Live Chat Blunders That Lost the Sale
A White Paper Learning Activity

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“Live Chat Now!” crept across my screen as I shopped online for a new computer. I had selected a specific make and model and was there to spend my money. So, I typed the first of my three questions believing I would get the facts I needed to make a buy right then. But I was wrong. Four live chats later from four different sellers and I still have my old computer.

Is it possible “Live Chat Now” is really an anti-sales tool? And do the companies who offer this capability realize their folks are sending customers away?

Over the years I have worked with numerous technical support departments in various industries. I’ve helped them learn to sound diplomatic, tactful and authoritative while solving customer service issues. I have not, however, provided sales training to any of these folks. And apparently, neither has anyone else.

To be fair, this four-company study is less-than-scientific. But the similarities between the behaviors of the four different representatives are obvious. Slightly different words, but identical sales-defeating tactics. Enough information to create a training activity that Inside Sales and Tech Support Managers can learn from.

I shopped:
1. The Product’s Manufacturer
2. My Favorite Retail & Online Office Supplies Superstore
3. A Technology Sales Company with The Largest Google Ad
4. A Large Mall Store & Online Sales Company Known for Technology and Home Appliances

All four representatives:
• Started by saying “no”, the product I chose did not have the simple capability I needed.
• Had to be prompted to look for accessories to overcome the problem, and then found them within seconds.
• Showed greatest enthusiasm when the chat was ending.
• Avoided asking for the sale, although they used some sales language during the chat.

If you would like to understand what happened so you can help your live chat team, please read the live chat transcripts and answer the questions embedded in each. It is a fun and rewarding activity.

In addition, you are welcome to use this document to teach your own staff. If you would like my answers to the exercise questions, please do not hesitate to reach out to me at rcaras@carastraining.com. I will send them to you by email right away.

If you prefer to skip the activity and just read my recommendations for training and coaching action, please jump to page 6.
FIRST - THE ODYSSEY BEGINS AT THE BRAND'S ONLINE STORE.

Please read Live Chat Transcript 1 and answer the 4 questions about Wilbur’s work. Why didn’t I buy?

Wilbur A: Thanks for contacting XXX Store Chat! My name is Wilbur A, how can I help you today?
Me: I need two USB ports to use at the same time. Can I do this with surface pro3?
Wilbur A: I'd be happy to help you with the Surface Pro 3 questions you have today.
Me: Do you need me to ask my question again?
Wilbur A: No, I do not, sorry about that.
Wilbur A: No, the Surface Pro 3 only comes with 1 usb.
Wilbur A: But we do have options for expanding the usbs with accessories.
Me: So the answer is “yes” with accessories, correct?
Wilbur A: It can also be worded that way, yes.
Me: Oh good. So can you please tell me which accessories I need?
Wilbur A: Yes, I can.
Wilbur A: One moment while I provide you with the correct link.
Wilbur A: Please click here for Surface Pro 3 Docking Station
Me: ok great. thanks. next question. I need to use QuickBooks. Can I do that with surface pro 3?
Wilbur A: Yes, you can.
Me: Great. Followed your link and I see the docking station is the solution for extra usb ports as well as for connecting to a projector. How heavy is the docking station? Is it practical to travel on planes with?
Wilbur A: About a pound and a half. Yes, it is great for traveling.
Me: Reading reviews which suggest it is bulky for traveling. What sort of carrying case is available for docking station?
Wilbur A: One moment please.
Thank you for your patience.
Wilbur A: Unfortunately, I am unable to find any traveling cases for the docking station on our website. But when I travel with mine, I place it in my traveling bag. Fits pretty well for me.
Me: Okay thanks. I'm worried because my travel bag is always filled to capacity now and I was hoping to get more space and lighter load with surface pro 3.
Wilbur A: I understand.
Me: Last question is about the pen. I don't see a pen option with the i5 256gig. Am I missing something?
Wilbur A: Let me take a look for you.
Wilbur A: Yes, it does come with a pen. All of our Surface Pro 3's come with a pen.
Me: Can you please clarify if it is automatically included or an option I must purchase?
Wilbur A: No, it is included with your Pro 3 purchase.
Me: That's great! Thanks for your help. Have a nice day.
Wilbur A: You are very welcome, thank you for your time and patience today. What else can we work on together today?
Me: Nothing more. Thanks again. Goodbye.
Wilbur A: Thanks again for chatting with us at the Microsoft Store, we appreciate your business!

Question 1
How did Wilbur harm his authority and credibility?

Question 2
Why did he say “no” when he meant “yes”?

Question 3
What could Wilbur have said or done to be more proactive instead of forcing his buyer to know the right questions to ask?

Question 4
Why didn’t I buy from this site?
NEXT I CALLED MY PREFERRED SUPPLIER. I decided to ask the same questions and see how the answers compared.

Please read Live Chat Transcript 2 and answer the 4 questions about Raj’s work. Why didn’t I buy?

**Question 1**
Again we see an agent saying “no” to the USB question. What training or coaching will help these folks answer positively and look for creative solutions?

**Question 2**
How many times did the customer (me) have to prompt the rep (Raj) to get past his “no” mentality?

**Question 3**
When I said “I’m all set”, what could Raj have said to close a sale?

**Question 4**
Why didn’t I buy from this site?
THIRD, I DID A GOOGLE SEARCH AND SELECTED A TECHNOLOGY ONLINE SALES COMPANY. Maybe they could break the tie and point me in the right direction. Certainly this person would be an expert, right?

Please read Live Chat Transcript 3 and answer the 4 questions about Lance's work. Why didn’t I buy?

| Lance: | Hello Ronna, my name is Lance McKane, I understand you are looking for 2 USB ports for a Surface Pro 3? |
| Me: | Yes. |
| Lance: | Thank you for waiting, unfortunately we cannot modify an item in any way. This tablet only comes with one USB slot. |
| Me: | Okay. Is there an accessory or anything that might help solve my problem? |
| Lance: | You could try getting an adaptor for it. |
| Me: | Do you sell anything that could work for me? |
| Me: | Looks good. Can’t see the price though. Does that say it’s unavailable on your site? |
| Lance: | It is available and the price is $9.99. |
| Me: | Ok. Excellent! A couple more questions. Does the pen come with the device or do I need to buy it separately? |
| Lance: | It comes with an S pen, yes. I’m sorry it comes with the pen. |
| Me: | Thank you. Can you please tell me if it can be hooked up to a projector for PowerPoint presentations? |
| Lance: | Is there anything else I can assist you with? Let me check please wait. ...[long wait of almost 2 minutes]|
| Me: | Do you have a suggestion or link? |
| Lance: | [no response] |
| Me: | Sounds like maybe this product is not right for my needs. Thanks for the help. |
| Lance: | Okay then. Have a great day, and thanks for providing us with the opportunity to assist you today! |
| System: | Lance McKane has left the chatroom. |

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**Question 1**

What did Lance do that made me feel he did not want to help me?

**Question 2**

Do you think his employer wants him to send buyers “off-site” before a sale has occurred?

**Question 3**

What impact does the final statement have “Thanks for providing us with the opportunity to assist you today?”

**Question 4**

Why didn’t I buy from this site?
Last, I chose the biggest retailer whose online support is usually quite good. I just want to buy a computer! But, I still cannot resist seeing how a fourth representative handles my inquiry.

Please read Live Chat Transcript 4 and answer the 4 questions about Pat’s work. What will happen next?

| Pat: | Welcome to XXXX chat support. My name is Pat and how may I assist you today? |
| Me: | Hi I’m interested in Surface Pro 3 i5 256 GB. I need 2 USB ports. Not sure if this can accommodate. |
| Pat: | I would be happy to check if the Surface Pro 3 comes with 2 USB ports. May I take one or two minutes to check on that? |
| Me: | yes, thank you. |
| Pat: | Thank you for your patience. The Surface Pro 3 only comes with one USB 3.0 port. |
| Me: | Is there an attachment or anything available to meet my needs? |
| Pat: | We do offer USB hubs that will allow you to create more ports on the device. If you would like, I can provide you with a link to the USB hubs we currently offer. |
| Me: | yes please. I also have a few more questions, |
| Pat: | Here is the link: CLICK HERE |
| Me: | Nice several options. Ok, I will pick one. Next question, I need to use QuickBooks. Can it work on the surface pro? |
| Pat: | Yes, the Quickbooks program can run on the Surface Pro 3. |
| Me: | Yay! Thanks. Okay. I also need to plug into a projector to show powerpoint. Does it do that? |
| Pat: | The device does come with a mini display port that will allow you to plug into a projector. |
| Me: | Great! No adapter needed? |
| Pat: | It may require require an adapter. |
| Me: | Ok, so I was thinking of ordering this all online right now. It sounds like I need to do more homework to figure out what’s needed. Does that sound right to you? |
| Pat: | I would agree that there is more to look into, especially if you are wanting to connect the device to a projector. |
| Me: | Ok thank you. have a great day. oh, one more question, do I need to buy the pen separately or is it included? |
| Pat: | It’s included. |
| Me: | thanks very much. take care. |
| Pat: | You’re welcome and thank you for contacting XXXX. We appreciate your chat. |

Question 1
Is it possible Pat does not know s/he has a sales job?

Question 2
What actions could Pat have taken to help me thoroughly?

Question 3
What buying signals did Pat miss or ignore?

Question 4
Why didn’t I buy from this site?
Companies wise enough to engage their online shoppers with “Live Chat Now” need to set standards for these interactions. Pre-written statements, a little sales training, and some practice will improve your consumer experience and sales revenue forever.

I would like my four sample companies to set these standards right away:

1. **Be a problem solver.** If someone says, “I need two USB ports,” your job is to help her get two USB ports. Use internal and external resources to consult and resolve the concern. Don’t guess. “It may require an adapter,” is not an acceptable response to the question, “Does it need an adapter?”

2. **Get “no” out of your vocabulary and use positive words instead.** Don’t explain why it cannot be done, or that you don’t customize products. Find something that will work and suggest it.

3. **Ask about the application.** If you don’t know why someone is asking a question, or do not understand what she or he means, do not continue providing generic answers you are unsure of. Instead, use a salesperson’s greatest trick, “Ask Questions”. Begin with, “So I can help you quickly, can you please tell me about your application?” Or, “I haven’t seen anyone use it this way. Can you please help me understand what you are trying to do?”

4. **As you find items the customer wants, start building the order.** You can place the Surface Pro 3 i5 with 256MB into a cart right away. Then add the USB adapter you recommended, and the projector adapter, and Quick Books, and PowerPoint so it’s easy for the buyer to check out. If some of these items must be purchased from another supplier, provide a link your customer can jump to after they’ve bought what they can from you.

5. **“I have those products set aside for you, would you like me to place them into your shopping cart?”** is an easy way to ask for the sale and provide great customer service at the same time.

6. **In sales situations, do not be handling multiple chats concurrently.** When you realize you have someone trying to buy today, give that person your full attention and make the sale.

During the typing of this white paper, I have had to plug in an alternate mouse because the built-in mouse in my old PC froze. I used my one remaining USB port because the second port is dead. The letters “i”, “s”, “t”, “o”, “n”, “e” and “d” are worn off my keyboard and I can’t stop thinking it’s a message from the beyond that I need to mount a defense for.

It is time to buy a new PC but I am on the road in a hotel without a car. I must continue to make-do until next weekend when I start my search all over again.

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**About the Author**

Ronna Caras, President, Caras Training is a sought after speaker, author and curriculum developer with more than 20 years experience bringing skill development programs to life. She is known for innovative, real word solutions to employee development challenges that bring measurable results. She can be reached at rcaras@carastraining.com or 508-527-9599.