

Take Control! Techniques for Efficient Live Chatting



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TWO STRESSORS

1. Juggling multiple chats
2. Ending chats



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Happiness Engineer
Automatic

At the end of this session, you will be
able to:





1

Chat control

To juggle: set the pace and control the chat.

1. Ask questions.
2. Communicate your work.
3. Step it out.

1. Ask questions.

The person asking the questions is the one who is in control.

That person should be you.

ASK QUESTIONS



Repeat the user's question in your own words

- ▶ It sounds like you would like to do X but you're running into Y trouble — is that correct?



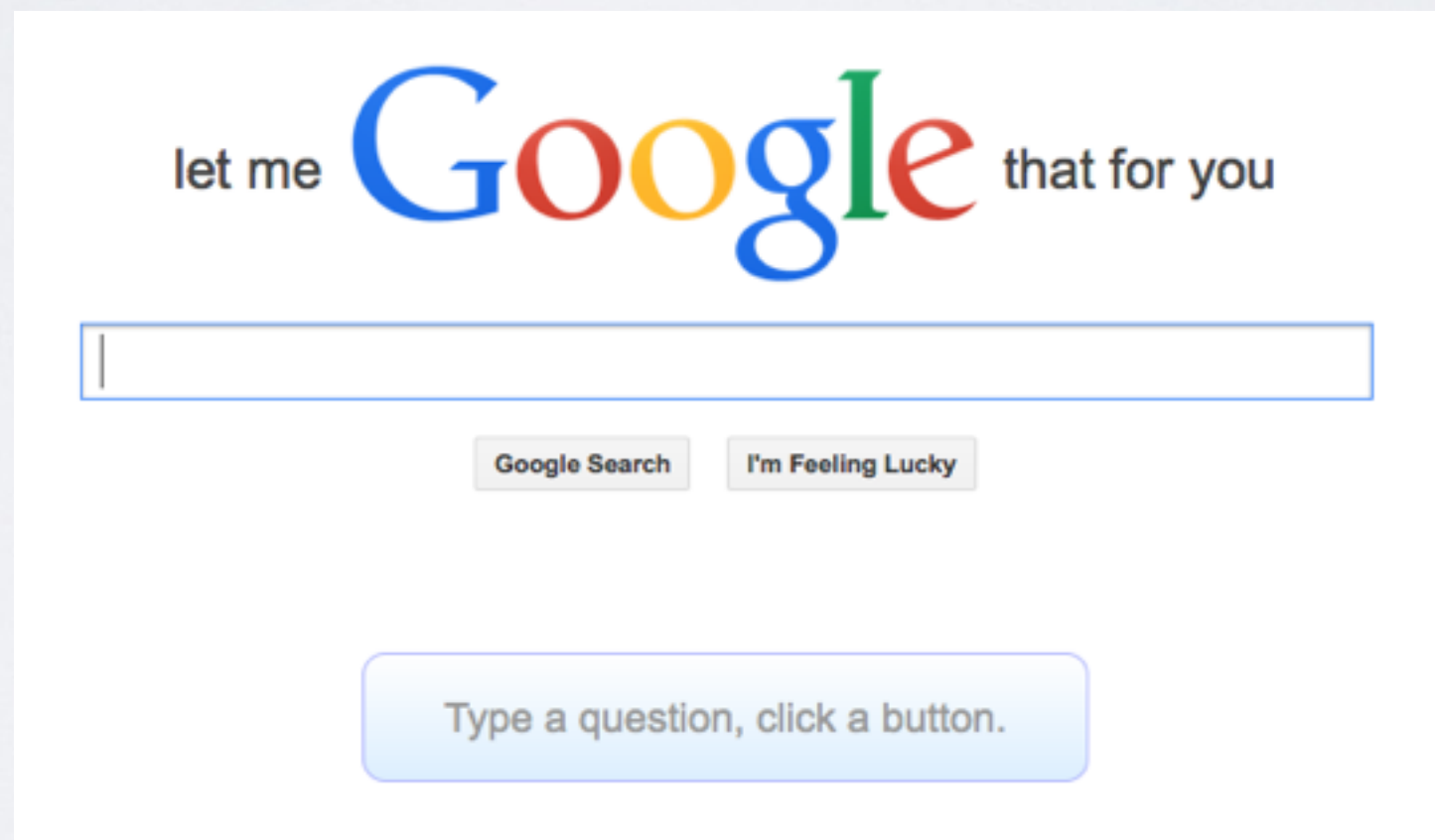
2. Communicate your work.

Setting expectations prepares the user to follow your lead.

COMMUNICATE YOUR WORK

Tell the user what you're up to and how long it will take.

- ▶ Thank you for the details. I'm going to look into this — I will be a few minutes.



Communicating your work helps:

- Set expectations
- Reassure the user
- Create a partnership

3. Step it out.

Numbered steps pace the chat.

STEP IT OUT

Step 1: Place Cup Upright at Edge of Table



Stepping things out paces the chat,
allowing you to check on other
users while this one does
“homework.”

2

Ending

Three components of an /end

1. Pre-end.
2. Empower.
3. Close.

1. Pre-end

Nudge towards /end.

PRE-END

- ▶ It looks like that took care of the question(s) you had when you opened this chat.
- ▶ We covered a lot today!
- ▶ Great job! You deserve to take a break.

2. Empower.

Move the user from
dependent to
independent.

EMPOWER

- ▶ Awesome work! You've become familiar with your dashboard, and I think you're ready to go it alone.
- ▶ Try the steps I gave you on your own. If you get stuck, start the chat window and let us know what step you're on.
- ▶ Well done! Keep going with what we worked on together. When you're ready for the next step, check out this page ____.



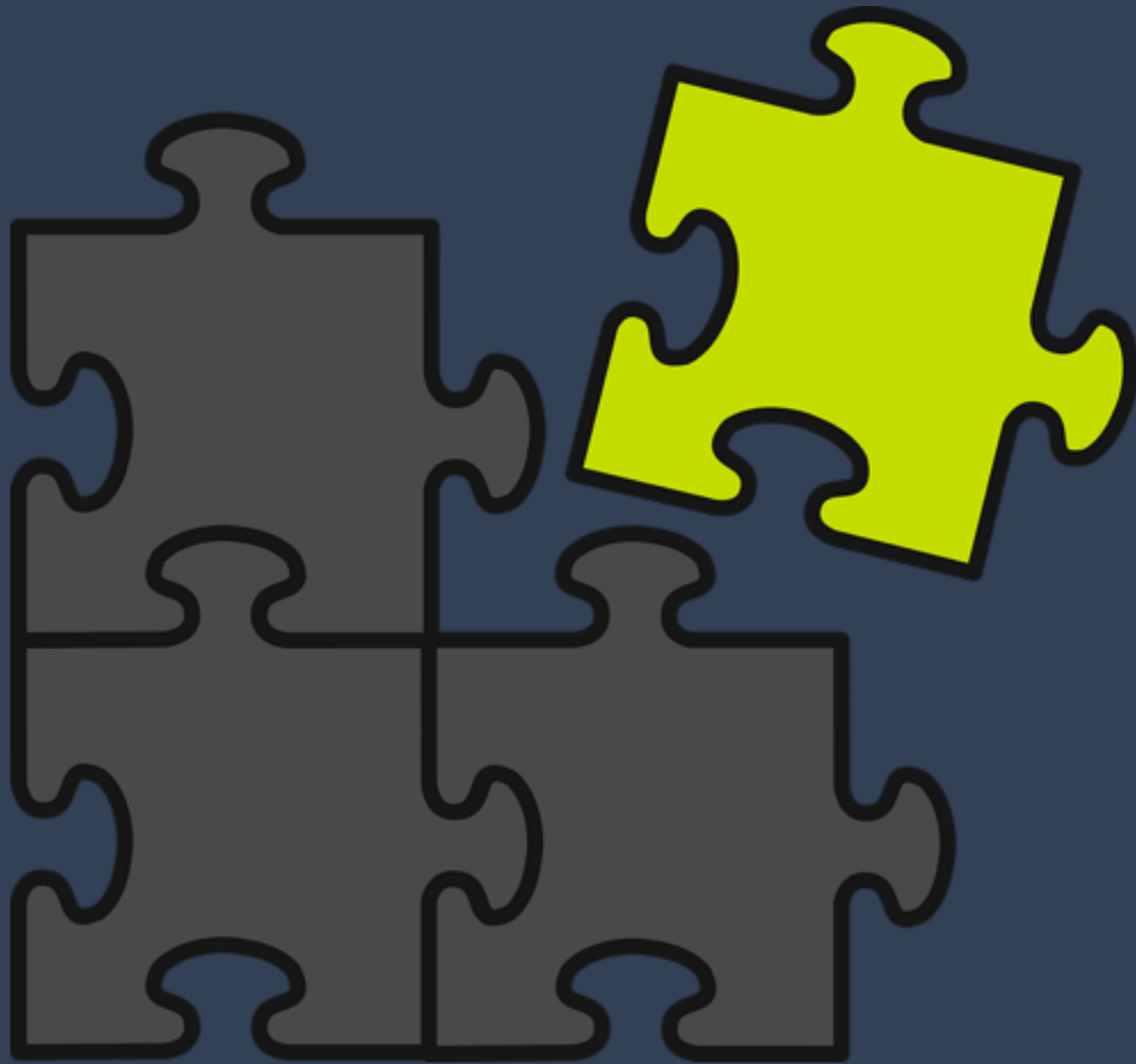
3. Close.

End the chat.

CLOSE THE CHAT

- ▶ I'll end this chat so you receive an email transcript with the links.
- ▶ If you need to reach us again, feel free to open a new chat. Have a great day!
- ▶ If you run into any trouble on those next steps, open a chat with us and we'll be happy to help.

Putting it all together



- ★ We covered a lot today! Great work — you know how to do this now.
- ★ I'll end this chat so you'll receive an email transcript with everything we discussed.
- ★ If you have more questions later, feel free to open a new chat.

3

Let's practice!

SLACK LIVE CHAT

1. Break into groups of 3.
2. We will do three rounds of chatting, so that each of you will get a chance to be a customer twice, and an operator once.
3. There is an A, B, and C customer in each group.

SLACK LIVE CHAT

1. Customer A will start as the first Agent.
2. Customers B and C will role play as customers and will ask the a set of questions from their worksheets.
3. The questions relate to Slack. They won't all be answerable, but that's ok, neither are all chats. For help as the agent:

`get.slack.help`

SLACK LIVE CHAT

1. After 4 minutes, I'll notify you that it's time to start wrapping up the chats.
2. At five minutes, it will be time to close the chat.
3. Customer B becomes the next agent, and A and C will ask their questions. We'll then repeat the process for Customer C as the agent.

Cheat sheet

Control

1. Ask questions.
2. Communicate.
3. Step it out.

End

1. Pre-end.
2. Empower.
3. Close.

Thanks



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AUTOMATIC