

Best practices

For Merchant HQ

Reach the fullest potential with Virtual Shopping.

Customizing the Virtual Shopping Experience

How best to display Virtual Shopping on your site, including factoring in your team's availability and how to deal with customer service-based inquiries.

Embedding Virtual Shopping into day-to-day operations

Tips on what to consider to ensure your team seamlessly integrates Virtual Shopping into their daily work without jeopardizing the in-store experience.

Marketing guide

A bank of examples showing how to educate shoppers on Virtual Shopping and integrate it effectively into your messaging to augment your overall offering.

Customizing the Virtual Shopping Experience

In Dashboard, you'll be able to configure many aspects of the Virtual Shopping experience to give it the right look and feel for your brand. This includes:

- Operating hours and whether or not Virtual Shopping is displayed when stores are closed and no experts are available.
- Onboard and offboard stores.
- Customer-facing text.
- Color and visual assets for On-site Chat as it appears on your site.
- Supported languages.
- Photo and video sharing between shoppers and experts.
- Automated greetings for experts to start chats quickly and in a friendly way.
- Pre-populated messages to FAQs.
- Duration of the countdown for experts to accept incoming chats.
- Integrate employee IDs.
- Lead queue, i.e. the no. messages from shoppers left when no experts are available.
- The maximum number of chats your experts can have active simultaneously.
- Departments for specialized experts.
- Options for customer service integration.

E-Commerce Readiness

How to optimize and customize your On-site chat experience to cater to new and existing shoppers.

Site Exposure

Where: for higher engagement and quality conversations, On-site Chat should appear on all relevant sales pages and follow the shopper throughout their entire shopping journey using our allow/deny URL list.

How: customize the look, sound, and feel of On-site chat from the color of the widget to customer-facing text to best represent your brand to drive success for your use case.

When: you will launch with a limited display to allow experts to get comfortable with connecting with shoppers in real time - depending on resource level, site traffic, and desired UX, you should plan to increase visibility to service more shoppers.

Manage Display: Where is On-site Chat shown on your site?

Manage Display: Where is On-site Chat shown on your site.

On the Dashboard, Manage Display is where you can set where Virtual Shopping is shown on your website.

For higher engagement and quality conversations, we recommend displaying Virtual Shopping on all:

- Product category pages
- Product detail pages
- All other sales-related pages

To avoid shoppers asking your product expert customer service questions, we recommend not displaying Virtual Shopping on:

- Customer Service pages

Manage Display: When should On-site Chat be displayed?

As well as on which pages, you can decide at which times On-site Chat is displayed:

24/7 display (Highest volume)

The widget will be visible at all times on your site. Outside of store hours or when the Product Experts are busy, customers can leave a message for experts to answer the next time they are online. Review the Left Message user experience here.

Available only display (Most limited volume)

The widget will only be visible on your site when Product Experts are marked as available in the app. Outside of store hours or when your Product Experts are busy, customers will not see the widget.

Within store hours display (Medium volume)

The widget will only be visible on your site within store hours. When the Product Experts are busy, customers can leave a message for experts to answer the next time they are online. Outside of store hours, customers will not see the widget.

Customize text for On-site Chat.

Most customer-facing copy within the Virtual Shopping widget is customizable. Klarna will provide some default copy, as reflected in the Editable Strings tab of the Settings Document that can be edited based on your needs.

Clienteling

Stay in touch by text and email.

Cultivate lasting relationships with online customers to keep them coming back to your brand - both online and in-store.

Shoppers have the ability to stay connected through email, SMS, or WhatsApp (depending on where

you're based) – a great streamlined clienteling feature to send important fact sheets and drive sales!

Encourage store teams to invite shoppers to join their personal Contacts after any positive chat experiences to keep in touch, keep sharing recommendations, and keep them coming back long after their first chat experience.

Departments

Utilize Departments when you need to ensure that shoppers are always routed to the right team of specialists. You can assign Store App users to the correct department all from within the Dashboard.

Customer Service Inquiries

You can seamlessly redirect shoppers into your preferred channel or existing Customer Service tool **before** or **during** a chat with a warm handover to ensure more thoughtful, sales-focused conversations.

Before a chat...

Give shoppers the option to select the nature of their query before they start a chat by using a Need Selector to be redirected to another page on your website, or to another tool. Note: this exists prior to/outside of Departments.

During a chat...

If a shopper has already started a chat but would be better served by Customer Service, team members from any department can redirect during a chat. This means you can instantly switch tools, or give your shopper the option to speak with Customer Service either immediately or with the click of a button. We are also able to share the conversation transcript with the Customer Service agent with a few additional events.

**Virtual Shopping offers a number of examples of out-the-box listener scripts for Customer Service tools or you can create your own.

Many of our merchant partners also use advanced events to customize the chat menu within the On-site Chat so it can sit alongside Customer Service tools. This is a useful way to ensure a good shopper experience by diverting support queries away from Virtual Shopping to a Customer Service tool before entering a chat.

Embedding Virtual Shopping into day-to-day operations

How to embed Virtual Shopping into existing day-to-day tasks without jeopardizing the in-store experience.

Here are a couple of factors to consider when it comes to how best to implement Virtual Shopping into your teams' daily rhythms.

Store Selection: Select up to 10-15 stores to go live per region based on coverage, management, lower footfall, and high adaptability.

Expert Selection: Identify a small team for your go-live who will set the standard and establish your unique brand-specific ways of working.

In-Store/Devices: Consider dedicated chatting hubs and as many company-owned work-indicated devices across the store floor.

Manager Prep: Virtual Shopping should be incorporated into the stores' daily communication (using a daily brief sheet, for example). It should be added to team rotas and the results should be shared. Encourage your management team to pull data from the dashboard and share the wins!

Expert Training: Once digital profiles are created in the Store App, your product experts should be guided to only 'Go Available' and connect live with customers if they are either scheduled on the rota to do so or can give their full attention whilst on the shop floor.

Saved Replies: This feature sits within the app and is designed to save your in-store team time and improve efficiency. Store managers are responsible for encouraging teams to share frequently asked questions among their teams and update as and when in the app.

Marketing guide

How to educate your customers and incorporate Virtual Shopping into your messaging.

Educating shoppers about Virtual Shopping

Increasing online awareness of Virtual Shopping will ensure customers understand the value proposition and service available to them, thus improving the quality of chats initiated.

Check out these examples from Virtual Shopping retailers for inspiration.

Landing Pages

Expand on your value proposition.



HERE'S HOW IT WORKS



CLICK

Select the chat icon at the bottom right corner of our site (desktop and mobile) to instantly connect with a stylist.



CHAT

Start a live conversation with your dedicated personal shopper.



VIRTUAL STYLING

Receive answers and recommendations via the chat, including photos and/or video—just like you're in store!



PURCHASE

Proceed to checkout or save your details for a future purchase.

SHOP NEW ARRIVALS

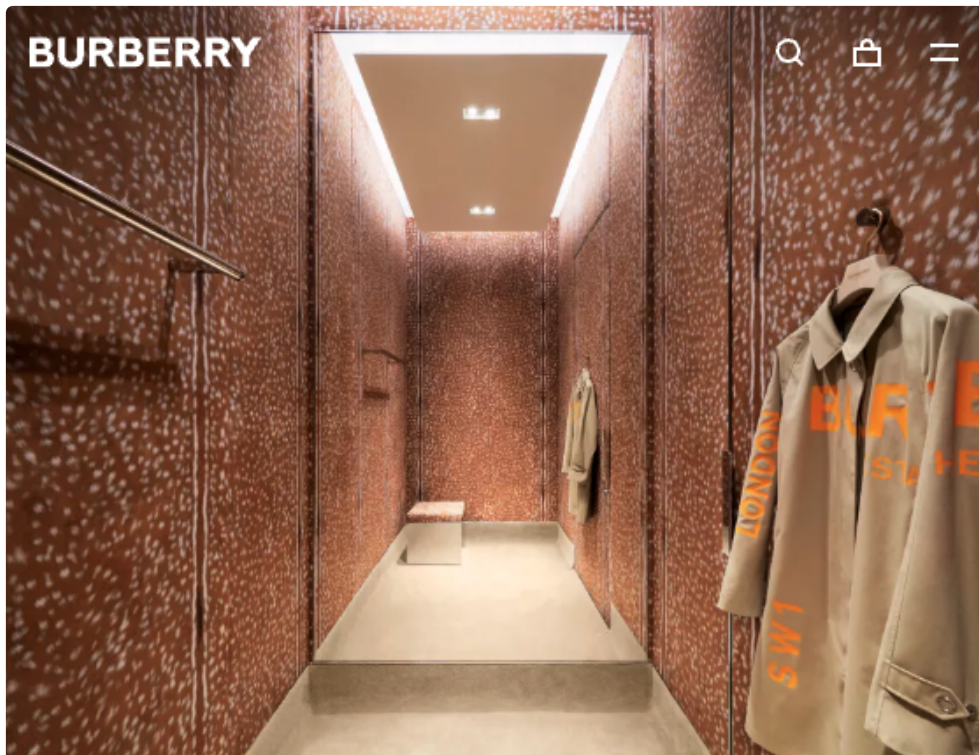


Design experts on call

Our design pros work in our stores and are on call to help you with advice, recommendations, and any questions you have. Connect with them instantly via a live chat that can include photos and video. Think of them like a personal shopper, interior designer, and furniture expert all in one. All DWR Design Services are available to you at no charge, with no obligation to make a purchase.

Banners

Increase entry points to starting a chat and engaging with an expert.



INSTANT MESSAGE STYLING SERVICE

For instant fit, gifting and styling advice from one of our expert Sales Associates, connect to our stores by instant message from wherever you are.

Have a question?

Reach us at

questions@untuckit.com

-or-

+1 (888) 992-3102

Mon-Fri 10am-5pm ET

-or-

CHAT WITH US

Please note that store associates are only available during operating hours.

Social

Harness your online following.

[Size? Instagram](#)

[Untuckit Instagram](#)

Email

Tap into your loyal customer network.

Une expérience shopping sur mesure

[Version en ligne](#)

LONGCHAMP

PARIS

[FEMME](#)

[HOMME](#)

[CADEAUX](#)

[MAISON LONGCHAMP](#)



La Maison Longchamp vous présente un nouveau service en ligne qui vous permettra de bénéficier d'une assistance en temps réel, de conseils personnalisés et d'inspirations pour répondre à tous vos besoins.

Découvrez votre expérience shopping très personnelle en ligne !

[EN SAVOIR PLUS](#)



Point
de vente



Livraison
en boutique



Paiement
sécurisé



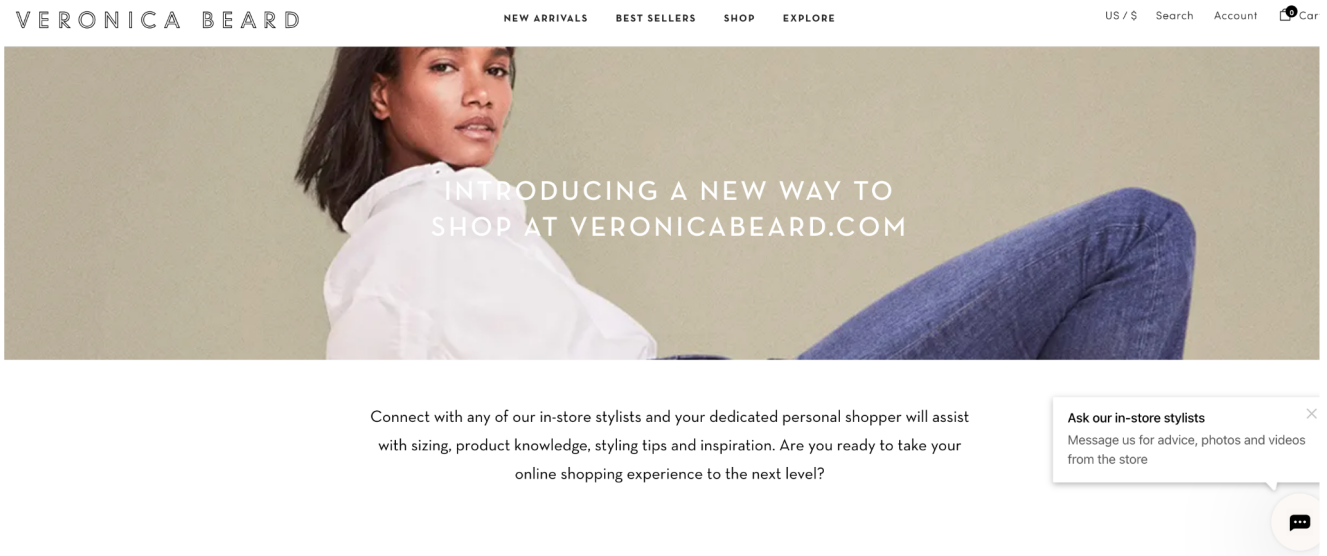
Retour &
échange facile

Landing pages

A dedicated landing page is a great way to expand on the value proposition of Virtual Shopping and address FAQs. It also serves as a great place to direct customers to via marketing channels.

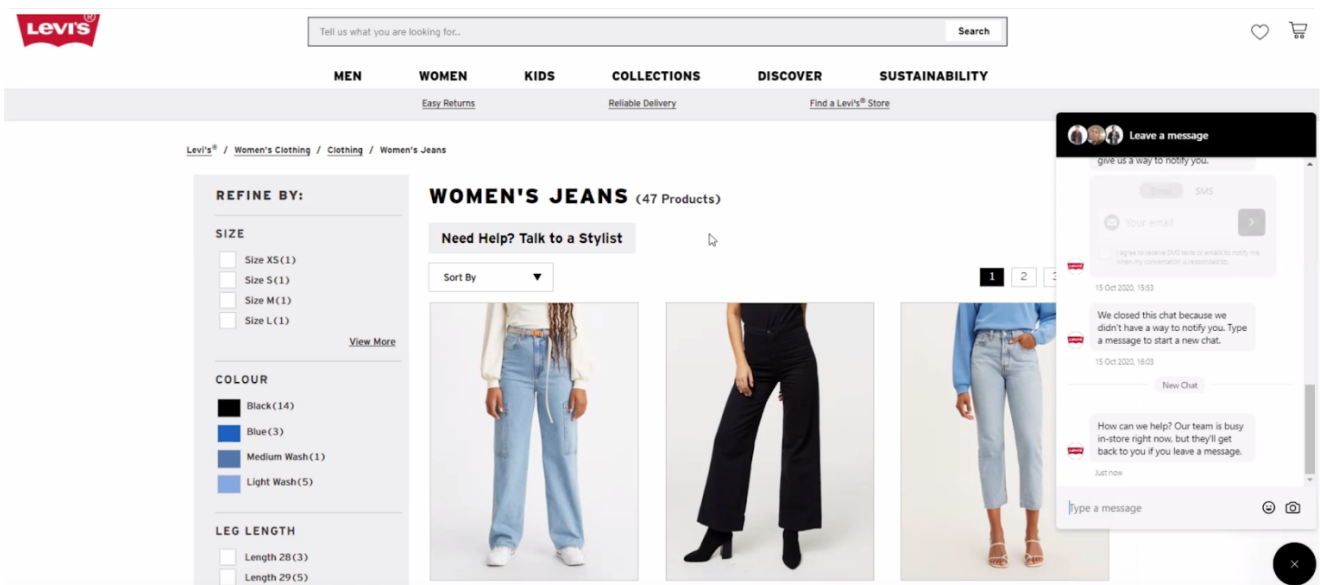
A seamless breakdown of how the Virtual Shopping chat widget works, guarantees a more interactive in-chat experience.

<https://drive.google.com/file/d/1uizSf8fJe3hk3q2lAPBLpkgbGV7Pf-Q/edit>



Site banners

Create additional entry points to Virtual Shopping by leveraging site banners on key URLs to increase customer engagement.



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-or-

+1 (888) 992-3102

Mon-Fri 10am-5pm ET

-or-

CHAT WITH US

Please note that store associates are only available during operating hours.

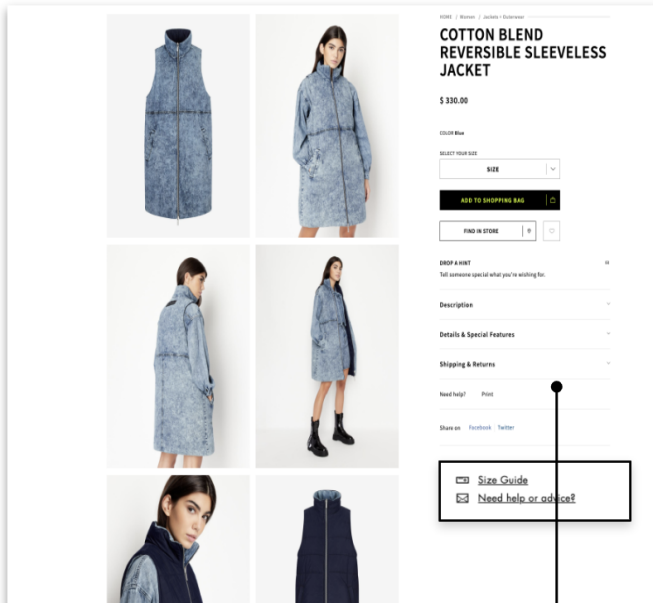
Call to action buttons

 [Size Guide](#)

 [Need help or advice?](#)

Through a simple event listener, a site banner can trigger the widget to expand. More information is included in our [documentation](#).

Product Page Info.



Minimize return rates by guiding shoppers to virtual assistance with size & fit!

Smaller callout, right next to the Size Guide section will draw attention to the virtual assistance and maximize the chat when clicked.

The shopper will then click on the Size & Fit need selector and follow the flow.

Holiday Landing Pages



Optimize the gift giving season with VS. Promote hands-on assistance experience while shopping online.

Call to action button, e.g., **"Need help ordering your gift in the right size?"**

Create a running banner at the top of the page promoting virtual shopping and advice for gift giving!

Social Media

Harness the power of your online following to promote Virtual Shopping. Utilize the swipe-up Instagram story feature to bring customers directly to your site or dedicate a post to introduce the experience.

https://drive.google.com/file/d/1o_QroWQfQaPbgMUMMF-cPBI2Wj5R5wIM/edit

<https://drive.google.com/file/d/1s6yTKyHPp0n28oVEhNXBlmX5Ayt-GTib/edit>



hypedc • Follow



hypedc HYPE AT HOME: Introducing our Hype DC Product Experts, here to serve you online from the comfort of your own home. Pictured is Chloe, our Product Expert from Hype DC QV Melbourne. Chloe is passionate about all things sneakers, particularly her favourite brands Nike and Salomon, and providing helpful advice and suggestions to our online customers in real time.

Our Hype DC Product Experts are here to help. Visit our online store now for more information. [#HypeAtHome](#)

11w



buffy_013 @crunchy.peanutbutter



551 likes

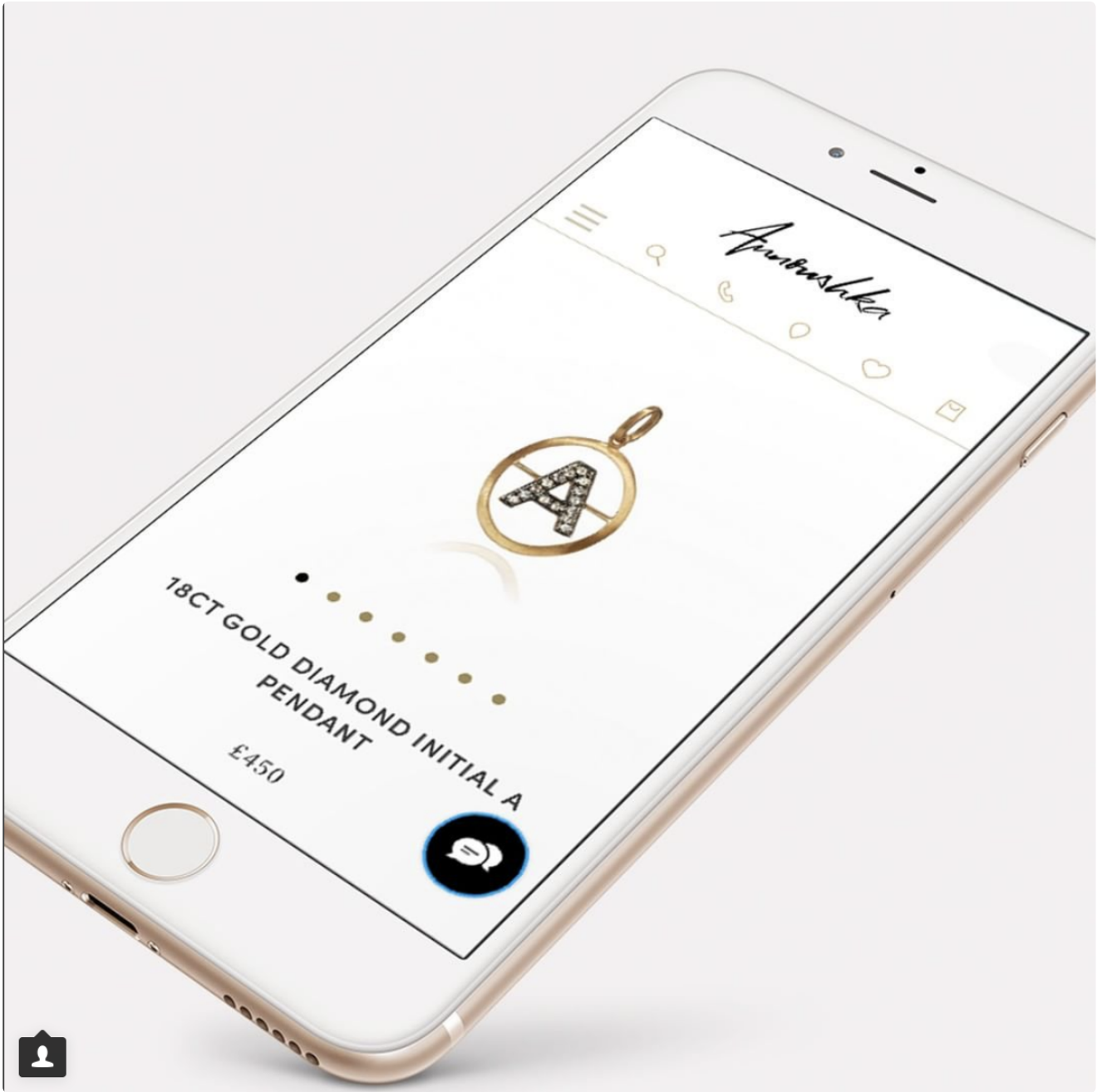
JULY 16

Add a comment...

Post

Graphical user interface, application

Description automatically generated





sizeofficial




size? **EXPERTS**

The size? Experts are available in your local size? stores to offer real time product info, stock availability, sizing guidance & styling advice whilst you shop online.

Heidi
size? Meadowhall



Liked by adamlevene and 971 others

sizeofficial Sizing advice? Stock question? Look for the size? Experts icon on all Nike product to connect to our team of over 50 Experts across 14 stores in the UK & France. Find out more at the link in our bio.  - #SizeHQ

A picture containing man, counter, food, display

Description automatically generated

Email marketing

Incorporate Virtual Shopping into your email marketing calendar to further tap into your loyal customer network.

Une expérience shopping sur mesure

[Version en ligne](#)

LONGCHAMP

PARIS

[FEMME](#)

[HOMME](#)

[CADEAUX](#)

[MAISON LONGCHAMP](#)



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Découvrez votre expérience shopping très personnelle en ligne !

[EN SAVOIR PLUS](#)



Point
de vente



Livraison
en boutique



Paiement
sécurisé



Retour &
échange facile

Further examples

Landing Pages & Banners

Dyson

Burberry

Annoushka Jewellery

Longchamp

Herman Miller

Three

Jonathan Adler

Social Media

Huntsman

Ralph Lauren

JD Sports Video

Size Official

For Store Managers

Setting up your store team for success

Tips for introducing Virtual Shopping to your team and your ways of working.

Getting the most from the Dashboard

An overview of all the information you'll find in the Dashboard (and why you should be taking a look every day!).

What makes a good chat?

We've learned a thing or two from all of our merchant partners about the perfect Virtual Shopping chat experience. Check out our top tips.

Incentivizing your team

Our top tried-and-tested methods for driving Virtual Shopping adoption and performance.

Setting up your store team for success

While most of the heavy lifting training falls on product experts, nothing can get done without the Managers who have the task of scheduling, monitoring performance, and motivating the experts.

Onboarding and engagement.

Make Virtual Shopping business as usual. Identify a dedicated team of top-performing product experts and roster based on resource level, foot traffic for physical stores, peak hours, and site traffic.

Performance management.

Maintain and enhance store results. Regularly check performance using your Virtual Shopping dashboard to see data, real-time analytics, and chat transcripts.

Motivation.

Recognize your team's success. Include VS in existing goals, recurring incentives, and share ongoing success stories.

Let's look at some top tips and recommendations to help your team get the most out of Virtual Shopping...

Team setup and rhythm.

Each brand is different; many brands have scheduled hours for their product experts, while others allow product experts to make their own schedule, and go available when they have free time in-between in-store shoppers.

Either way, setting experts up for success each day, is crucial in keeping them focused on store goals. Using the daily floor planner to ensure that experts are scheduled to be available on the Store App, will allow stores to consistently connect with customers, without distraction from additional shopfloor tasking or zoning.

Getting the most from the Dashboard

Using the Dashboard

The Dashboard is your one-stop shop for managing performance and the virtual shopping experience.

You can:

- Monitor analytics.
- Track KPIs, expert usage, and performance trends.
- Export chat transcripts.
- Manage your team and their Store App accounts.
- Approve pending team members, and deactivate inactive experts.
- Manage your stores.
- Update, add, and change stores and store hours.
- Update and amend settings.

Checking the Dashboard daily will ensure you are kept up to speed with your team's progress and help you work towards weekly targets.

A few tips for you...

Conversion seems lower than usual? - Check Feature usage.

Claim rate dropped below 80%? - Ensure each team member is scheduled to 'go available' every hour of every day.

Feature Usage dropped? Help drive confidence by hosting a mini morning store brief and showing them how easy it is to shoot content! (It's easier than typing a product description and far more effective...)

What makes a good chat?

Having a well-rounded and thoughtful customer connection can be as simple as reminding your team of 5 key points:

1. **Tone of voice** – Keep it professional, personal, friendly, and engaging.
2. **Probing questions** – Product Experts should lead with probing questions to collect as much information as needed to provide the best guidance and product recommendations possible.
3. **Feature usage** – Product Experts should leverage photos, videos, video-calling, and Product Cards to elevate the Virtual Shopping experience and increase conversions.
4. **Efficient communication** – Keep shoppers in the loop! Let them know if there will be a delay in response.
5. **Clienteling** – Invite shoppers to stay in touch with Contacts! This feature allows experts to follow up with customers even when they are offline. (Note: Contacts will need to be switched on in the Dashboard to allow experts to make use of it in the Store App.)

Start the Chat the right way. First impressions matter!

Before diving into a conversation, Product Experts should always:

Before starting, choose the right profile picture. Go for a simple, well-lit headshot, ideally with a smile, to instantly come across as friendly and approachable!

Check whether they have accepted a live chat or lead. This can be found under the customer's name.

Use Smart Greetings to quickly introduce themselves to each customer before fielding the inquiry.

Tap the Shopping Bag icon in the top right corner. This will show Product Experts exactly what products their customer is browsing.

Striking the right tone in chats.

Set the Tone – Product experts should communicate with online shoppers in the same professional, polite way that they do for that in-store. Conversations should begin in a formal tone and, if customers take a more relaxed tone, experts should follow their lead.

Spelling & Grammar – Ensure that spell check is turned on in devices that Product Experts are using. This will help to minimize spelling and grammatical errors.

Don't rush! – Take your time to compose thoughtful, relevant responses. Experts should take time to fully understand a shopper's inquiry and re-read messages before sending to cultivate a positive chat experience.

Make use of the features available within chats.

Using features is the best way to elevate the Virtual Shopping experience!

Photos, videos, and video calling should be leveraged to bring products to life in ways that cannot be fully represented on the site.

Product Cards are a seamless way of recommending products and guiding shoppers around the website. Research shows that conversion increases by up to 40% when a product card is sent.

Calendar invites can be used to invite a shopper to come shop in-store, increasing foot traffic and your omnichannel customer base.

Contacts: It's not a goodbye, it's a chat you later.

Using our clienteling tool, Contacts, Product Experts can connect with customers offline and continue to build professional relationships. The Contacts invite should be sent out at the end of every good-quality chat. We recommend adding a saved reply explaining the value of Contacts for Product Experts to utilize in tandem with the invite.

Adding customers to Contacts is a simple process. Just tap the Person icon on the top right corner of the chat to initiate the invite. When the invite is sent, the customer is given the option to choose email, SMS, or Whatsapp to stay in touch (depending on which market they're based in).

Incentivizing your team

Our top tried-and-tested methods for driving Virtual Shopping performance.

Cash Rewards and Gift Cards

Earned by associates for achieving sales targets and other incremental goals.

Surprise Rewards

Given to associates unexpectedly for having stellar chats, using best practices, and having high chat acceptance rates.

Product Rewards

Product giveaways for strong performance is an effective way to reward associates. This can be done through means such as scratch cards and raffles.

Team & Company Recognition

Public recognition during team meetings or in company-wide communications lets associates know that their hard work does not go unnoticed.

For Store Teams

The human touch

A reminder of what Virtual Shopping is all about; connecting humans with humans!

Our top 3 Virtual Shopping life hacks...

What's 3 the magic number for in the world of Virtual Shopping? Why are we talking about emotions? Check out our top tips to take your Virtual Shopping game to the next level.

Striking the right tone in your chats

What does the ideal chat look like? How can you get the right tone and voice when it comes to messaging shoppers? Let's take a look...

Getting the most out of the Store App

Tips on just about everything you can do in the Store App to help you create the perfect chat experiences for online shoppers.

Best practice FAQs

What makes a good profile picture? What should you do if a customer is rude to you? Find the answers to these (and more) here.

The human touch

Virtual Shopping is about connecting humans with humans.

Virtual Shopping is all about making a personal connection with your customer. Don't be afraid to mirror your customer's tone of voice, and show your personality when chatting!

Taking the time to tailor your recommendations based on your customers' preferences is key to boosting conversion. The features are designed to help you give the best possible experience to your customers, remember to make the most of them!

For example, when you send photos and videos, we see those customers are 31% more likely to convert and spend 46% more on average!

Here, we want to share some tips to help you get the most out of Virtual Shopping! Let's go

Our top 3 Virtual Shopping Life hacks...

1. **Three and freeze**

Send 3 messages and wait for the customer to respond before then continuing the conversation to avoid overwhelming them with too many messages. Use photos, videos, and product cards to make suggestions, asking the shopper's thoughts on what they are being offered throughout the conversation.

2. **Emotionally switched on**

Make the conversation personable, comfortable, and fun. Let your personality shine! Make the customer feel that they are talking to a real-life Product Expert.

Pro tip: Using the "Saved Replies" feature, you are able to create and customize a personalized template. Adding your personalized touch makes the conversation more human!

3. **The power of recommendations**

Recommend products based on what customers are looking for or inquiring about. Highlight the newest collections and best sellers to intrigue the customer.

Pro tip: Follow up your recommendations with photos and videos, especially if you have an item available in store. The more details you provide with a product the higher the chances are of making a sale.

Striking the right tone in your chats

Having a well-rounded and thoughtful customer connection can be as simple as remembering 5 key points:

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What to keep in mind while messaging...

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Spelling and Grammar – Ensure that spell check is turned on in devices that Product Experts are using. This will help to minimize spelling and grammatical errors.

Don't rush! – Take your time to compose thoughtful, relevant responses. Experts should take time to fully understand a shopper's inquiry and re-read messages before sending to cultivate a positive chat experience.

Getting the most out of the Store App

Taking some time off? Choose “Away Mode”

You can set yourself as “**Away**” on your days off so that customers know when you’ll be getting back in touch.

Click the clock icon in the top right of your Contacts screen, toggle “**Away Mode**” **ON**, and set an auto-response in case you are contacted.

Remember to toggle “**Away Mode**” **OFF** when you are ready to connect again!

Left messages

If a customer starts a conversation and no product experts are available to chat, they are prompted to leave a message.

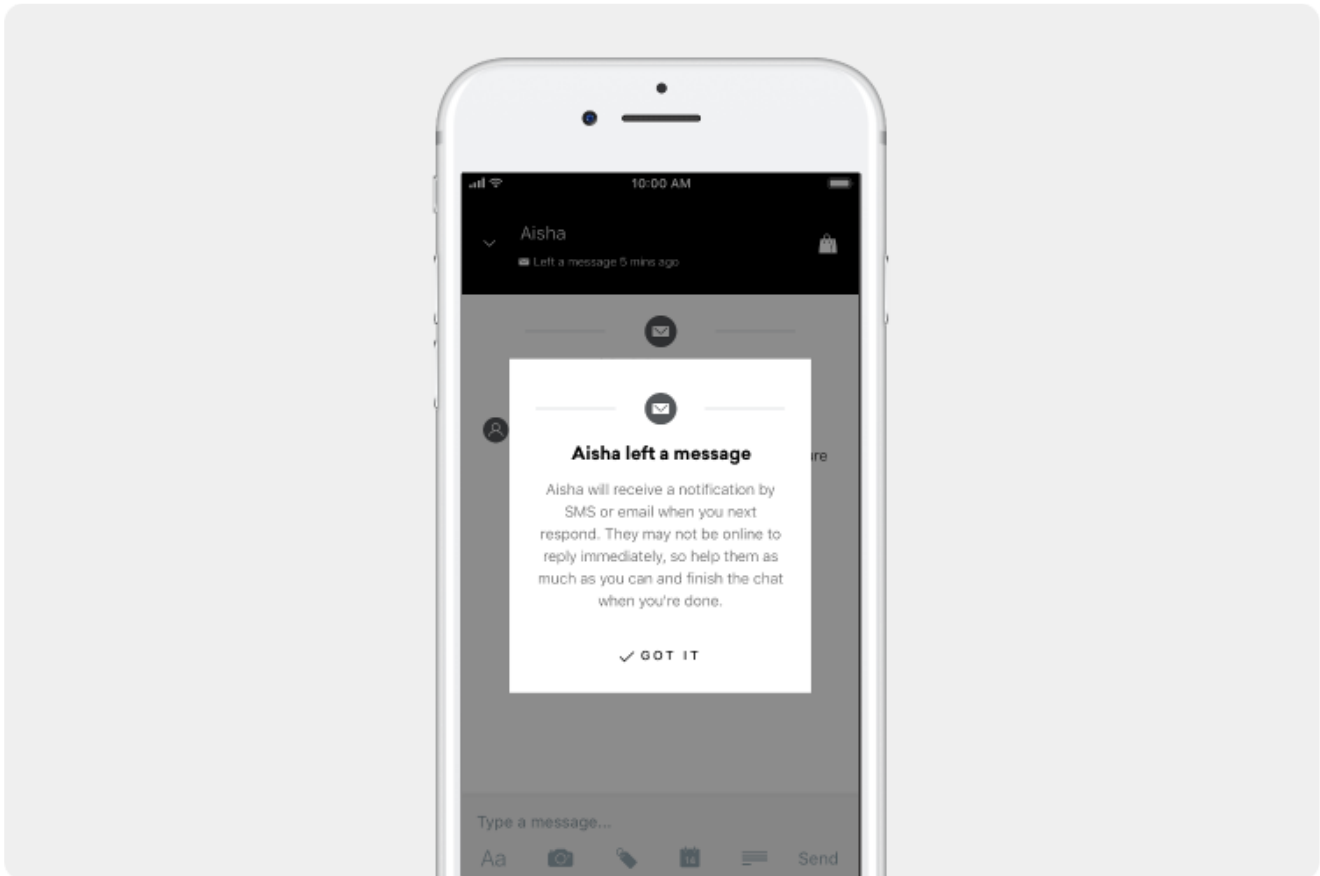
There are two ways to know if a customer has left a message.

1. You will see a full-screen takeover to let you know and to remind you to provide as much detail as possible.
2. In the chat header, you can see if your customer is ‘online’, meaning you are in a live chat, or when your customer left their message.

If the customer comes back to the website while you are still in the conversation, their status will change to online.

When responding to a left message, the goal should be to answer in enough detail, so customers have all the information and inspiration they need to checkout. For the best possible customer experience, any follow-up questions the shopper is likely to ask should be pre-empted.

In addition to a detailed response, sharing photos, videos, and tappable product recommendations ensures that customers have the most convenient experience when they return to the conversation and makes it more likely that the interaction will convert to a sale.



Make use of all the features available during chats

Your goal with Virtual Shopping is to extend the in-store experience to online customers.

Within the Store App, there is a range of features that help you do that!

There are 7 different features that you need to be aware of when using Virtual Shopping.

Shopper events: See what your shopper has been looking at, and what's in their cart. This can give you an idea of their tastes to help you make recommendations they'll love.

Photos and videos: During a chat, you can access your camera roll to send photos and videos directly from your device. You can also take photos and videos live in the moment to show shoppers a snapshot of a product directly from the shop floor.

Invite shoppers in-store: Send shoppers an invite to come in-store when you're available, perhaps to try something on or check out other products they may be interested in. Sure, they can visit the store any time, but this option feels more personal and lets you make sure they visit when you're there.

Contacts: Chat gone well? Or maybe the customer wants updates on the stock in the future? Invite them to join your Contacts, where you can continue the conversation after your initial chat ends.

Product Cards: Send over any products you recommend. The card will show details about the product and lead directly to the product page, making it simple for shoppers to add your recommendations to their order.

Call and video chat: Sometimes, it may be easier to call your shopper if they're interested. You can go audio-only to voice chat, or video chat to show them products in real-time. This is the best way to build their confidence to check out!

Saved replies: Your company will have added some on-brand replies to common questions – and you can add your own in your own voice too. This can help answer shoppers more quickly.

Getting to know your customer

At the top of your screen, you will be able to see what items your customer has been viewing whilst browsing the website. This feature is called the Shopper Bag.

When there is a new activity, a blue dot will appear under the shopping bag icon. This could be that your customer is viewing a new product, has added a product to their basket, or made a purchase.

Additionally, when you first accept a chat and tap your keyboard, you will see pre-set Smart Greetings.

These greetings provide you with a quick & easy way to introduce yourself to all customers.

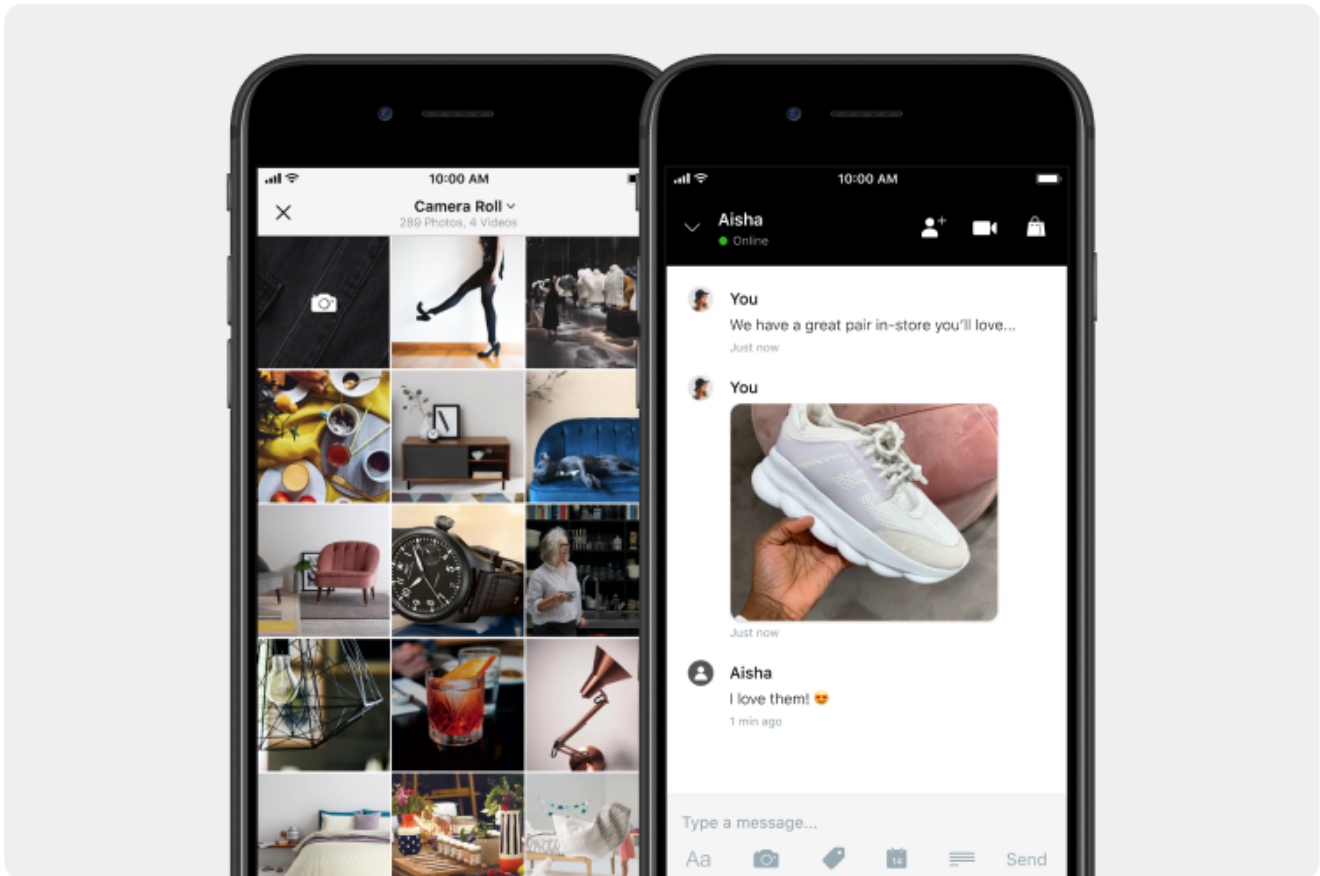
Recommending products

The best way to make an online recommendation to your customer is by sending a Product Card.

By tapping on a product, you will be able to view product information before sending it to your customer.

To send a product to your customer, simply tap the tag icon on the bottom left.

Sending Photos & Videos



With the camera feature, you can send photos and videos directly from the shop floor. You can pull in content from your device's camera roll or record live!

This feature should be leveraged to bring products to life; showing the size, scale, color or material, etc.

Tip: You should take the time to explain each product as they recommend them and be careful not to send too many product cards, as doing this can overwhelm customers.

Video call your customers

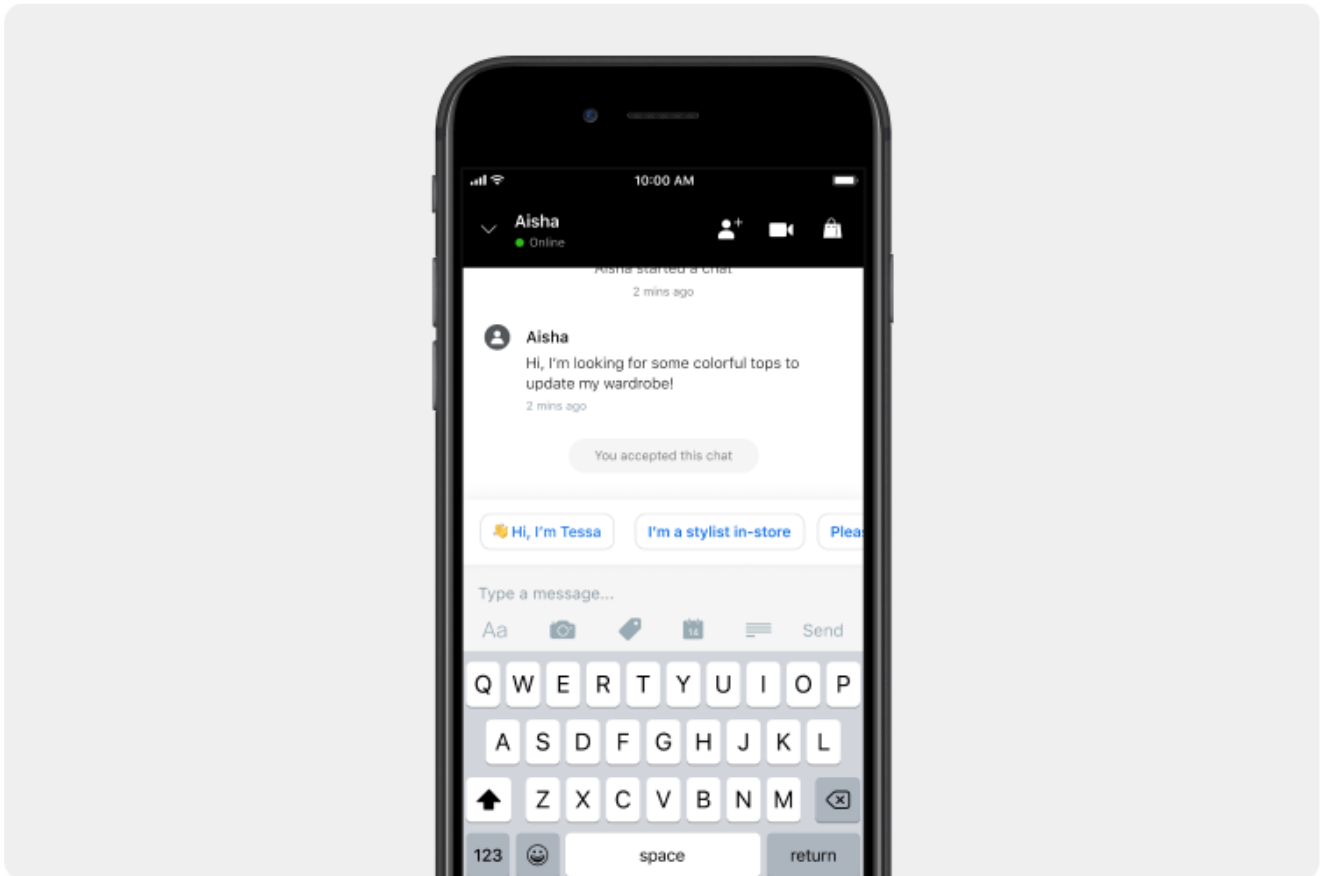
To elevate your connections even further, you can utilize the video-calling feature. Calling your customer is the best way to build a more personal rapport. Simply tap the video icon next to the Shopper Bag to initiate a call.

There are many ways to connect while on the call. Both you and your customer are able to toggle your video on or off based on the type of connection that is best suited. When you end the call, you'll return to your chat.

You also have the option in the Store App to manage call settings, including allowing shoppers to initiate a call themselves if you are happy for them to do so.

Tip: Remember, when you are taking videos or calling their customers, make sure you are doing so from a quiet part of the store to minimize background noise.

Keeping shoppers informed



It is important to greet online shoppers and always let them know if it will take extra time to respond - for example if an item needs to be located on the shop floor to be photographed. Teams can make use of Saved Replies to do so quickly.

Tip: When a team member stops messaging without warning, the customer may think that they are no longer connected and leave the website. This can lead to poor customer experiences and missed opportunities to convert sales.

Chat more efficiently with Saved Replies

Saved Replies help you respond to frequently asked customer questions in an efficient, easy manner.

These replies are preloaded by your HQ and accessible as soon as you begin chatting. You can also build your own custom list based on what replies would be the most helpful for you.

Transferring Chats

If you are unable to assist with a query and need to pass it on to someone else, you can transfer a chat to another available team member.

Let your customer know that they'll need to wait a moment whilst you transfer them to someone else, then tap on "Transfer to someone else" in the chat options menu.

Now you can select the available team or team members you would like to request a transfer. It's important to send a short note explaining why you are transferring this customer. This will be used by whoever claims the chat to understand why the chat has been transferred and how they can help the customer.

The customer will never see this internal note. Let your customer know that they'll need to wait a moment whilst you transfer them to someone else, then tap on "Transfer to someone else" in the chat options menu.

The team members you have selected will then receive your transfer request. The request is active for a limited period to ensure the customer is not waiting too long.

If your transfer is successful you will go back to your home screen. If no one is able to accept the transfer, you will be taken back to the chat. In this situation, you can try again or do your best to assist that customer.

Keep in touch with Contacts

Using our clienteling tool, Contacts, Product Experts can connect with customers offline and continue to build professional relationships.

The Contacts invite should be sent out at the end of every good-quality chat. We recommend adding a saved reply explaining the value of Contacts for Product Experts to utilize in tandem with the invite.

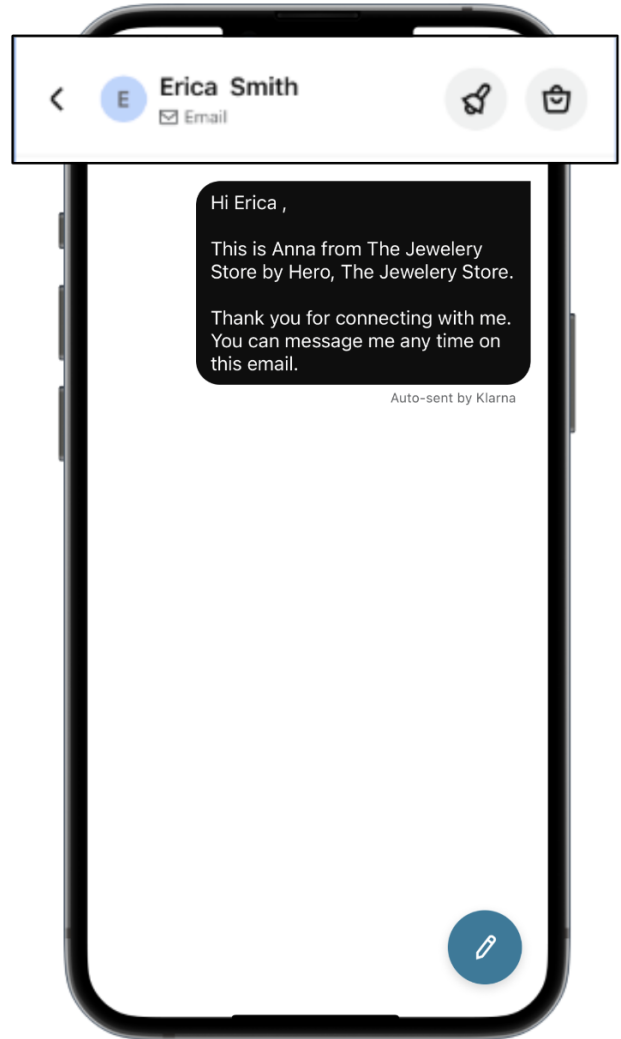
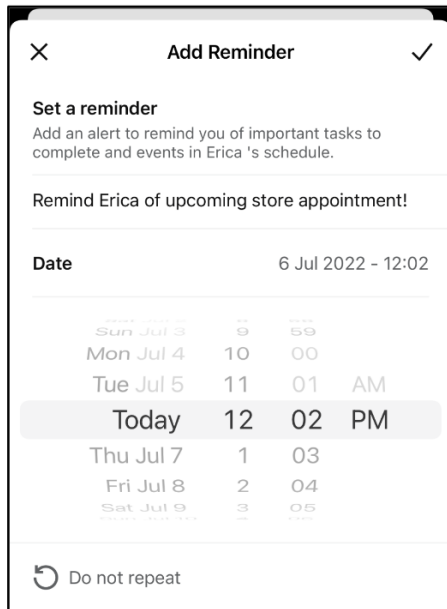
Adding customers to Contacts is a smooth process. Just tap the Person Icon on the top right corner of the chat to initiate the invite.

Set reminders in Contacts

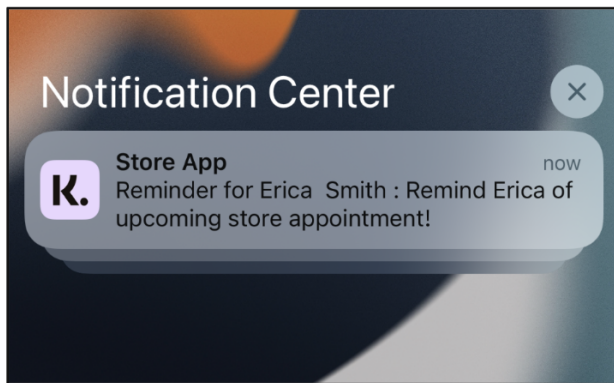
Easily stay on top of outreach by setting reminders to reach out to your customers!

By tapping the **bell** icon on the top right of the chat, you are able to set a reminder. Which will then populate as a notification on your phone screen.

01



02



What Results will you achieve?

If you claim more live chats...

Claiming more live chats will create a better customer experience, as well as giving the product experts more chance of converting.

If you use features more often...

Providing our customers with all the information that they need in order to increase their chances of making a purchase.

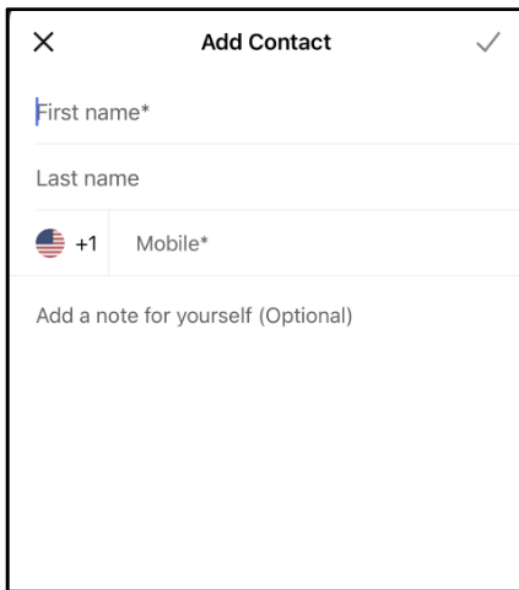
If you make use of Contacts...

Actively using the clienteling tool which will establish loyalty with our customers and drive repeat purchases.

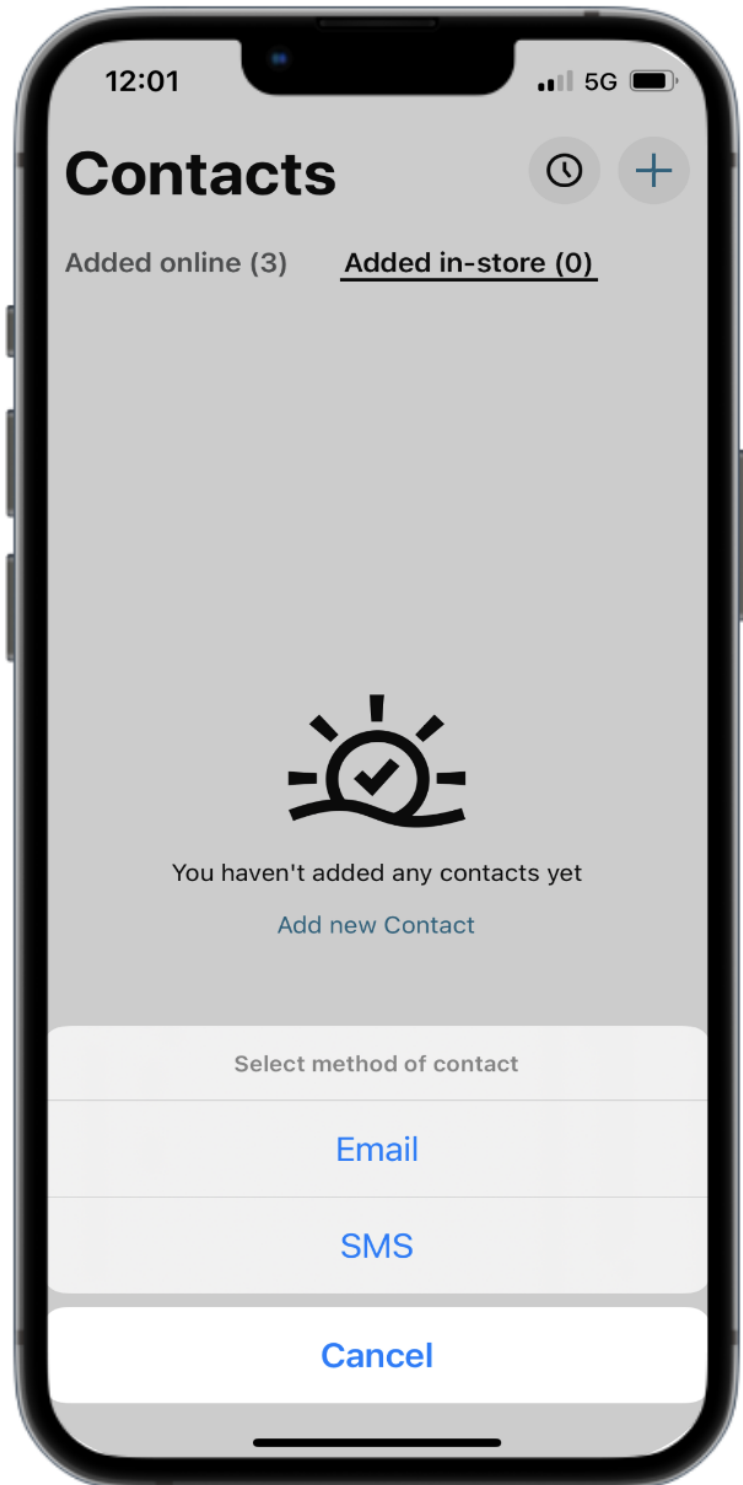
And remember – don't forget about your in-store customers

Did you know that you can also add contacts in-store to stay connected with customers you are meeting in person?

Simply tap the “+” icon in the Contacts section and add the Customer’s name and contact information. It will then sync under the “**Added In-Store Tab**”.



The image shows a screenshot of the 'Add Contact' form. At the top, there is a close button (X) on the left and a checkmark on the right. The title 'Add Contact' is centered. Below the title, there are three input fields: 'First name*' (with a blue cursor), 'Last name', and a phone number field. The phone number field has a US flag icon, '+1', and 'Mobile*' next to it. Below these fields is a text area labeled 'Add a note for yourself (Optional)'. The form is enclosed in a black border.



Invite customers to shop in-store

If your customer wants to visit the store, you can send an invitation complete with the store location and appointment details. When setting up an appointment, you are able to select the date and time. Once sent, you and the customer will be able to add this to your device’s calendar.

Ending a chat

When finishing a chat, you should remind the customer that they can restart the chat at any moment. This helps ensure that no follow-up questions are left unanswered and increases the likelihood of a resulting sale.

Best practice FAQs

What profile picture should I use?

When capturing a profile photo, there are a couple of things to keep in mind. First, Always ensure the picture is work appropriate. Second, please ensure the picture is clear and displays your head and shoulders. Profile pictures help personalize the live shopping experience and our data shows us it improves potential sales. It will also mean that a customer can recognize you immediately if you've invited them in for an in-store appointment.

When is the right time to go available?

DO go available during downtime, or designated times by your supervisor. Be sure you'll have the time to dedicate to your online customers. DON'T go available if the store is very busy or you are in the middle of serving a customer in store.

How quickly should I respond to a chat?

It's important you get back to customers as quickly as possible. Once you have joined a chat, try to send your first message in under 30 seconds, and continue to respond promptly with any additional messages or detail.

What do I do if I'm in a chat and a customer walks into the store?

From time to time, you may have to deal with a customer in-store while you have a chat in progress - it's important you always prioritize physical customers in front of you. When this happens, just let the online customer know that you'll be a few moments. Return as soon as possible to your chat and, if you think you're going to be a while longer, you can transfer the chat to another colleague.

What if a physical customer in the store asks me about the app?

You can always inform your customers about how they can live shop.

What tone of voice should I use with my customer?

It's important you are always polite and friendly just as you would be with a customer in-store. Take your customer's lead, but try to avoid slang and text abbreviations.

What if my spelling isn't great?

Always check your spelling when sending a message, it's better to take a little longer and send a message that's correct than to rush and make mistakes. We recommend using autocorrect on your device.

What if my customer asks me something that's going to take a while to find out?

We always recommend you stay with the customer until the chat is completed as it may lead to a sale, however, we understand that sometimes you may not be able to complete a chat. In these instances, you can simply transfer the chat to another available team member. Tap the chat menu, personalize your message, and seamlessly transfer your chat to another associate who will be able to continue the dialogue.

When should I use product cards?

Product cards are a great way to convert your customer so we recommend using them whenever you are recommending or talking about a product. It's the digital equivalent of taking an item into the fitting rooms so using them will provide an even more seamless experience for your customer.

When should I use photos or videos?

If a customer would like a little more detail on a product, photos, and videos are an excellent way to give them a closer look. Always make sure you're in a well-lit area of the store and that the imagery is not blurry, so your customer can clearly see the items you are showcasing. Make sure if taking videos that you're in a quieter area of the store so there's not too much background noise. It's important to not capture other customers who may be walking past in the background when using the photo and video features so make sure you're always aware of your environment.

When is it appropriate to transfer a customer?

We always recommend that you stick with your customer throughout the entire chat where possible, however, there will be times when a customer needs to be transferred. If a customer needs to speak to a different associate or a chat is running you into overtime, you can transfer a chat to another available associate. Always make sure you let your customer know why you are transferring them.

Who will get the sale?

The sale always goes to the last associate to interact with the customer. So if a chat is transferred, and the customer goes on to make a purchase, the associate they last spoke to will be attributed to the sale. We always recommend you try and complete the sale online, as this is in many cases the quickest and easiest way for the customer to buy.

When should I invite a customer to the store?

If the customer wishes to come into your store, you should use the in-store appointment function which allows you to schedule and send a calendar invite for the customer's visit. This way you'll both be able to add the event to your calendars and set a reminder.

When should I use Saved Replies?

Saved Replies are designed to help you answer faster and more accurately to frequently asked questions. You can browse through the replies and find answers to many questions such as shipping and returns inquiries and other customer service questions.

What if a customer asks me a question I don't know the answer to?

If you're not sure of an answer, simply let the customer know you need a minute to go ask a colleague or supervisor (take your device with you). After you've found the answer, return to the chat.

What if I'm chatting to a customer and they stop responding?

There may be times when the customer stops responding or takes a while to get back to you. Don't worry, your customers may be occupied. In these instances, it is okay to send the customer a message to check in after a few minutes. If the customer does not respond, feel free to end the chat.

What do I do if my star rating drops? How do I keep my star rating high?

Initially, when your star rating drops, the best way to pick it back up is to have more chats. If you see a sustained decline, however, your account manager will be able to review your chats and offer you coaching and advice.

What if a customer's behavior is inappropriate?

If you feel uncomfortable at any point in time simply click the arrow on the top left and select the block option. The customer will not be informed they have been blocked, however, they will not be able to interact with the chat any longer. We advise you to always flag the chat to your Manager that has led to a block.

Video tutorials

Full Virtual Shopping Demo

Want to see Virtual Shopping in action? Tom from the Klarna Virtual Shopping team shows how it works, from the shopper requesting a chat through On-site Chat on your website, to your team connecting and interacting with them through the store app.

[Check it out here.](#)

Dashboard demo

From analytics to team management, the Virtual Shopping Dashboard is your key to managing and tracking your team's performance and access to all things Virtual Shopping.

[Check it out here.](#)