

Chat for iMIS – Customer Service for Millennials

Presented by:

Association Technology Solutions

Joint Commission on Allied Health Personnel in Ophthalmology



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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Chat for iMIS

The World of Millennials

- Like to multi-task
- Instant access – Email is too SLOW!
- “Google It” is a new verb
- What’s in it for me?

Chat for iMIS

Who ENJOYS customer service phone calls?

- When was your last positive experience?
- Press "9" to hear your options again...
- On-hold music or advertising
- "I can't hear you"

About JCAHPO

- Established as a not-for-profit organization in 1969
- Offer certification and continuing education opportunities to ophthalmic allied health personnel
- More than 25,000 people in the U.S., Canada, and around the world have earned JCAHPO certification

About Byron

- Worked with associations and companies that use iMIS since 1998
- Started using iMIS at version 4.x when it ran on SyBase SQL.

The Problem

Too many phone calls and a remote staff
without a full featured office phone



The Solution

ATS Chat Module for iMIS



Remote Staff Challenges

- 18 support phone calls per day received by help desk
- Remote staff unable to transfer calls from home phone to other office extensions

Problem Solved

- Down to 9 support calls per day and 5 chats per day.
- Remote staff use the chat to
 - help customers
 - transfer the chat to other staff, or
 - direct the customer to call the office

Problem Solved

- One staff can handle multiple chats and a phone call at the same time
- Staff are limited to 2 chats at a time
- Chats are also quicker and easier than a phone call
- **Customers don't have to spell their names**
- Staff can copy and paste information to/from the staff site easily
- Average chat duration is under 3 minutes

Most Common Customer Issue

- Forgetting their username and password
- Tried a video explaining how to reset their password and retrieve their username
- Placed the chat module on the sign in page.

Sign In

Username

Password


Remember me

Sign In

[Forgot my password or my username](#)

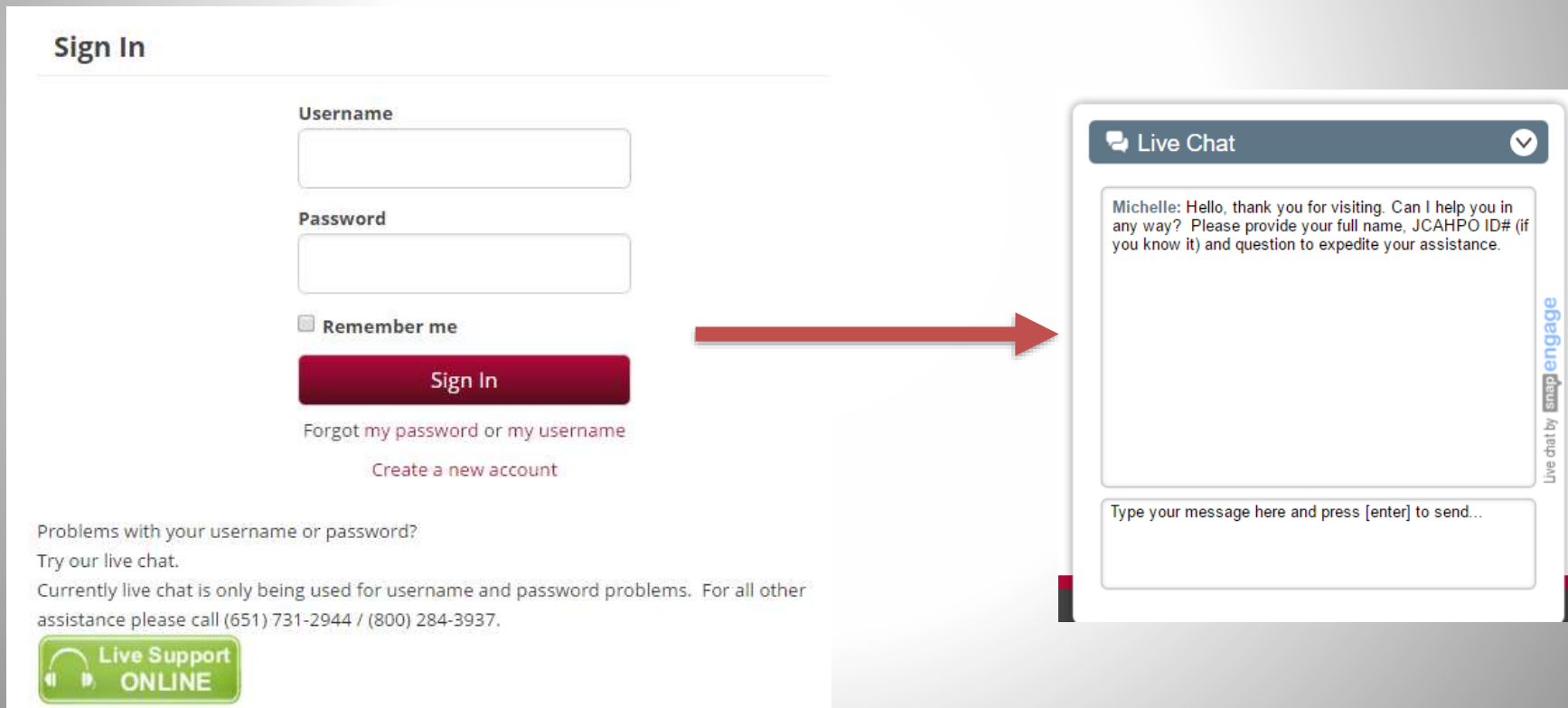
[Create a new account](#)

Problems with your username or password?
Try our live chat.
Currently live chat is only being used for username and password problems. For all other assistance please call (651) 731-2944 / (800) 284-3937.

 Live Support
ONLINE

Proactive Chat

- Pop-up after specified period of time



The image shows a sign-in page on the left and a live chat pop-up on the right. A red arrow points from the sign-in page to the chat pop-up.

Sign In

Username

Password

Remember me

Sign In

[Forgot my password or my username](#)

[Create a new account](#)

Problems with your username or password?
Try our live chat.
Currently live chat is only being used for username and password problems. For all other assistance please call (651) 731-2944 / (800) 284-3937.

Live Support ONLINE

Live Chat

Michelle: Hello, thank you for visiting. Can I help you in any way? Please provide your full name, JCAHPO ID# (if you know it) and question to expedite your assistance.

Type your message here and press [enter] to send...

Live chat by **snapengage**

Reactive Chat

- Customer can click on the Live Support ONLINE

The image shows a user interface with two main components. On the left is a 'Sign In' form with fields for 'Username' and 'Password', a 'Remember me' checkbox, and a 'Sign In' button. Below the form are links for 'Forgot my password or my username' and 'Create a new account'. At the bottom left of the sign-in area is a green button with a headset icon and the text 'Live Support ONLINE'. On the right is a 'Live Chat' widget with a title bar, a 'Your email:' field, a 'Full name, JCAHPO ID# (if you know it) and question:' field, and a 'Chat with us' button. A red arrow originates from the 'Live Support ONLINE' button and points towards the 'Live Chat' widget.

Staff Chat Workboard

- Additional monitor strictly for chat workboard highly recommended

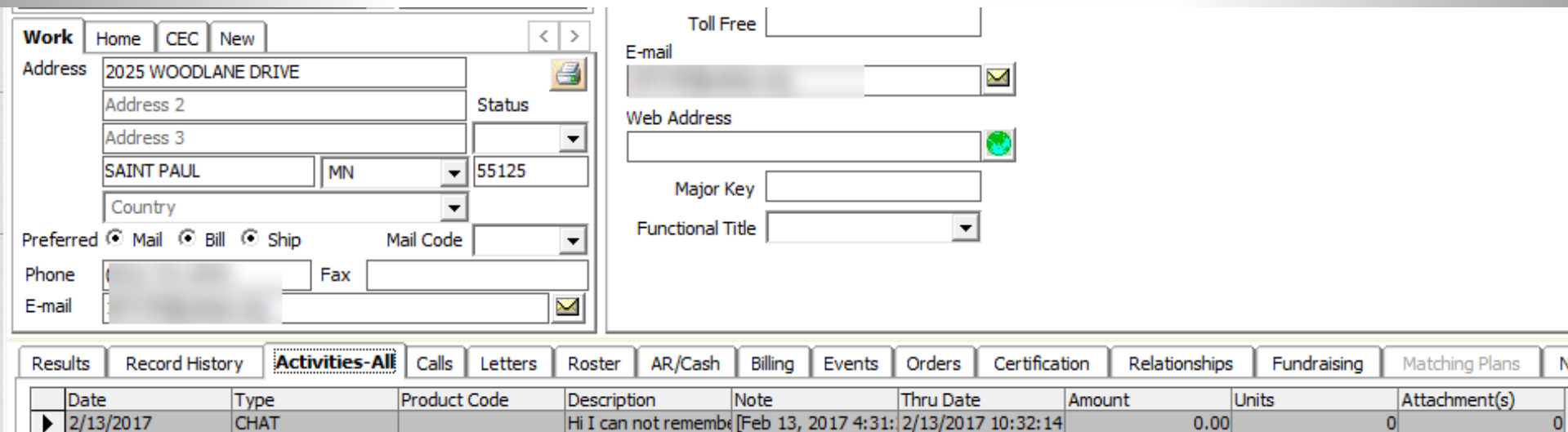
The screenshot displays the iMIS Staff Chat Workboard interface. On the left is a dark blue sidebar with a navigation menu including: Community, Marketplace Admin Portal, Live Chat, Agent Portal, Manage Chats, Chat Reports, CEC, Help Desk Reports, Membership, Fundraising, Marketplace Reports, Events, Commerce, Marketing, Certification, CERT Reports, Continuum, RISE, and Settings. The main content area features a search bar at the top, a user profile for 'Bpatterson' with an 'AVAILABLE' status indicator, and a 'snapengage' logo. Below the profile is a 'Your weekly stats' section with three metrics: Avg Response Time (0 min), Total Chats (0), and Average Chat Time (0 min). An 'Announcements' section contains a banner for the 'chatup LIVE CHAT BEST PRACTICES CONFERENCE' on May 18-19, 2017 in Boulder, CO, with a 'REGISTER NOW' button. Below this is a 'Latest SnapEngage News' section with three bullet points. A 'Did you know...' section provides tips on chat shortcuts and a feedback email address. At the bottom, there is a status bar showing 'Chats 00' and 'Agents 02'.

Active Chat Interface

The screenshot displays the iMIS Active Chat Interface. On the left is a dark blue sidebar with navigation options: Community, MarketPlace Admin Portal, Live Chat, Agent Portal, Manage Chats, Chat Reports, CEC, Help Desk Reports, Membership, Fundraising, MarketPlace Reports, Events, Commerce, Marketing, Certification, CERT Reports, Continuum, RISE, and Settings. The main chat area features a search bar at the top, a user profile for 'Byron' (status: AVAILABLE), and a visitor profile for 'Visitor from public.jcahpo.org'. The chat history shows a system message about iMIS data retrieval, a greeting from Byron, and a question from the visitor about a forgotten password. A map of Saint Paul, MN is also visible. The bottom status bar shows 'Chats: 1' and 'Agents: 2'. The interface includes a 'snap engage' logo and various utility icons like 'Request File', 'Upload File', and 'Secure Data Transfer'.

Chat Activity Record in iMIS

- Chat command \imisid=##### creates activity record on user's iMIS record
- Allows for later data analysis







The screenshot displays the iMIS user profile interface. On the left, the 'Work' tab is active, showing address fields (2025 WOODLANE DRIVE, SAINT PAUL, MN, 55125) and contact information (Phone, Fax, E-mail). On the right, there are fields for Toll Free, E-mail, Web Address, Major Key, and Functional Title. Below the profile is a navigation bar with tabs: Results, Record History, **Activities-All**, Calls, Letters, Roster, AR/Cash, Billing, Events, Orders, Certification, Relationships, Fundraising, Matching Plans, and N. The 'Activities-All' tab is selected, showing a table of chat activity records.

Date	Type	Product Code	Description	Note	Thru Date	Amount	Units	Attachment(s)
2/13/2017	CHAT		Hi I can not rememb	[Feb 13, 2017 4:31:	2/13/2017 10:32:14	0.00	0	0

Post-Chat Matching

- Community
- MarketPlace Admin Portal
- Live Chat
- Agent Portal
- Manage Chats
- Chat Reports

Chats List

	ID	Name	E-mail	Company	Question	Start	End	
>				JCAHPO	I am looking for a... [blurred]	2017-02-13, 10:06 AM	2017-02-13, 10:06 AM	Match User  Archive 
>				JCAHPO	... [blurred]	2017-02-13, 9:48 AM	2017-02-13, 09:51 AM	Match User  Archive 



Post-Chat Matching

Match Users



Search for Matches

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

ID

Name

Company

E-mail

Find Matches

Post-Chat Matching

- Ranked list of possible matches

Match Users

Search for Matches

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

ID

Name

Company

E-mail

Match Confidence	ID	Name	Profile E-mail	Company	City	State/Province	Country	
100%								<input type="button" value="Select"/>

Post-Chat Reporting

- Search the chats
- Quantity of chats for a date range
- Simply display the transcript

The screenshot shows a web application interface for chat reporting. On the left is a dark teal sidebar with navigation options: 'Community', 'MarketPlace Admin Portal', 'Live Chat', 'Agent Portal', 'Manage Chats', and 'Chat Reports'. The main content area is light blue and features a search form titled 'Chats Date Ranged'. The form includes a 'Date of Chat between' section with two date pickers and an 'Agent Equals' section with a text input field. A blue 'Find' button is located below the input fields. In the top right corner, there is a 'Select a query' dropdown menu. A white box on the right side of the main area contains the heading 'Chat Reports' and three links: 'Chats Date Ranged', 'Number of Chats Date Ranged', and 'Search Chat Transcripts'.

Customer Feedback

- "100/100!!"
- "Very helpful! Like the new feature!"
- "It's delightful to have such prompt service! Thank you!"
- "Very efficient!"

Benefits of Chat

- Reduced expense
- Can service MORE members than via phone
- Millennials and others prefer to chat
- Recorded chat provides insight
- Members view it as an additional service

Questions & Answers



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