Getting started with SnapEngage

An implementation guide

snap engage

Introduction - Welcome note

We are excited to be welcoming you on board as the newest member of the SnapEngage family. Your organization is now one of the thousands around the globe using SnapEngage to achieve quality interactions with their customers and prospects. We strongly believe that these quality interactions serve a critical role in driving long-term success and relationships and this is exactly the kind of relationship we want to have with you.

Since a good start is half the battle, we want to assist you with this Implementation Guide to :

- define the goals you want SnapEngage to help you meet
- get a detailed overview of settings and capabilities
- configure your account to meet the above goals
- prepare your team for a successful SnapEngage implementation within your organization

We wish you the best on your SnapEngage journey and remind you that we are at your disposal.

Build your core team

We've all been a part of a project without clear leadership, and it's not fun. If it is not clear who is responsible to implement, set up and run SnapEngage in your organization, tasks will not get done or they will be done sporadically.

Define the following roles will help you ensure an easy roll out.

- **Executive Champion.** Having someone from the higher management who will consistently support your Live Chat project among stakeholders.
- **Project Owner.** The Project Owner should be the one who will define the scope of the project and will have a clear picture of what you are trying to achieve.
- **Account Administrator.** The Account Administrator will run your SnapEngage account on a day-to-day basis.
  Use their email address to set up the account instead of a generic one, so that important SnapEngage emails do not go unnoticed.
- **Chat Agent ambassador(s).** These ambassadors should have a very good understanding of your "Chat Agent Team" needs, tasks and processes. They should become experts in the Hub.

Define your Vision

A clear and well defined vision will tell you where you want to be and what you want to achieve after successfully implementing SnapEngage. It will clarify the purpose of the project, eliminate confusion, align efforts and unify the whole team.

The vision will help you define goals which in turn will allow you to measure and prove results.

Define your Goals

The vision needs to be supported by clearly defined and measurable goals. Reaching each one of those goals will bring you, the team and the organization a

step closer to fulfilling your vision. This in turn, will bring the organization closer to its overall vision as everything falls in place painting the bigger picture.

Define your reporting needs

Defining your goals will also help you determine what your reporting needs are going to be. Under Analytics in the Admin Dashboard, you will find several reports that will provide you with the information you need.

Create a Rollout Plan

A rollout plan can help you get the rest of your team members on board. The roll out plan will have teams identified, and milestones for the project that everyone can see.

Create a checklist that will help you plan and stay on track as you proceed with your SnapEngage implementation.

Set a go-live date

Determine when you want to launch SnapEngage on your website.

Determine where on the website chat will be available

Define who and where they will be able to start a chat with your team.

Identify long term users

Identify who is going to be part of your SnapEngage project and with what role. This is about users with administration access to your SnapEngage account and of course the chat agents' team.

Plan training for your users

The SnapEngage help site provides a long list of documentation but you might want to schedule more tailor-made training sessions for both administrators and chat agents with the SnapEngage Client Success team.

Alternatively, your team can attend the various [SnapEngage webinars](#).

Communicate everything to all users of SnapEngage in your company

If your colleagues understand the purpose of why the company needs to adopt SnapEngage, they are most likely to embrace it as well. Chat agents are the face of your organization and without them, goals cannot be reached. Ask for their feedback and concerns and address those.

Get to know SnapEngage

Know what a Widget is and what is referred to as "Hub". Understand what the difference between Proactive and Manual chats is. Make sure you know where to configure the Design Studio, Shortcuts and Labels.

SnapEngage is an easy to use tool but as it is so rich in features, it might be a challenge to learn everything in detail and in a short time. Use our [Support pages](#) to learn about the available features.

Configure Your Settings

As you are approaching your go-live day you will need to start configuring your settings.

Create your widgets

If you are going to be using different widgets create those and name them accordingly. Give them appropriate client facing names and do not name a widget "Paul's 2nd widget".

GDPR

If you will be receiving chats from web-visitors based in the EU, you will need to make sure that you meet GDPR requirements within your SnapEngage account. SnapEngage provides you with the tools to meet those requirements but cannot specify them for you as different organizations have different requirements. Here are the tools at your disposal:

- [Data removal](#) (manual & automated)
- [GDPR / Approval bot](#)
- [Privacy policy checkbox](#)
- DPA; if required, you can sign a DPA with SnapEngage. Reach out to your contacts in SnapEngage to request this.

Add Permission Users

Configure any Permission users and also involve them in configuring all your settings. You can choose among the four pre-existing Permission roles or create custom ones.

Design Studio

Use the [Design Studio](#) to create a unified customer experience on your website which is in line with the brand perception you want your clients to have for you.

Proactive Chat

Proactive chat is a very powerful feature that can increase visitors' engagement, customer satisfaction, and lead generation. You will experience much better results if you spend time planning an effective proactive chat strategy. Some quick tips that you can also discuss with your contacts in SnapEngage:

- Be welcoming, not intrusive

Use the re-engagement delay to give site visitors who might not want to chat with you a break before the system sends out another invitation.

- Targeted messaging

Generic invitation messages can be effective on your home page, but you are bound to achieve better results if you target your visitors with specific messages based on their profile and their journey through your website.

- Route to the most appropriate agent with the [advanced settings](#).

Labels

Labels is a really powerful feature allowing your agents to categorize conversations sent to your CRM, Help Desk integration or in your CSV logs exports. With Labels you can capture any kind of information you want not only to follow up properly after a chat but also to analyze the way your web-visitors are using the chat.

CRM / Helpdesk Integration

You will be able to set up the integration with your existing workflow very easily. SnapEngage will send the transcript of the chat to your CRM / Helpdesk once it is over.

If your integration allows custom mappings, you can customize the information you collect and send to your CRM / Helpdesk. Labels can also be mapped and sent.

Set up your Agent Team

It is also time to start setting up the Chat Agents team. Inform them that they will be receiving a sign up email from SnapEngage.

It is safe for chat agents to login in their Hub and start exploring.

Route the chats to your agents

Determine how chats will be routed to your agents:

● Notify all online agents for each incoming chat (limited to a maximum number of 5 agents - not applicable to proactive chat).

● Automatically assign each incoming chat to a specific agent.

Read here more about those two options.

Use the below features to route a chat to the most suitable chat agent:

- Widget selector
- Proactive chat advanced settings

Train your team

Either schedule an on-boarding training for you team (talk to your contact in SnapEngage for this), or ask them to attend one of the public webinars.

Install SnapEngage & Go Live

Ask the Executive Champion to send an email to all users announcing the go-live date and bring some excitement to the team.

Have a Team Chat created including all agents, welcoming them and encouraging them to use this channel for any questions they might have.

Measure, Evaluate, Adjust

As you start receiving chats, you will start collecting data that will help you analyze your web-visitors' behavior. And as with any customer engagement activity and strategy, you should not treat SnapEngage as a set-it-and-forget-it solution. Ongoing evaluation and optimization is the only way to achieve continued growth.

Encourage User Adoption

Supporting your Chat Agents should be an ongoing process. They need to login to their Hub so that live chat is online on your website. Check the agent availability report and see who logs in and when they are available to receive chats.

Get their feedback about using the Hub, ask for their contribution in creating shortcuts, labels and other workflows. Encourage them to use the Team Chat to ask the rest of the team for help.