# 6 WAYS TO WIN
## With Managed Chat

Managed Chat can help Admins in Conversations streamline their messages and manage their Call Center, so they can save time and ensure the best chat experience for their customer.

Before diving into the top five best practices with Managed Chat, let's understand what Managed Chat is in Conversations.

## MANAGED CHAT

Using Managed Chat means internal chats can roll over to a Call Center Agent if an internal Agent cannot answer, if your store is closed, or if the chat comes in past open hours, and more.

Managed Chat is a feature in the backend of Conversations where you can create rules for when and how the call center fields those chats.

Let's jump into a few best practice to ensure you're optimizing Managed Chat at your dealership. We'll cover best practices when:



Already know what you want to focus on? Click the topics above to navigate to that section.

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## CREATE YOUR RULE

To create a policy rule, click on Managed Chat under the Account Administration section. Click **New** under **Managed Chat Policies** to create a new rule.

Creating rules will ensure that the Managed Chat team is ready when you need them, and will help you use Managed Chat as effectively as possible in a way that fits with your dealership. Title your policy and toggle the rule you'd like to apply.

We recommend enabling the following rules:

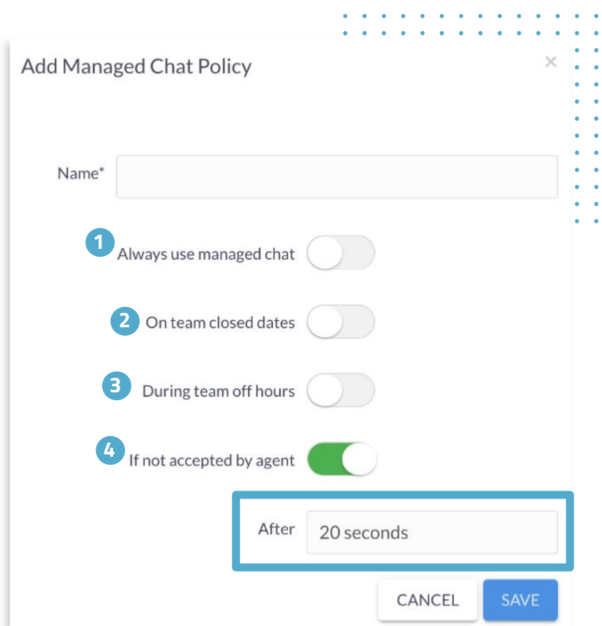
1. **Always Use Managed Chat** – if no one at your dealership will be answering chats
2. **On Team Closed Dates** – when a department will not be available
3. **During Team Off Hours** – in case chats come in after hours
4. **If Not Accepted by Agent** – if an agent cannot respond right away, so the shopper isn't waiting

### SEE IT IN ACTION

If Agents want to be able to answer chats outside of regular business hours, the policy should be:

- ✗ On team closed dates
- ✗ During team off hours
- ✓ If not accepted by an Agent

In this scenario, the call center will only pick up chats that are not answered by the internal team if they are not accepted within the selected time threshold.




It is best practice is to set 20 seconds as a maximum to ensure a better customer experience. If the customer waits longer than 20 seconds, they may exit the chat.

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## APPLY YOUR POLICY

Now that you've created your rule, you can assign which policies apply to which team. Under **Team Policy Assignment** click on the **Policy** box next to the team you'd like to assign the rule to.

A dropdown will appear of all the policies you've created. Simply select the rule you'd like to apply to each team. You can create as many rules as you'd like, but only one can be applied to each team.

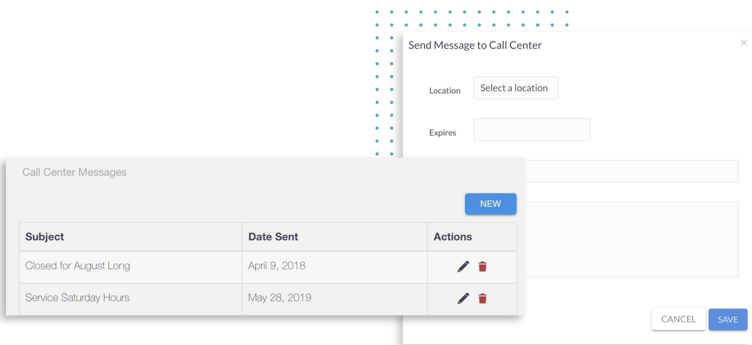
Because different departments might vary in hours or might require a different approach as it pertains to chats, we recommend applying your policies to teams to ensure efficiency and accuracy.

## CREATE MESSAGES FOR YOUR CALL CENTER

In the Call Center Messages section of Managed Chat, you can arm the Call Center Agents with important dealership information. Creating messages for the Call Center allows Call Center Agents to review before answering chats for your dealership if the chat rolls over to them

Consider creating messages for:

- Special Events
- Weather Related Closures
- Weekend Hours




We consider it best practice to:

- Limit the number of messages you create (we recommend drafting 2 - 3 messages)
- Set an expiration date on time sensitive messages
- The subject line should contain a 2-3 word summary and call to action
- Leave the location blank if the same message applies to multiple locations
- Pair a message with a Hotkey so the Call Center can easily access messages

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## SET YOUR HOURS

To get the most out of Managed Chat and your Call Center, make sure you store hours per department are accurately set, so the hours-related policies applied to each team are accurate.

Setting hours is a small task that can impact the efficiency of how Conversations works in alignment with your dealership and Call Center, for the benefit of your shoppers.

To set your hours, go to **Teams** and **Edit Team Settings** under each department. Then, click **Update**. Edit your hours per team to correlate with the On Team Closed Dates and/or During Team Off Hours when applying those policies to the appropriate team.

Consider how setting hours and applying policies can work together. If there is a holiday on a Monday that requires different open hours but not a full closure, ensure this is manually changed in your hours settings and applied to the right policy. These will need to be reset after the holiday.

## USE BOSS MODE

Admins at your dealership have the option to use Boss Mode, allowing admins to take over active chats either from call center agents or agents at your dealership.

Admins can view these chats by clicking on **Active Chats** under **Reporting**. Select **View Details** next to the list of active chats. The chat window of your selected conversation will populate.

This is Boss Mode in action.
Select **Takeover Chat** and **Confirm**.


At this point, the conversation will include the customer, the agent, and you. The agent can stay in the chat or exit, leaving just the admin (you) and the customer to resolve the conversation.

One common problem that Boss Mode can solve is that it is a way to effectively and efficiently continue the conversation with the shopper by taking over from the Call Center within seconds.

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## SHARE FEEDBACK

Share feedback with your PFM or our Support team about your Call Center experience. If you have a specific question or piece of feedback to share, include the following information to your PFM or to Support at support@dealerinspire.com.

- ❏ Date
- ❏ Chat ID
- ❏ Customer
- ❏ Location
- ❏ Concern
- ❏ Screenshot

Feedback is encouraged. Consider submitting feedback if incorrect information is shared from the Call Center, or if concerns arise surrounding Managed Chat efficiencies. Please remember that the Call Center, though helpful and efficient, still leaves room for human error. Feedback helps us coach and improve the Call Center teams to handle chat conversations as effectively as possible.

We can often find solutions pairing Managed Chat messages with Hotkeys to minimize room for error. For more information on how to create Hotkeys and some recommendations to start with, check out this Conversations Hotkey Templates guide.

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**More of a visual learner?** Watch our **Managed Chat and Boss Mode** video below:

Watch

Have questions? Reach out to your PFM,
conversationssupport@dealerinspire.com, or trainers@dealerinspire.com