

# Proactive Click to Call Overview



# LIVEPERSON Proactive Click to Call Overview

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# LIVEPERSON Proactive Click to Call Overview

## Value of the LivePerson Voice Channel

Leverage the power of the LivePerson platform and intelligent engagement methodology to deliver a seamless connection between your website visitors and call center agents.

Voice is recommended for the sales and support of complex products and services, and can deliver a greater ROI when deployed strategically to target the right customers at the right time, connecting to the right agents. It can also be offered in a multichannel invite or button, which offers customers the choice of chat or voice communications.

Benefits of a strategic LivePerson voice engagement are:

- Lift in conversions
- Increased Average Order Value (AOV)
- Decreased Average Call Handle Time (AHT)
- Increased Customer Satisfaction (CSAT)
- Increased Brand Loyalty and Net Promoter Score
- Increased Customer Lifetime Value

Click to Call is much more effective than a Toll Free number because it can be offered proactively to appropriate customers who exhibit targeted behaviors, routed directly to specific agent skills based on the customer profile, provide customer with a sense of immediacy and real time engagement while continuing their website experience, and provide the agent with details of the customers web session to assist with the sale or service more effectively.

### When to use Voice?

Reach out proactively to engage prospects who abandon orders or customers who indicate intention to cancel services to **retain and convert** more business.

Engage customers making purchase decisions for complex products and services by routing their calls to the **right skilled voice sales representatives** to assist them **at the right time to convert**, while seamlessly continuing their online experience with the guidance of your voice representative.

Establish immediate **brand loyalty** with new high value customers. Proactively engage them through voice to assist with account set up or servicing needs to ensure customer longevity, while using the opportunity to expand **the use of account features and services**.

Use customer session data during click to call conversations to increase efficiency in call handling, **improve customer satisfaction** with the connected experience across channels, and provide valuable insight to enable cross-selling and increased AOV.

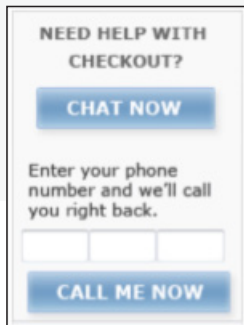
Offer live voice engagement as a white glove service to high value customers, based on your **agent skills and availability**, and prioritize those callers through behind the scenes routing for premium service.

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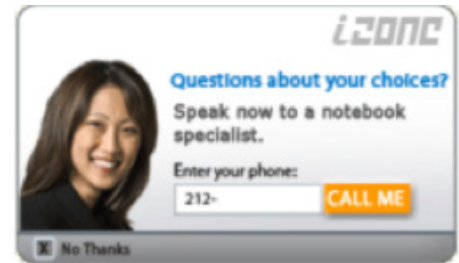
## User Experience

A proactive click-to-call invitation is sent to people who exhibit target behavior matching your business rules, identifying them as a hot lead.

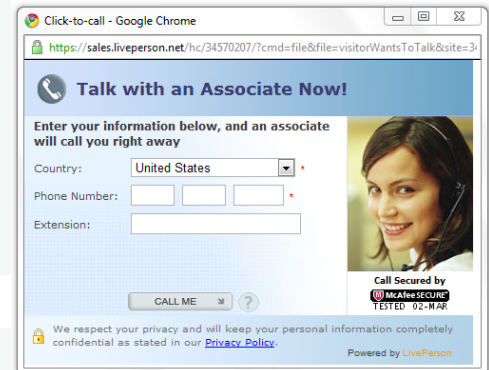
Click to call may also be offered as a button on a webpage, and the phone number entry may be directly on the invite or the page.



- 1 A visitor on the website matches rules or behavior patterns that trigger an invitation for engagement, launching a Click to Call invite (or a reactive button is available on the page).
- 2 Visitor clicks on the proactive invitation or reactive click to call button and opens the GUI. A pre-call form may be used here to collect additional data from the caller (presented to the agent as custom variables).
- 3 Visitor enters her phone number and clicks Call Me to launch an immediate phone call. This may be done directly from a reactive button on the page as well.

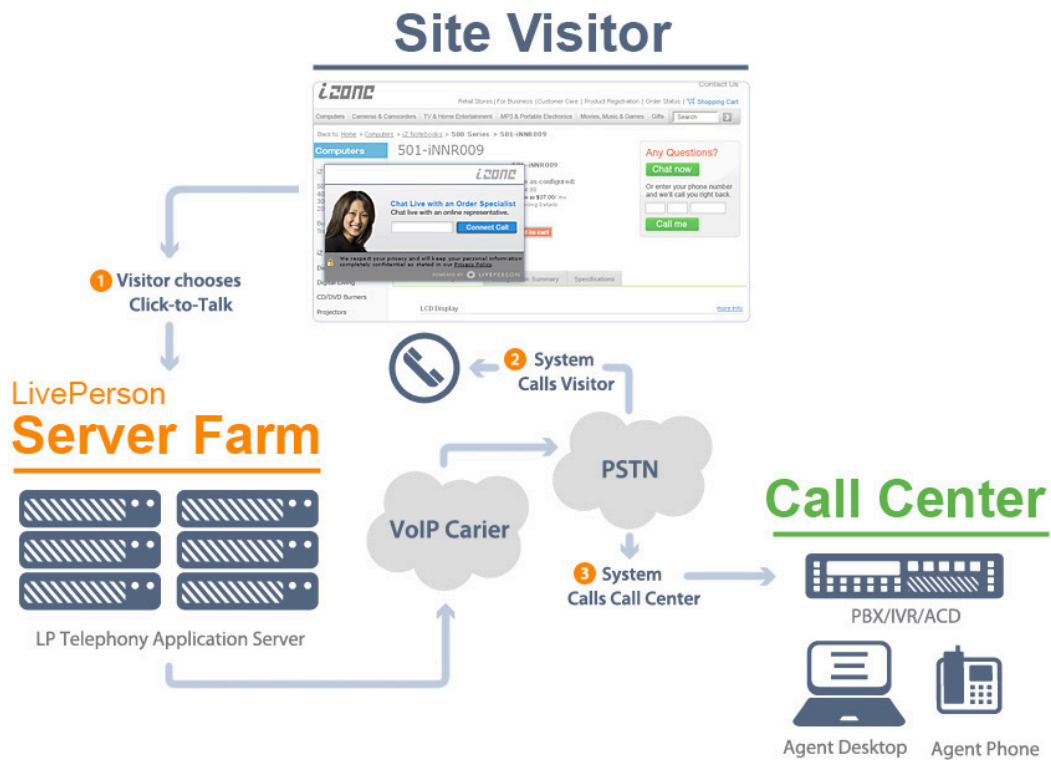


The Call User Interface is customizable with your branding, languages, and images. The visitor country selection can be set to a default and/or hidden on the GUI if end user call back is only available in one country, and the call may be launched directly from the invite or web page in a single step deployment.



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## Standard Call Flow



- 1 A proactive voice** invitation is triggered by a visitor who exhibits online behavior targeted by your business rules. The visitor accepts the invitation by entering their phone number and clicking Call Me.
- LivePerson's servers immediately dial the visitor's phone through a VoIP gateway to the PSTN and her phone rings.
- The call center receives the phone call as a standard inbound call\*, with the visitor on the line. The destination number to which the calls are routed is based on the profile and behavior of the visitor receiving the invitation. The first available agent assigned to that skill will be alerted to answer the inbound call. \*Delivery over VoIP directly to the LivePerson Agent Console with headset is also available.

This call flow emulates the experience of a customer calling the contact center directly, so that there are no process changes or training required to start handling these inbound calls from the web. Delivering calls with the customer already on the line prevents any additional call handle times associated with outbound calling.

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## Agent Experience and Optional Features

In a standard deployment, an agent receives a call from a click to call button or proactive voice invitation as any other inbound phone call, with the caller ID of the customer presented through the phone display.

### NOTIFY CALL

Agents may use the operator console to view additional information about the caller, including the page they are visiting and their site navigation history, during the conversation.

After answering the incoming call on their telephone, the agent clicks the Notify button on the console and enters the last 4 digits of the caller's phone number seen in the caller ID (ANI). Alternatively, the Agent can select the call from the list and right click to notify the call. This notification carries both the operator and call data, allowing the LivePerson servers to match the phone call with the operator and the visitor's web session. Once matched, the agent can view the visitor's web session data, initiate co-browse, and use the operator survey functionality to disposition the call. Notify functionality is used for real time data collaboration, more robust reporting, and operator surveys.

In a Softphone deployment, where the call is delivered via VoIP directly to the agent console (answered via headset), the web variable data is automatically present with the call, as both are passed in the IP channel communications. There is no need to match the PSTN phone call record with the web session ID in order to pair the data with the caller. Softphone deployments are typically not as practical for large scale deployment in enterprise contact centers where multiple applications and enterprise phone systems with complex skill routing is already in place.

### INTEGRATION OPTIONS

Seamless delivery of customer data is available through LivePerson Visit APIs and 3rd party notification plug ins, directly to existing call center CRMs. This allows agents to work within a single CRM or point of sale database and still benefit from LivePerson's web data intelligence. Agent availability information can be delivered to LivePerson servers using APIs as well, eliminating the need for call center agents to use the LivePerson Agent Console. Please visit the LivePerson developer community for more details, or contact your program manager: <http://community.liveperson.com/community/developers>

### OPERATOR SURVEYS

Agents may be presented with a customized post-call survey to collect feedback or disposition of the call, including total sale amount, order ID, etc. This enables the offline information to be tracked when a transaction or process is completed over the phone and included in LivePerson reports.

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## Call Escalation from Chat

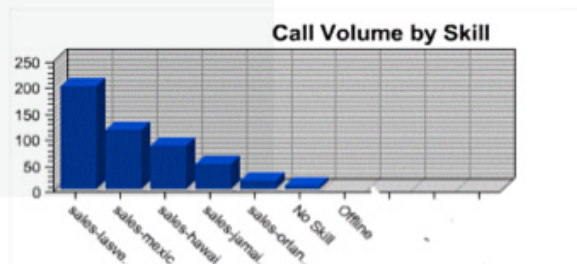
A chat agent may initiate a call from the Operator Console establishing a connection between the customer and their own phone should they need to escalate a chat conversation to voice. This allows for continuity of session data sharing and reporting, as well as enabling a direct voice connection without exposing the agent's telephone number to visitors. Detailed reporting on chats escalated to calls allows for analysis of chat performance and business rules in order to optimize the performance of each channel.

## Reports

LivePerson Call Reporting includes a variety of detailed call record information, engagement monitoring and conversion tracking. Summary reports measure success by segment, invite, skill, or agent. KPIs will be discussed during the implementation design to ensure the appropriate report targets are set up to track to your needs.

- Call Detail Records (CDR)
  - Date, Time, Duration, Called Number,
  - Destination Number, Skill Name, Operator Name
- Conversion reports in summaries & detail drill down views
  - By agent
  - By skill
  - By approach type
  - Order details
- Funnel Reports with drill down details
  - By Agent
  - By skill
  - By approach type
  - By button or invite
  - By channel
- User defined reports based on custom variable targets

### Sample Report Graphs:



### Funnel Reports

Number of visitors to the site

Percentage of visitors who match one or more target visitor profiles to qualify as Hot Lead

Percentage of Hot Leads shown an Invitation to call

Percentage of Invited leads who accept the invitation to call

Percentage of Calls that become Interactive with a live agent

Percentage of Calls that result in conversions

# LIVEPERSON Proactive Click to Call Overview

## Summary by Channel



## Example Use Cases & Results

Learn how LivePerson customers are successfully applying the voice channel in various industries:

### TRAVEL & HOSPITALITY:

- **Drive Bookings in Popular or High Value Destinations:** Orbitz uses proactive voice invitations in travel packages route calls to Destination Specialists, for popular destinations like Jamaica, Orlando, and Las Vegas. If a person pauses in a top destination section for > 5 minutes or on the view package details page for >=30 seconds they'll receive a voice invite. In this use case, LivePerson customers like Orbitz have found that voice invitations result in higher conversion rates than chat.
- **Engage Luxury Customers:** Target customers likely to stay in deluxe resort properties, based on profile and online behavior. For example, offer proactive voice invitations to "platinum" customers who pause on a luxury resort page for >10 seconds.
- **Save the Reservation:** Engage customers with proactive voice who want to travel over dates which are unavailable for the preferred airline or property. Offer a proactive voice invitation to those customers who meet specific business rules, such as viewing search results with no availability, so that an agent can assist the customer with an alternate itinerary to prevent abandonment/save the reservation.

### FINANCIAL SERVICES:

- **Increase Online Application Submissions:** Whenever a phone confirmation is required to verify the submission of an online application, a proactive voice invite can be used to engage the customer at the time of interest to increase completion rates. One LivePerson customer using proactive voice in mortgage applications has reduced follow up call attempts from 6 to 1, as well as shortened the time to complete customer on-boarding.

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- **Reduce Application Abandonment:** Proactive voice invitations are offered to target visitor segments who exhibit abandonment behaviors in online lending / credit applications, rate calculators and comparisons. Click to Call provides a lift in conversions, and opportunity for engaging customers in other lending products to increase wallet share.
- **Improve Business Customer Acquisition:** Proactive click to call can be used to effectively engage business banking and credit customers in the acquisition stage, who are generally less likely to self service online than personal bankers. Business loan and banking customers, who are involved in higher dollar, more complex transactions are best acquired through voice channels, through which agents can assist with approval processes and answer questions related to paperwork, tax implications, etc..
- Proactive invites for click to call engagements are used effectively for acquisition of high value financial services products based on arrival from specific marketing campaigns (landing pages, referring URLs, or offer codes entered) targeting segmented customers to increase the return on the campaign, and based on referring URLs from competitor sites or search key words, as well as based on visitor application abandonment behaviors.
- **Assist with Complex Product & Service Decisions:** Complex financial products and services are best suited to voice conversations for both the nature of the services and the level of trust that must be implicit in the relationship between the consumer and the financial institution. Proactive voice in product comparison and service description areas with very a specific call to action (including assurance of the expertise of the rep on the other end) aids in acquisitions. Consumers will be more likely to invest when they know the organization makes it easy for them to contact a financial advisor, and they can feel empowered to both self serve and reach out for the assistance they need. when they want it.
- **Prevent Cancellations and Product Downgrades:** Proactive invitations to talk with a rep are offered when valuable customers initiate the process to cancel or remove services or account features. The invite can be inserted during an intermediary step of a cancellation form, or speaking with a rep may even be required to cancel services, depending on the value of the account. Proactively engaging with customers provides opportunities to save and retain customers.
- **Conform to Security Guidelines:** In the authenticated space for financial services, click to call allows for full servicing and advice with skilled advisors that is not subject to the restrictions sometimes put on chat conversations in those areas. If PII is problematic or any regulations prohibit authorizations for changes to accounts via chat, click to call provides an ideal alternative for engagement.
- **Increase Cross-Sells:** Use proactive voice invitations within the customer service area to educate customers about companion services or additional products. Existing high value customers who will be in servicing mode are hot leads for growth opportunities, and engaging them by phone with an advisor through click to call provides that opportunity.

## INSURANCE

- **Improve Customer Satisfaction and Loyalty:** Providing click to call for immediate voice contact sets a tone for customer care, strategically building a relationship with customers with a live representative of the organization, important to consumers choosing insurance products.
- **Increase Customer Lifetime Value:** High average lifetime customer value for Insurance products means more incentive to be proactive about engaging with prospects early in the acquisition stage, for a greater potential return.
- **Improve Customer Retention:** Voice invitations are sent when customers make changes to plan coverage details or begin steps indicating possible cancellation to help with retention and keep the value of the account over time, as well as improve customer satisfaction and loyalty. Plan changes discussed with a skilled rep can lead to add on plan features, increasing the value of the account.



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## RETAIL

- **Increase High Value Sales:** Proactive voice invitations are used to successfully engage targeted customers with propensity to purchase high value items (\$>X) with more complex details, or to boost sales of items and services where online ordering is not possible.
- **Promote Customer Loyalty:** For concierge level service, segmenting and targeting repeat high value customers with invitations to call provides a more personalized shopping experience and brand loyalty.
- **Reduce Returns:** Prevent returns and dissatisfied buyers by proactively engaging people who need assistance with detailed sizing or feature descriptions or on items with high return potential, no return policy, and/or costly restocking fees. Multichannel voice & chat invitations are also appropriate for this use case.
- **Improve Buyer Confidence & Satisfaction:** Providing click to call to online buyers promotes a level of service important to many online shoppers that is equal to or more important than price in purchase decisions, particularly on higher priced goods. Knowing that a retailer provides live help increases the perception of service and customer satisfaction with the brand, encouraging online sales even when the live help features are not used.

## TELCO

- **Upsell Bundles:** Click to call can be offered to new customers looking at comprehensive service bundles, (indicating high value potential), or existing customers currently with a single line of service (indicating evaluation of additional services). Proactive engagement through voice or multichannel invitations in this scenario can effectively maximize customer acquisition value and reduce churn.
- **Effective Customer On-boarding:** Proactive engage new customers post-purchase to provide assistance with account registration, online bill pay and auto pay set up, and other processes that will reduce the number of contacts later, improve the time to collect on receivables, and increase customer satisfaction for new customers, increasing the probability that they will remain customers through the initial service term.
- **Cross-sell Business Customers:** Segment existing business customers by features and services to identify attractive targets for additional products. Proactively engage these customers for cross-selling opportunities of complimentary plans and features, hardware upgrades, and other strategic offerings to increase stickiness, customer lifespan and value.
- **Up-sell Business Customers:** Proactively engage business customers with click to call invitations during online servicing opportunities to educate them on complimentary account features, services, and upgrades to increase your footprint of services within the account and the overall value of the business customer account.

## RESULTS & BENCHMARKS

- Increase in Average Order Value (AOV) typically of 10-30%
- Measurable lift in online sales, and higher conversion rates than traditional inbound 800#
- Increased customer satisfaction, retention, and recommendations (= greater customer lifetime value)
- 12% average reduction in AHT for improved efficiency and lower staffing costs
- 1st contact resolution, results in reduction in costs and improved CSAT
- Shorter time to onboard new customers, at higher success rates
- Reduction in cancellations and attrition of existing customers
- Greater insight around the success of individual campaigns, customer segmentation and behaviors, and the ability to optimize that success



# LIVEPERSON Proactive Click to Call Overview

## Guidelines for expected call volumes and best practices for relevant engagement

### RELEVANCY AND CONTROL

Proactive Click to Call provides the ability to engage the right visitors at key moments, to optimize your results and eliminate undesirable calls that do not impact your bottom line.

Eliminate multiple contacts and transfers for 1st contact resolution; intelligence about the customer web session is used to route to the relevant agent skill group from the moment of engagement

Agents can follow a visitor's web session in real time and leverage information from the web session during the voice engagement to better support the visitor and have a conversation that is relevant to the online experience.

### CUSTOMER SATISFACTION – RIGHT METHOD OF ENGAGEMENT

Customers prefer a method of communication that is relevant and effective in resolving their issues. Good service has become more important than price to many customers. Customer loyalty and satisfaction in the context of today's social media and heavy use of customer testimonials and reviews can have major impacts on your business' bottom line.

Most customers prefer voice interactions for complex or high value transactions/ products, or when sensitive personal data is involved. This scenario is common early in the customer lifecycle, during the acquisition and on-boarding process, so it's important to consider click-to-call applications within these stages.

Customers typically prefer chat for qualifying questions in the pre-purchase process related to price, special offers, and product details, as well as for customer service across all stages of the customer lifecycle.

### USER AND AGENT BENEFITS

Customers inherently associate Toll Free numbers with the potential for frustrating IVRs and long wait times. Click to Call provides an immediate connection with a live agent, bypassing IVRs. Priority routing to appropriate skill groups is easy with Click to Call, based on the behavior of the customer and their actions during the session. This provides a better customer experience as well as a more efficient use of call center resources.

Maintain a seamless, connected experience with proactive voice, which keeps your customers online, rather than taking them offline to a less intuitive IVR where they must start the process from scratch to meet their intended objective or, even worse, abandon it. Particularly in the new customer acquisition stage, the immediate contact made through click to call can mean the difference between closing a new account and losing one to your competitor.

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## PLANNING FOR CALL VOLUMES

- 1% of unique site visitors is an average call volume to expect when reactive buttons are provided throughout the site, available at all times. Actual call volume is largely dependent on factors unique to each site, such as availability of other contact channels, usability of the website, complexity of products, perceived service levels, and call to action.
- 15% acceptance/click through rate may be achieved for targeted click to call invites to a well defined hot lead portion of the visitor population.
  - **Example:**
    - 20% of visitors identified as hot leads based on segmentation and behaviors
    - 15% acceptance rate on those invites
    - Total call volume =3% of total visitor population
- Conversion rates increase when using LivePerson's intelligence engine and business rules to effectively engage with the right visitors at the right time, providing much higher lift and ROI, while total call volumes may increase very little.
- Click to Call makes use of existing phone agents who may not be fully utilized, generating leads that convert at a higher rate with very little additional volumes, particularly when invites and buttons are controlled based on agent availability.

## CALL TO ACTION

Regardless of whether click to call is implemented reactively (a button) or proactively (an invitation), the call to action can have a significant impact on acceptance rates and the resulting conversions:

Instead of a call to action such as, "Click to talk", or "Let us call you now", verbiage should be relevant to the person's needs at that point in their engagement on the website, for example:

"Need help choosing the right internet service plan for your business? Click to talk with us now to learn more about your options."

The look and feel of the invitation can also impact acceptance rates significantly. It's important to keep consistent with your style and branding, and avoid invites that look too much like banner or pop up ads for most use cases. A graphic call to action, such as a phone or agent represented on the invite, can be helpful as well, depending on your audience demographics.

There is often a "comfort lift" achieved by offering click to call or chat in a purchase decision path. Customers are more likely to continue with making a selection and purchase on their own knowing that help is a click away should they need it, even if they don't make the call. Having a click to call option available, whether used by a customer or not, can also boost CSAT ratings for the perceived level of customer service provided.

## OPTIMIZING RESULTS

In addition to providing guidance during the design and deployment phase, your LivePerson program manager will provide regular reviews of the reports available to you, and assist in the results analysis to help optimize your deployment to meet your goals.