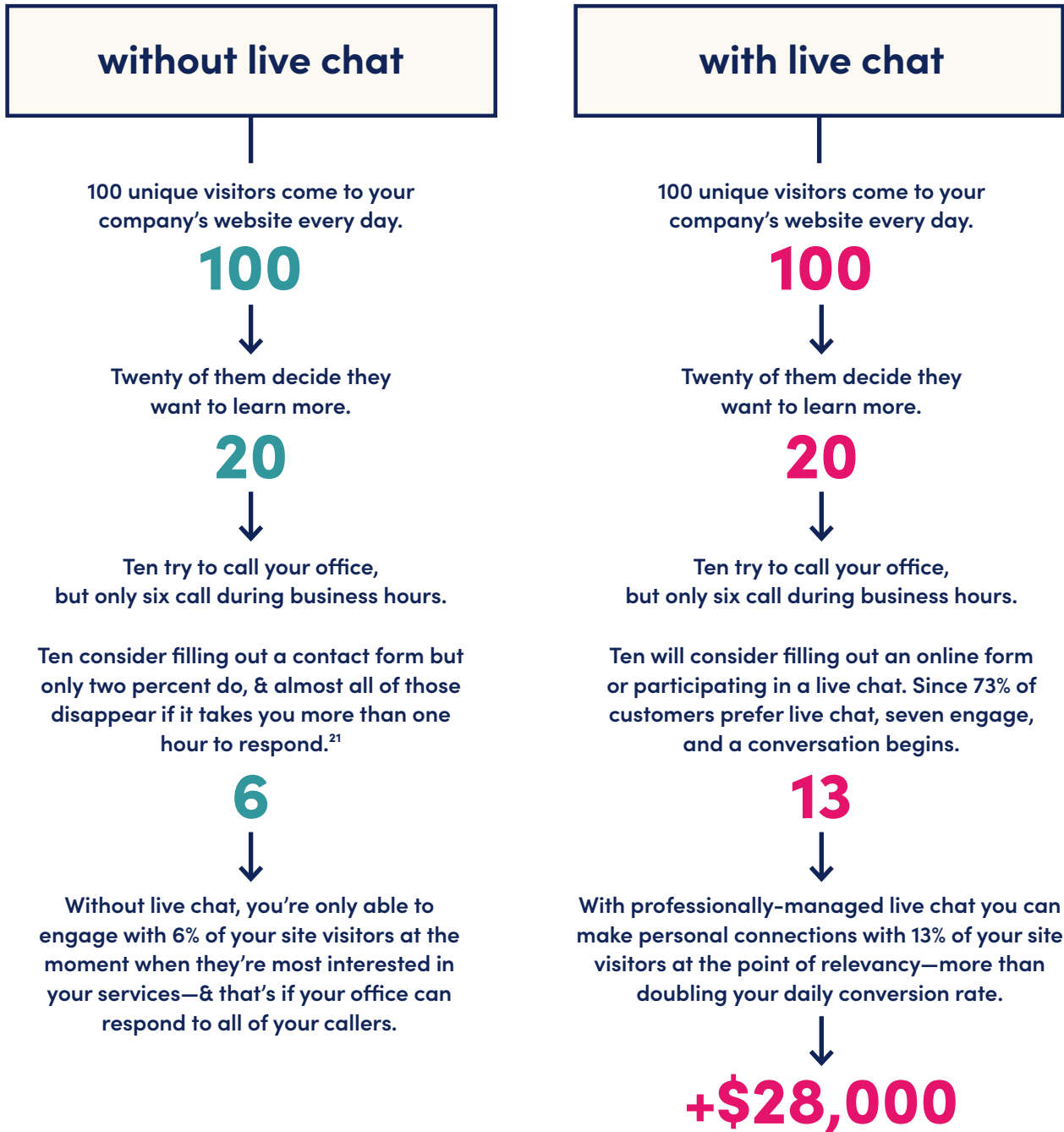
# Six ways to boost your business with live chat.



# What could live chat look like at your business?

Let's take a look at a concrete example of how live chat can transform a business. Imagine you run a law firm. Your website attracts about 100 visitors per day. In one day, let's say 20 of those visitors want to get in touch with your office. Approximately 12 of those people will try to contact you during business hours (9 am–5 pm). The other eight will attempt to get in touch during the evening, middle of the night, or early morning.





If your average case is worth \$4,000, that's an additional \$28,000 of revenue potential per day created with the simple addition of live chat services to your website!



**PRO TIP: ADD VIRTUAL RECEPTIONIST SERVICES FOR EVEN BETTER RESULTS**

Keep in mind that chat is one touchpoint among many. Combine live chat capabilities with on-demand receptionist services, and you'll never miss an opportunity again. If ten people call your office—including four after-hours—almost all of them are guaranteed to speak to a real person, either a member of your staff or a virtual receptionist.

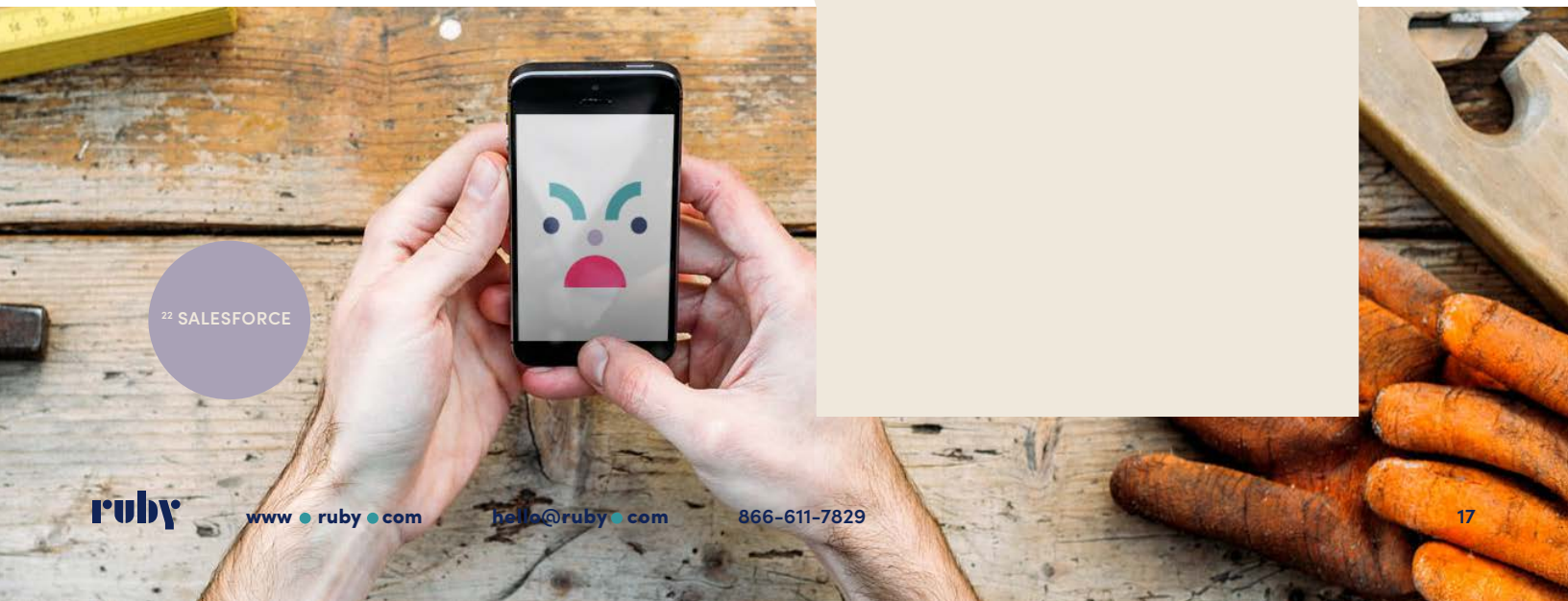


# When chat doesn't work.

It's obvious that adding live chat capabilities to your site can offer myriad benefits, from increased customer satisfaction to improved marketing effectiveness and more—all of which are reflected on your bottom line. But it's important to understand that all live chat services are not created equal. In fact, sometimes "live" chat isn't even live!

Remember those decision-making criteria we discussed and what's most important to your customers when purchasing goods or services. 84% said that being treated like an individual, not a number, is very important to winning their business. That means a real, empathetic human being with the ability to understand the context of what they need and respond with tailored, personalized communications, via phone, email, and yes—chat.

Some low-cost solutions ignore this and use artificial intelligence (AI) or offshore labor to save on overhead. Make no mistake: these shortcuts don't work. No bot can replace a human connection, and comprehension is an essential element of conversation. Live chat doesn't have to be expensive, but cutting corners can come at a cost.



<sup>22</sup> SALESFORCE

## AI can't deliver the same customer experience as live chat.

AI may sound futuristic but it's already here, and you've probably already interacted with it in some way. AI is ideal for specific contexts, like filtering out unwanted mail and spam based on your email usage (Gmail), serving up product recommendations based on your purchase history (Amazon), and helping you find the best new binge-worthy show (Netflix) or nearby Happy Hour (Google Maps).

Where AI often falls flat, however, is in language comprehension and human interactions that require deeper context and understanding. If you've ever asked Siri or Alexa a question, just to get a totally unrelated response, you know what that means.



*75% of people want to know when they're talking to a chatbot, and more than half find poorly concealed AI "disturbing" or "patronizing."<sup>22</sup>*

Website chatbots are no exception. Not only are they often ill-suited to respond to many customer queries, but they don't like interacting with them. Plainly speaking, chatbots make people either uneasy or plain resentful when they feel the bot is masquerading as a human. And, customers can tell when they're speaking to a bot versus a person. A chatbot has yet to pass the Turing Test, which evaluates whether a machine can exhibit behavior indistinguishable from a human being. The reason is that AI lacks empathy. It can't express the authentic feelings—like appreciation, gratitude, love, regret, and delight—that bind people together.

When customers do try to get their questions answered or needs met via a bot, they're often stymied by the natural language barrier. Roughly two out of three consumers say chatbots are only "somewhat effective" or "not effective at all" in resolving their issues.<sup>23</sup> When consumers have negative experiences with a chatbot, 73% will never interact with the chatbot again. And a majority of consumers (61%) find negative chatbot experiences exponentially more frustrating than human-to-human customer service interactions.

the bottom line:

**73%**

of consumers prefer live chat to AI.<sup>24</sup>

<sup>22</sup> MINDSHARE, 2016  
<sup>23</sup> STATISTA, 2017  
<sup>24</sup> ACQUIRE, 2019



# What can a live chat specialist do for you that a bot can't?



Create personal connections with customers.



Incentivize potential buyers to provide contact information.



Engage in friendly, non-scripted conversations.



Understand content and proactively solve problems.



Facilitate live call transfers to your sales team.



Represent your business and brand professionally.



# Offshore chat agents struggle with language barriers.

Language barriers aren't just a challenge for bots—they can be a challenge for live agents as well when companies offshore their chat services. International labor certainly offers cost efficiencies over domestic workers, but many agents working in offices overseas only have adequate knowledge of the language your customers speak. A lack of fluency creates gaps in the understanding of colloquial phrasing, sarcasm, and other small details essential to building relationships. It's difficult for a non-fluent speaker to effectively communicate the nuances of brand identity and apply them to a real-time conversation with a customer.

Language barriers can also cause lag. Offshore specialists may need to pause to carefully read and translate customers' chats. Even when specialists can respond quickly, they're frequently overworked, as low-cost chat providers compel staff to handle multiple clients at one time, resulting in errors and delays. Outsourced live chat is a recipe for loss of quality and brand inconsistency.

# What can US-based chat specialists offer that offshore labor can't?



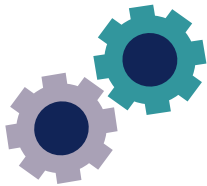
Native-level language fluency.



Cultural lens & context.



Focused time & support.



Customized & specialized service.



Enhanced quality & satisfaction.



Increased security & privacy.

# Natural language nurtures natural human connection.

In the end, there is only one truly effective way to make live chat into the experience-improving, lead generation powerhouse that it can be. The answer is real human interactions fueled by highly-trained, US-based specialists who understand and care about your business.

Only real people can speak like real people. Slang, shorthand, and even minor grammatical mistakes are all characteristics of fluent language speakers. Natural language also has a conversational pace and rhythm. Live chat with fluent (and ideally local) human representatives achieves this because it's the real deal—there's no robot to conceal, no language barrier to break through.

Imagine speaking with a customer experience representative as easily as you would with a co-worker, friend, or family member. That's the kind of live chat your customers want.



# How to choose the best live chat solution for your business.

So far, we've established that customers want, and are willing to pay more for, a differentiated experience. That being treated like a person, not a number, and fast, responsive service is critical to winning and keeping their business. And that live chat offers unparalleled opportunities to deliver on evolved expectations, create exceptional experiences, drive more leads and generate more revenue. So how do you choose a chat service provider?

There are dozens of live chat solutions out there. And with so many options to choose from, it's easy to feel overwhelmed. To help you evaluate which solution is right for your business, we've developed a quick, ten-question assessment.





## SCORECARD

# Critical questions for live chat providers.

When looking at solutions, ask yourself each of the following questions, then rate your level of confidence from one to ten, ten being the highest. After you've scored providers against the criteria below, take a look at your results. If your cumulative score falls below 80, consider another option.



PROVIDER  
A

PROVIDER  
B



- 1 Does the company have experience & expertise in my industry? .....
- 2 Are they compliant with my industry's regulatory and security requirements? .....
- 3 Am I able to customize their talking points about my business? .....
- 4 Do they offer support 24 hours a day, 365 days a year? .....
- 5 Does the company offer a money back guarantee? .....
- 6 Are the chat specialists professional, highly trained, & US based? .....
- 7 Is their chat solution easy to install? .....
- 8 Is their chat solution aesthetically-appealing and not invasive? .....
- 9 Can website leads be warm-transferred to my office from the chat company? .....
- 10 Does the company have a proven ROI with customers? .....

———— TOTAL ————

.....

# Why customers choose Ruby's live chat services.

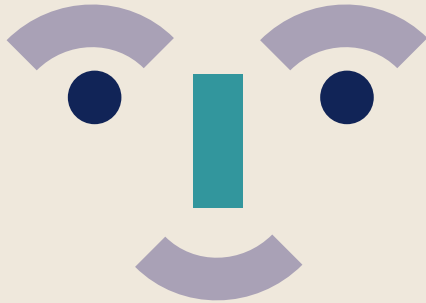
Trusted by more than 10,000 small businesses to deliver an exceptional customer experience, Ruby offers live, virtual receptionist and chat services, provided by professional, US-based agents.

Our chat specialists are highly-trained to provide a stellar customer experience, personalized for your unique business. Within 30 seconds of someone visiting your site, they're engaged, ready to make a positive first impression and comply with HIPAA practices. Using tailored information about your business provided by you, they act as an extension of your team—ensuring your prospects' and customers' needs are met, delighting them with spectacular service, and preventing them from leaving your site to go to a competitor. 24/7/365, they're there, helping you build your brand and grow your business.

Ruby's chat specialists work proactively to gather your site visitors' contact information and can even connect chat customers live to your team within seconds using our connect-to-call feature. Each chat transcript is captured in its entirety, along with the IP address and referral source (Google, etc.), providing you with vital context on your customers' needs, as well as the performance of your marketing dollars. Ruby sends notifications in real-time via email, text, and/or phone, so that you can act quickly. With our robust reporting features, in no time, you'll see the impact that adding live chat to your website can have on your bottom line.



# What customers have to say about Ruby's live chat.



*"Ruby has simply blown away my expectations of what an online chat service could ever achieve. They have rebuilt my trust in others being able to deliver the amount of value we strive to deliver to our clients daily."*

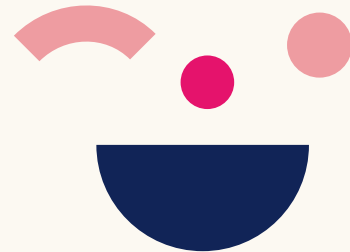
*Brian Leech*

SERVICE LEGENDS

*"In the first three months of service, Ruby captured 28 leads for my practice, converting into over \$103k in treatment revenue."*

*Jared Brader*

INTERMOUNTAIN AUDIOLOGY



# What customers have to say about Ruby's live chat.



*"Ruby really cares about their clients' success. There are a lot of options for vendors out there, and I would put their dedication among the best of the best."*

*Mike Agugliano*

CEO WARRIOR



*"Our best months have been since starting with Ruby's service. The team is an absolute pleasure to work with, and they go above and beyond. Highly recommend!"*

*Dr. Ben Fishbein*

FISHBEIN ORTHODONTICS





**Start turning  
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into customers  
with Ruby's  
money back  
guarantee.**

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