

Upgrading Your Customer Care with the NEW ATS Chat Module for iMIS

Presented by:

Association Technology Solutions



About ATS

- Serving iMIS community since 1995
- Full-service Authorized iMIS Solutions Provider (AiSP)
- Application development to extend the functionality of iMIS
- 2015 Authorized iMIS Solution Provider (AiSP) of the Year



Hosted by



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Why Offer Chat?

- Convenience for Customers
- Cuts Down on Expenses
- Increases Sales
- Exposes Customer Challenges on your Website
- Transcripts help Improve Customer Service



Why Offer Chat?

- 90% of customers consider live chat helpful
according to an [ATG Global Consumer Trend study](#)
- Seeing the **Live Chat** button bolsters confidence
- Customers like knowing that they can get immediate help
- *“The higher levels of satisfaction with online chat are partially due to the efficiency and immediacy of the experience”*
-Kirk Parsons, Sr. Director Telecom Services, J.D. Power

What do Millennials Think?

“Waiting on hold for customer service is mostly a thing of the past. Millennials are increasingly looking to online searches, live chat and social media to troubleshoot technical issues, and both Gen X-ers and Boomers are following suit.”

Source: <http://www.cio.com/article/2945372/retail/millennials-skip-traditional-customer-service-for-online-troubleshooting.html>



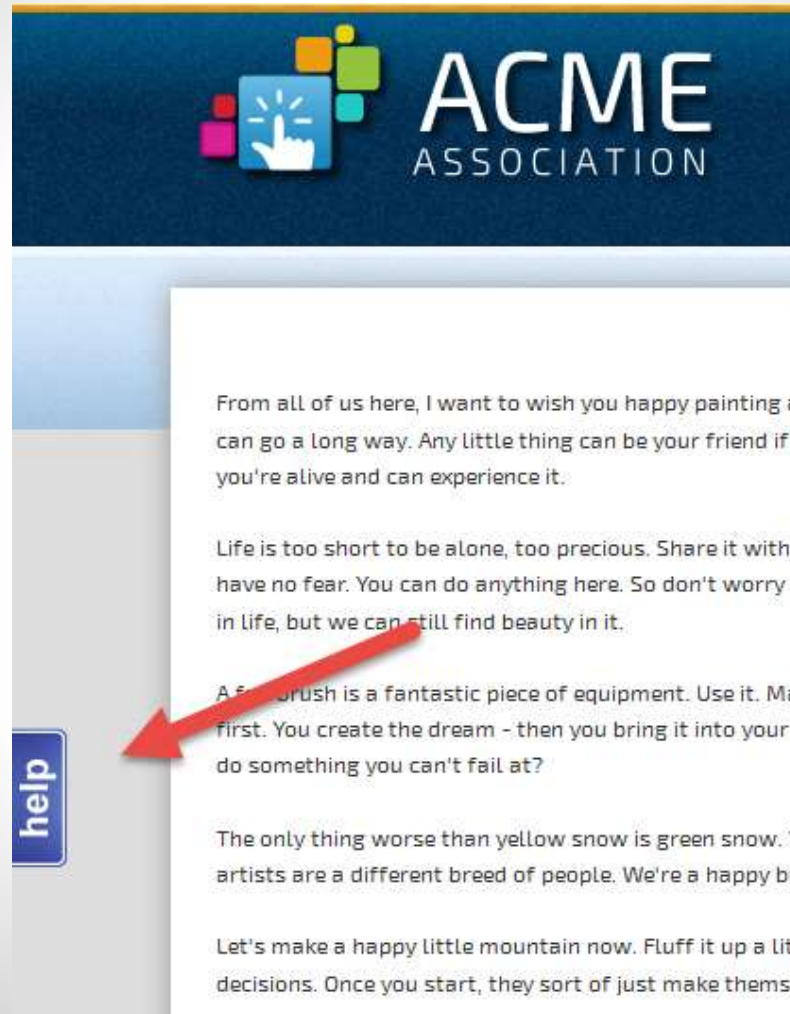
When to use Live Chat?

- *At least* one operator is available for the *majority of the working day*
- To increase your conversion rate or capture interested people who may otherwise simply leave the site
- To follow traffic and page views in *real time* to find out how your site is being used
- To be more proactive in supporting your customers and to learn more about their needs

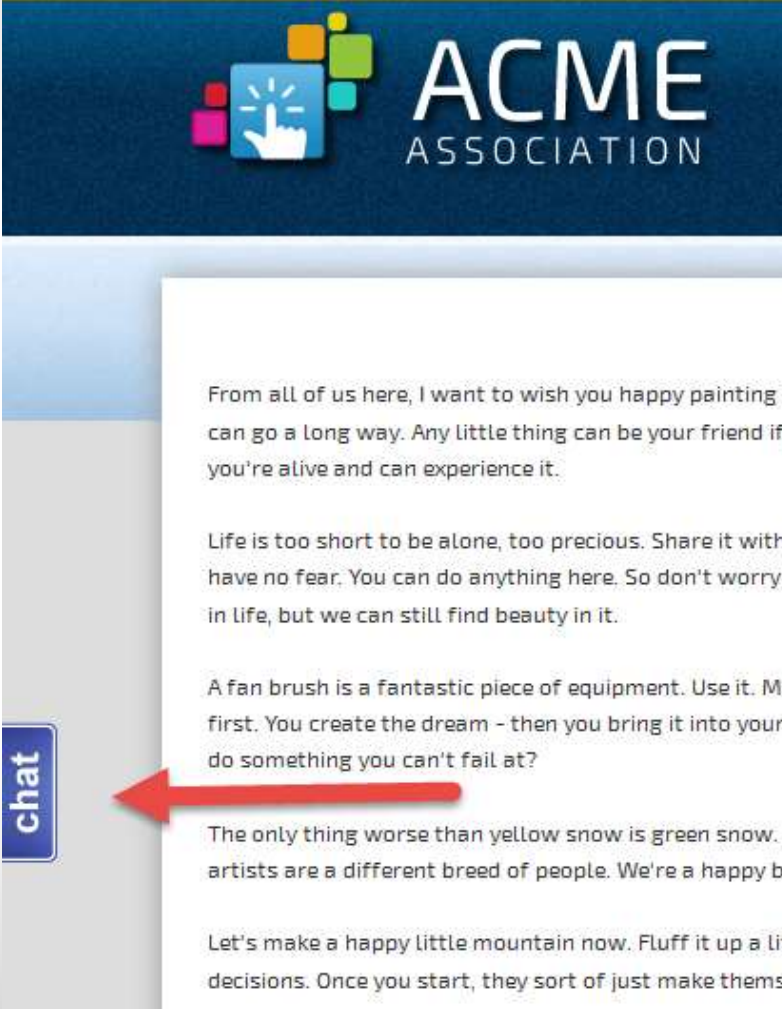
What is the End User Experience?

- End users will see an option on the website to chat
- No agent? User can leave a message
- If they engage in chat they will see a window where they can type in their questions or comments and get responses back from the chat agent

Button can be added to pages



Changes text when agents are available



The screenshot shows a chat interface for the ACME Association. At the top, there is a dark blue header with the ACME Association logo, which consists of a hand cursor icon pointing at a screen surrounded by colorful squares. Below the header is a white chat window. On the left side of the chat window, there is a blue button labeled 'chat'. A red arrow points from this button to the first line of text in the chat window. The text in the chat window is as follows:

From all of us here, I want to wish you happy painting a can go a long way. Any little thing can be your friend if you're alive and can experience it.

Life is too short to be alone, too precious. Share it with have no fear. You can do anything here. So don't worry in life, but we can still find beauty in it.

A fan brush is a fantastic piece of equipment. Use it. Ma first. You create the dream - then you bring it into your do something you can't fail at?

The only thing worse than yellow snow is green snow. V artists are a different breed of people. We're a happy bu

Let's make a happy little mountain now. Fluff it up a litl decisions. Once you start, they sort of just make themse

Pre-Chat Survey

The image shows a pre-chat survey form with a dark blue header bar containing a speech bubble icon and the text "Contact Us" with a close button (X). Below the header, there are two main sections: "Your email:" and "Your question:". The "Your email:" section has a text input field containing "emilyboutin@imisdemo.com". The "Your question:" section has a larger text area containing the text "I'm considering becoming a member of ACME, but I have a few questions." At the bottom of the form, there is a logo for "snap Powered by engage" and two buttons: "Email us" and "Chat with us".

Contact Us

Your email:

emilyboutin@imisdemo.com

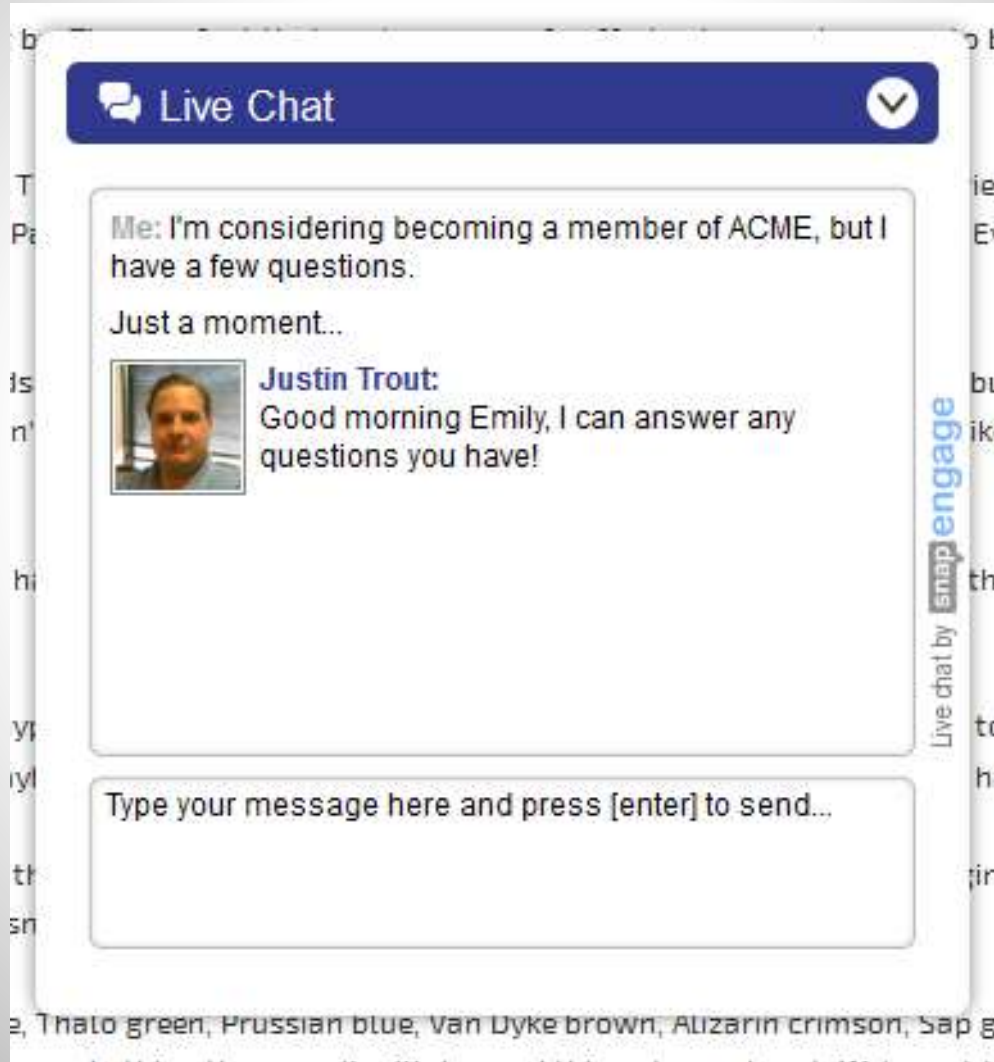
Your question:

I'm considering becoming a member of ACME, but I have a few questions.

Powered by **engage**

[Email us](#) [Chat with us](#)

Chat Window



Post Chat Survey

my friends. Don't fight it, use what happens. with something so strong,
e v

ur
18 5

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t fa

o b

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ha

go
at f

o green, Prussian blue, Van Dyke brown, Alizarin crimson, Sap green, Ca

Live chat by **engage**

How would you rate your chat with Justin Trout?

★★★★★

Very helpful

Any comments you wish to add?

Submit or Cancel

What is the Staff Experience?

- Staff member will see that there is someone wanting to chat
- View matching iMIS record for chat user
- View chat transcript on the iMIS record


Agent Portal

The screenshot displays the iMIS Agent Portal interface. On the left is a dark teal sidebar with a navigation menu including: Community, Dashboard, Find contacts, Add contact, Manage duplicates (PLUS), Committees, Communities, Security, Live Chat, Agent Portal (highlighted), Manage Chats, Membership, Fundraising, Events, Commerce, Marketing, Certification, Continuum, RISE, and Settings. The main content area features a search bar at the top with the text "Keyword search". To the right of the search bar, there is a user profile for "Justin Trout" with a status of "AVAILABLE" and an "Admin Dashboard" button. Below this, a chat window is open with a contact named "Emilyboutin" (emilyboutin@imisdemo.com). The chat interface includes a header with "Request File", "Upload File", "Secure Data Transfer", "Ban", "Transfer", and "Bye" options. The chat history shows a system message at 9:38 AM: "if iMIS data for this user has been retrieved, it will be displayed above." and a note: "Don't forget: use the command 'imisid=12345' to set the iMIS ID of the user in the chat!". A visitor message at 9:38 AM asks: "I'm considering becoming a member of ACME, but I have a few questions." Justin Trout responds at 9:37 AM: "Good morning Emily, I can answer any questions you have!". At the bottom, there is a status bar showing "Closed Chats" and "Agents" counts, along with various utility icons.

Matching




- Chats are automatically matched to users in iMIS
- If more than one match, chat agent picks appropriate match
- Matching is done on email address

Manage Chats






Community


- Dashboard
- Find contacts
- Add contact
- Manage duplicates **PLUS**
- Committees
- Communities
- Security
- Live Chat
- Agent Portal
- Manage Chats**

MANAGER   

Chats List

	ID	Name	E-mail	Company	Question	Start	End	
					I'm considering becoming a member of ACME, but I have a few questions.	2016-07-06, 9:36 AM	2016-07-06, 09:39 AM	Match User  Archive 

Show matched chats? ON OFF

The Chats List automatically refreshes every 60 seconds
Last Update: 7/6/2016 9:53:54 AM 

*Chats which have been matched to an iMIS record are **not** currently included.*

 Association Technology Solutions

Manually Match User

The screenshot displays the iMIS 'Match Users' interface. The left sidebar contains navigation options: Community, Membership, Fundraising, Events, Commerce, Marketing, Certification, Continuum, RISE, and Settings. The main content area is titled 'Match Users' and features a 'Suggested Matches' section. Below this, a table lists four suggested matches with their confidence levels, IDs, names, profile emails, companies, cities, and states/provinces. Each row includes a 'Select' button. Below the table is a 'Search for Matches' section with a form to search for users based on Name, Company, and E-mail, and a 'Find Matches' button.

Suggested Matches

The following matches are suggested based on the information the user entered when they initiated the chat. The confidence shows how close the match is to the iMIS record.

Match Confidence	ID	Name	Profile E-mail	Company	City	State/Province	Country	
100%	23069	Ms. Emily Boutin	emilyboutin@imisdemo.com	iMIS Foundation	Washington	DC		Select
88%	20422	Ms. Marie C. Belton	mbeilton@imisdemo.com		Ferris	TX		Select
87%	20911	Ms. Margarita Tolén	mtolen@imisdemo.com	Cokeson Partners	Bethesda	MD		Select
87%	22523	Mrs. ...	mbeilot@imisdemo.com	R&B	Ottawa	ON		Select

Search for Matches

Use the following form to search for the user for whom this chat is a match.

Name:

Company:

E-mail:

How to leverage this information

- Find out what pages result in the most chats
- Find out what people are chatting about
- Build an FAQ of frequently answered questions
- Help in training customer service staff

Chat History in iMIS

The screenshot shows the iMIS user profile for Ms. Emily Boutin. The 'History' tab is selected, and a red arrow points to the 'Chat history' section. The chat history table shows a single record from 7/6/2016.

Ms. Emily Boutin
Development Director
[iMIS Foundation](#)
Mobile: (508)668-7731

Member since: 10/2/2006
Member type: Staff
Status: Active

[Print info](#) [Public Profile](#)
[Email](#) [Resolve Duplicates](#)
[Donate](#) [Order](#) [Register](#)

Recent transactions

Order Number	Order Date	Type	Amount	Balance
4385.00	6/28/2014	Event - Webinar Series: National Regulations	150.00	150.00

Recent interactions

Date	Type	Subject	Owner
There are no records.			

Chat history

Start Time	End Time	Question	Chat Operator
7/6/2016 9:36 AM	7/6/2016 9:39 AM	I'm considering becoming a member of ACME, but I have a few questions.	Justin Trout view

Call history

Transaction Date	Assigned to	Action(s)	Note	Follow Up Date	Follow Up
There are no records.					

Billing history

See Chat Detail

The screenshot displays the iMIS user interface. On the left is a navigation sidebar with categories like Community, Membership, Fundraising, Events, Commerce, Marketing, Certification, Continuum, RISE, and Settings. The main content area shows the profile of Ms. Emily Boutin, a Development Director at IMIS Foundation, with contact information and a photo. A modal window titled "Edit" is open, displaying chat details for a conversation on July 6, 2016. The chat transcript shows a question from Emily about becoming a member of ACME and a response from Justin Trout. The modal also includes fields for E-mail, Start Time, End Time, Question, and Chat Operator. A "Cancel" button is visible at the bottom right of the modal. In the background, a "Recent transactions" table is partially visible, showing columns for Order Number, Order Date, Type, Amount, and Balance.

Order Number	Order Date	Type	Amount	Balance
			100.00	150.00

Edit

E-mail emilyboutin@imisdemo.com

Start Time 7/6/2016 9:36 AM

End Time 7/6/2016 9:39 AM

Question I'm considering becoming a member of ACME, but I have a few questions.

Chat Operator Justin Trout

HTML Transcript

[Jul 6, 2016 3:36:06 PM] Emilyboutin: I'm considering becoming a member of ACME, but I have a few questions.

[Jul 6, 2016 3:37:11 PM] Justin Trout: Good morning Emily, I can answer any questions you have!

[Jul 6, 2016 3:39:17 PM] Emilyboutin: I'm so sorry, I have to run into a meeting I've just been called to. Can I chat more with you later?

[Jul 6, 2016 3:39:49 PM] Justin Trout: Absolutely, no problem at all, just let me know when you have a few free minutes, and we can pick up the conversation.

[Jul 6, 2016 3:39:56 PM] Emilyboutin: Thanks!

Cancel

Search Transcripts Via IQA

Intelligent Query Architect

Search Chat Transcripts

Define Run Report Group Security

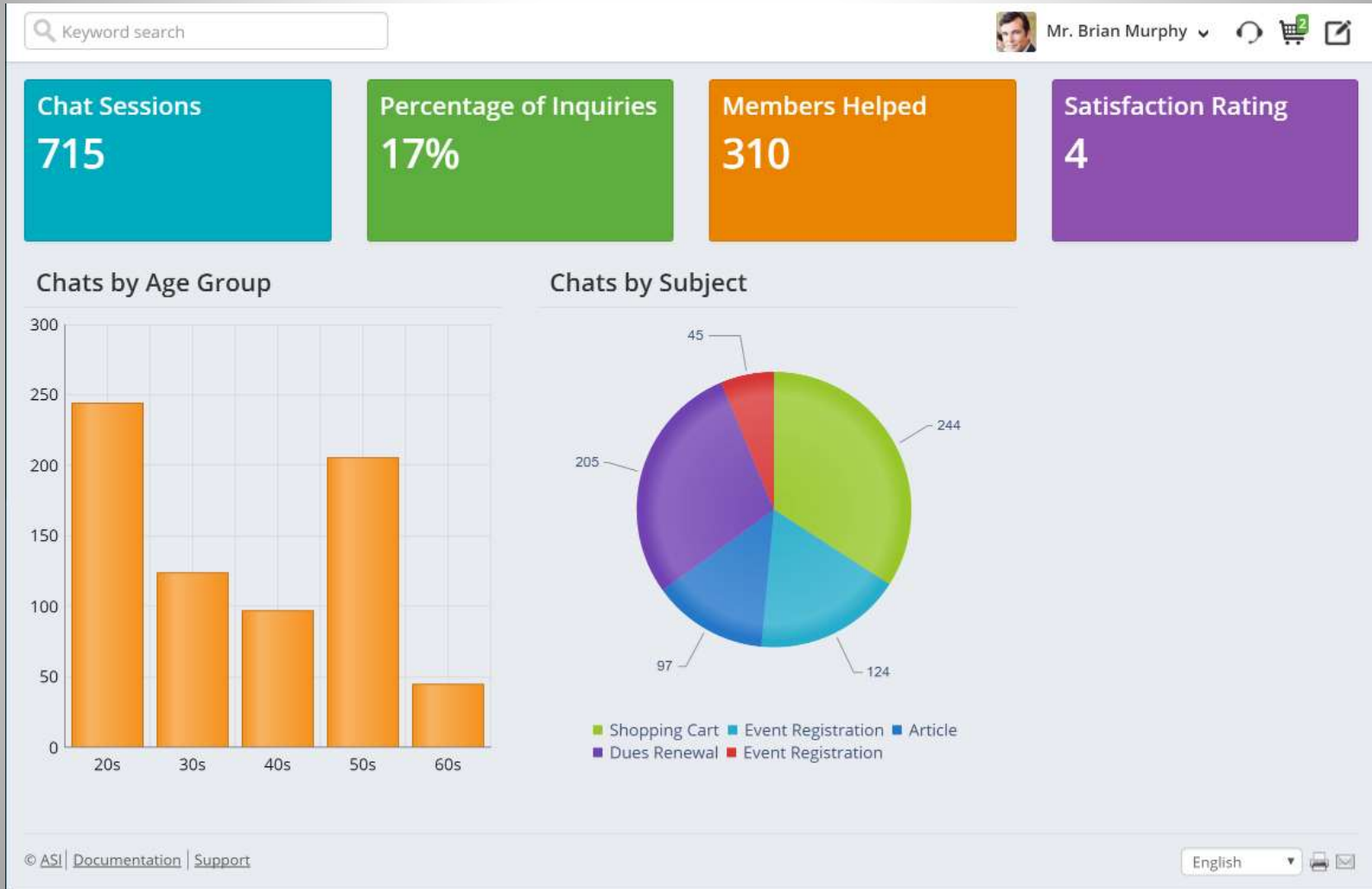
Save AS Save Close

*Keyword (or Phrase) becoming a member

Find

Chat Activity SEQN	ID	Start Time	End Time	E-mail Entered	Question	Agent	HTML Transcript
34304	194	7/6/2016 9:36:04 AM	7/6/2016 9:39:56 AM	emilyboutin@irmisdemo.com	I'm considering becoming a member of ACME, but I have a few questions.	Justin Trout	[Jul 6, 2016 3:36:06 PM] Emilyboutin: I'm considering becoming a member of ACME, but I have a few questions. [Jul 6, 2016 3:37:11 PM] Justin Trout: Good morning Emily, I can answer any questions you have! [Jul 6, 2016 3:39:17 PM] Emilyboutin: I'm so sorry, I have to run into a meeting I've just been called to. Can I chat more with you later? [Jul 6, 2016 3:39:49 PM] Justin Trout: Absolutely, no problem at all. Just let me know when you have a few free minutes, and we can pick up the conversation. [Jul 6, 2016 3:39:56 PM] Emilyboutin: Thanks!

Dashboards



Technical

- Leverages the robust hosted Snap Engage platform
 - Proactive chat (May I Help You?)
 - Target agents based on the page url
 - Canned responses
 - Screen sharing to help a member through the process
- Leverages Rise
 - Can be configured without Rise

Questions & Answers



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Question:

Are chat transcripts stored at the individual activity record level, or a general query location?



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Question:

Does the member have to be signed in for the chat to be logged in iMIS?



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Question:

Will this functionality work outside
of RiSE?



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Question:

Can you apply this to a group of pages rather than the entire site?



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Question:

If a user is logged in can we update the email address on their iMIS account if it is not what they currently have listed?



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Question:

Can prospects chat before they have a system profile?



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Question:

Is it easy to integrate with iMIS if we're already a Snap Engage client?



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Question:

What is the earliest compatible iMIS version?



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Question:

What is the pricing for both the Chat
Module and Snap Engage?



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Question:

Is it possible for email addresses to *not* be required to chat?



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Question:

Can you have different chat agents assigned to different areas of the country?



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Question:

Can chat sessions be transferred
between agents?



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Question:

Does the software allow for voice recording capabilities or will the chat agent have to type in all the responses?



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Question:

How do agents get alerted when a client uses the chat?



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Question:

Are you able to chat with other agents?



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Question:

How does it work with multiple agents?



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Question:

Are there any tones when someone is waiting to chat?



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Question:

Can a customer select a question category, and then direct them to the best agent for that question?



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Question:

OK, what's the catch?



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Question:

Does the chat let the customer know how long until an agent might be available?



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