

4 KEYS TO MOVING CHAT TO CLOSURE

CHECK FOR UNDERSTANDING EARLY ON AND AS OFTEN AS IT TAKES

Don't assume you understand what the customer is saying. Ask the customer what they mean. *"You want to de-activate a license because an employee is on medical leave, right?"*

USE SCREEN RECORDINGS AND SCREENSHOTS

Whenever you can, use links, screenshots, or screen recordings to guide customers. - (It's a huge timesaver!)

TYPE A CLEAR CLOSING STATEMENT

After you've answered the customer questions or pointed them in the right direction, guide them to closure. *"I'm so happy I could help you with this, Lauren! Do you have any other questions or concerns I can help you with before we disconnect?"*

TELL CUSTOMERS TO DISCONNECT

"Great, Lauren! Have a fantastic afternoon. Please hit the 'X' or 'Disconnect' at the top right corner of your screen. Thanks again!"