

A Complete Guide to Tracking... Live Chat



Jamal

Hi, I'm interested.

Business

Great, how can I help?



Jamal

is typing...



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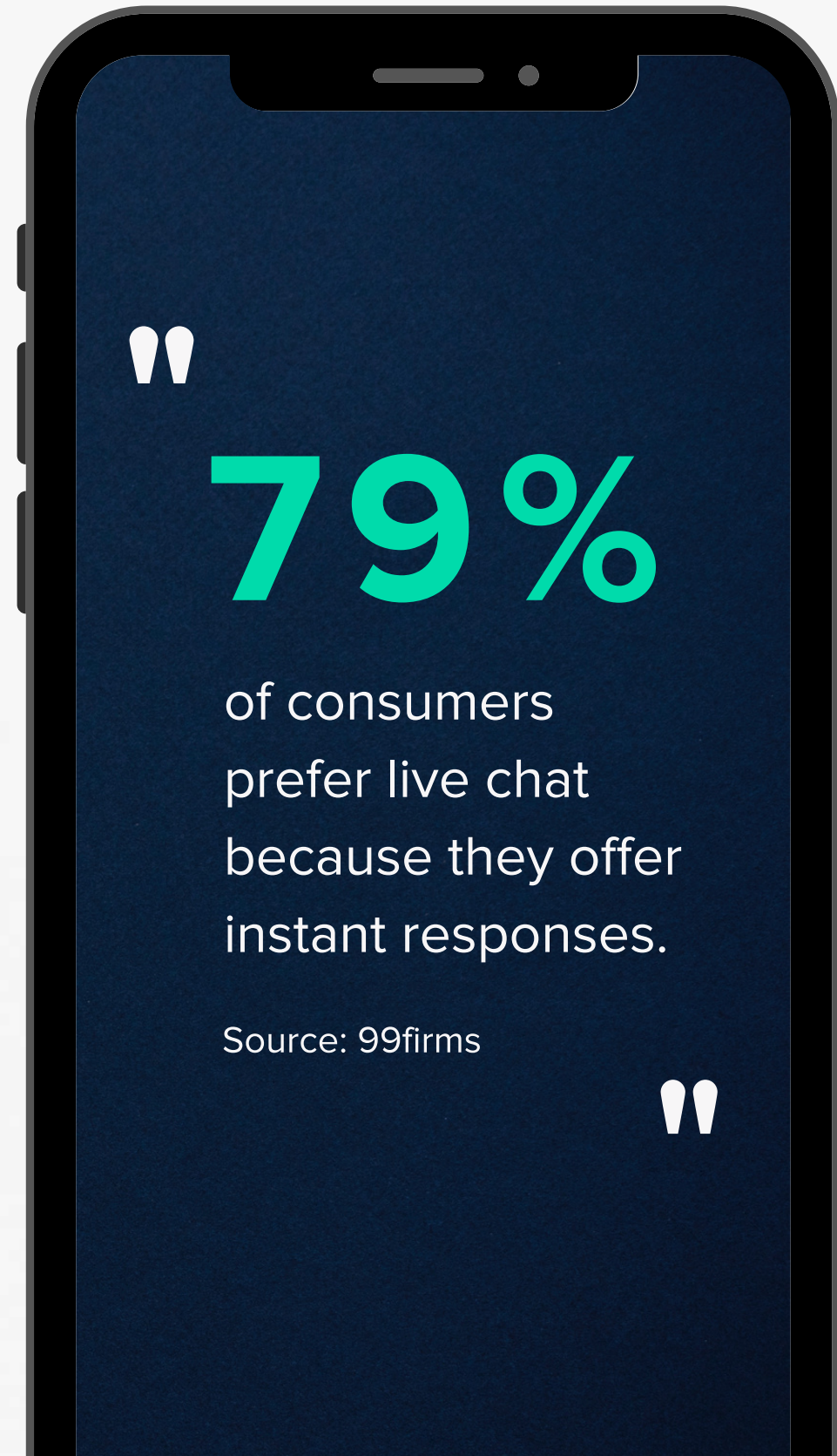
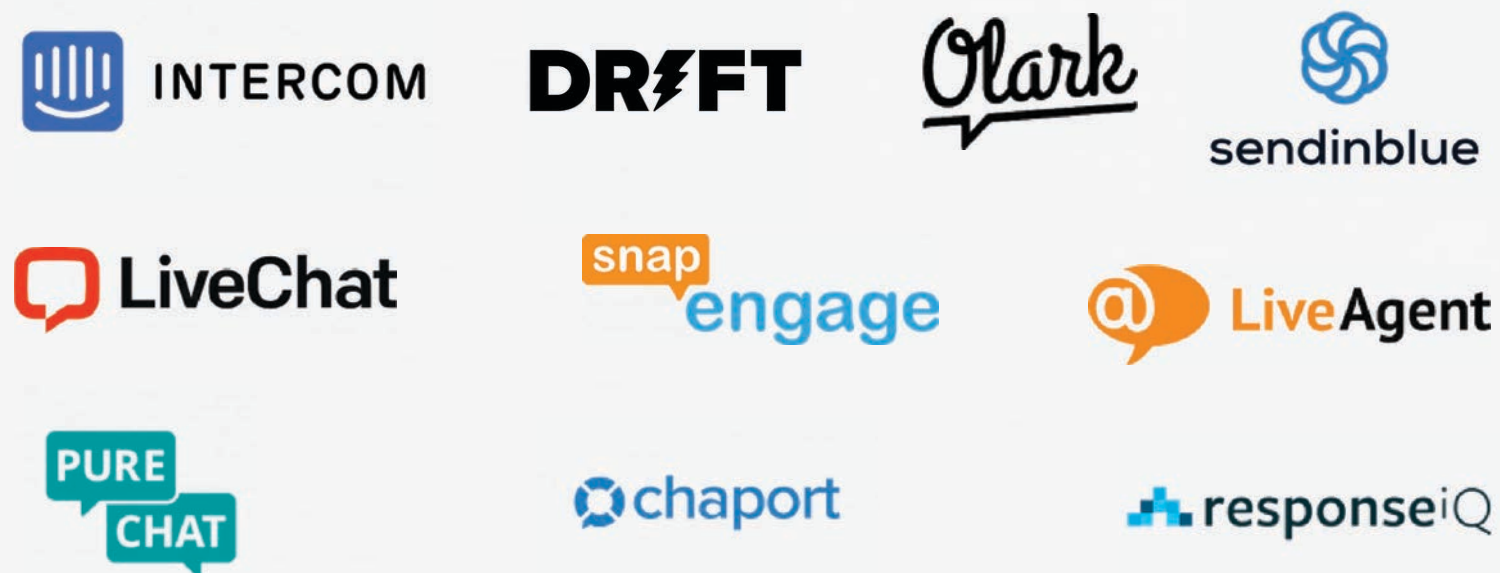


What is live chat?

Live chat is an online communication tool that you can integrate directly onto your website.

Remember, we're in a society where consumers want answers and solutions in an instant.

While phone calls and form submissions are a great way to convert some website users, others want to speak to a human straight away. That's where live chat comes in.



Key live chat performance metrics

Each live chat tool will have their own reporting options directly within the app.

From volume of chat, to average chat time, we share the top metrics you need to keep an eye on when measuring your live chat performance.

Live chat metrics to track:

1 Number of chats

One key metric for qualifying your live chat performance is the number of chats you receive on a daily, weekly and monthly basis.

3 Chat duration

You don't want to shoo users off chat but you do want to resolve their query as quickly as possible. Monitoring average chat length is a good indicator of live chat performance.

5 Website visitors to chats

Track how live chat is used by your website visitors and if there's scope to make it more accessible to more users.

2 First response time

The lower your response time, the more effective the chat will be. Look at your agent's response time averages. It could identify a team member who might need extra training.

4 Customer happiness

A simple post-chat survey will help you to identify the percentage of users who get a satisfactory response.

6 Impact on sales

Are your live chat prompts or good customer service chats resulting in more sales? This metric will help you definitively prove its worth.





The issue with tracking live chat's impact on sales

Metric one to five are pretty easy to measure. But what about metric six? This is much more difficult to prove.

To explain the issue with tracking live chat's impact on sales, we're going to use an example.

Jamal is a lead in your CRM. Your sales team converted him directly on live chat.

But all you can see is that he converted on chat. You can't see which channels supported that conversion.



Jamal

Lead

jamal@business.com

Lead source: unknown

Conversion type: unknown

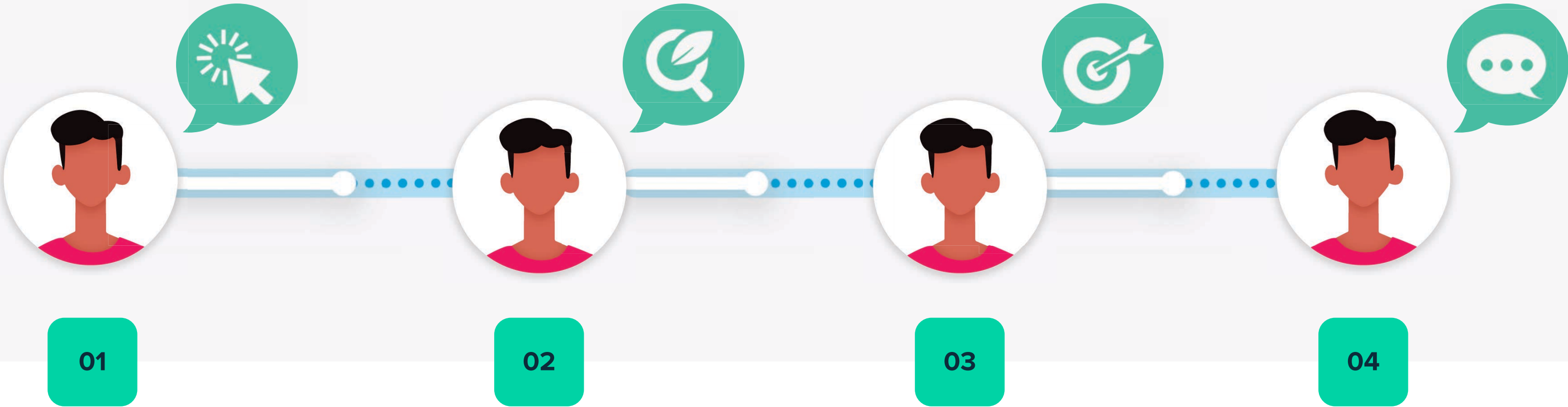
Cost for Acquisition: unknown

Customer Journey: unknown



Jamal's customer journey

We're going to let you in on a secret. Here's Jamal's actual customer journey - how he converted via a live chat session.



1st interaction

Jamal is searching online and clicks on a PPC campaign to your website

1 week later

Jamal organically searches and again lands on your website

2 weeks later

Jamal revisits your site via a direct search

Conversion

He engages with your live chat prompt and is quickly converted into a sale



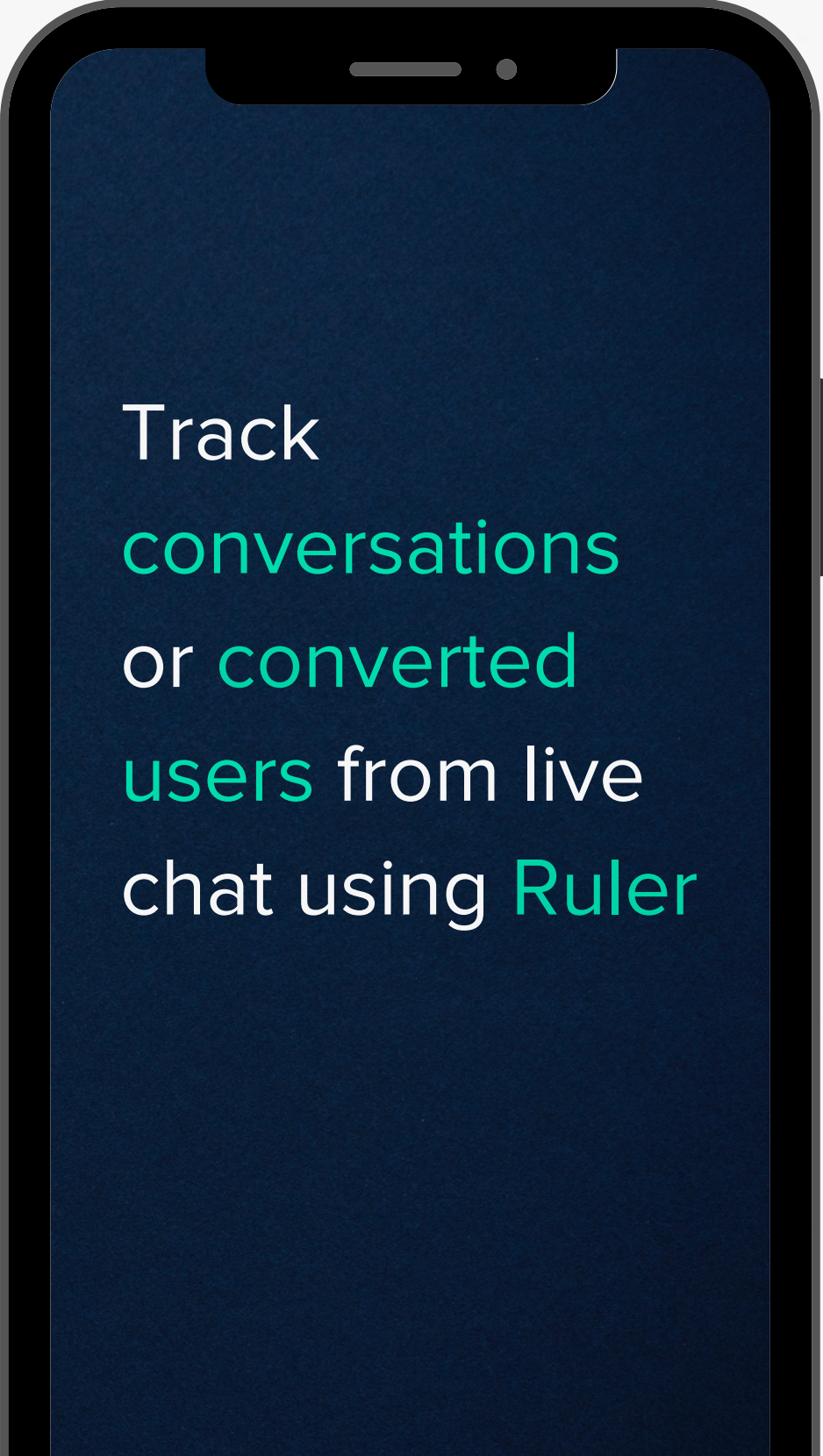
The workaround

Ok, so we know you can track the number of live chat entries you have directly in the live chat app. But what if you could track each conversation and add them to your lead's customer journey?

That's exactly what Ruler does.

Let's follow Jamal's customer journey to highlight how easy it is to track your live chat using marketing attribution tools.

Ruler's simple integration allows us to fire web hooks between our software and your chosen live chat provider.

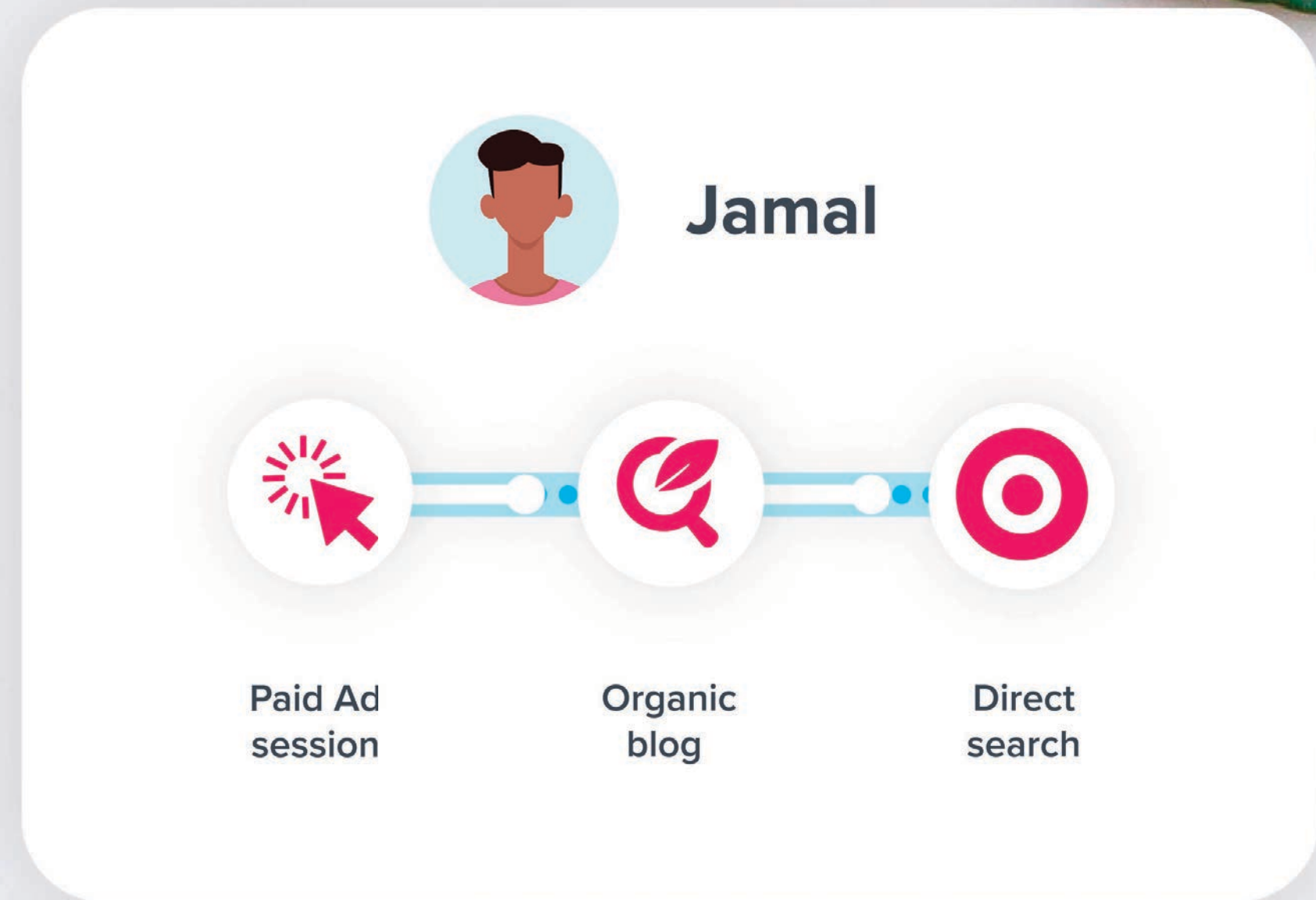
A dark blue smartphone graphic with a black border, positioned vertically on the right side of the page. The screen displays text in white and teal.

Track
conversations
or converted
users from live
chat using Ruler

Step One: Tracking

From Jamal's first session, Ruler has been tracking and storing his marketing and lead data. This includes which channels have referred him as well as the content he engages with each session.

This allows Ruler to build up Jamal's customer journey.





Jamal

Hi, I'm interested.

Business

Great, how can I help?



Jamal

is typing...

Step Two: Engagement

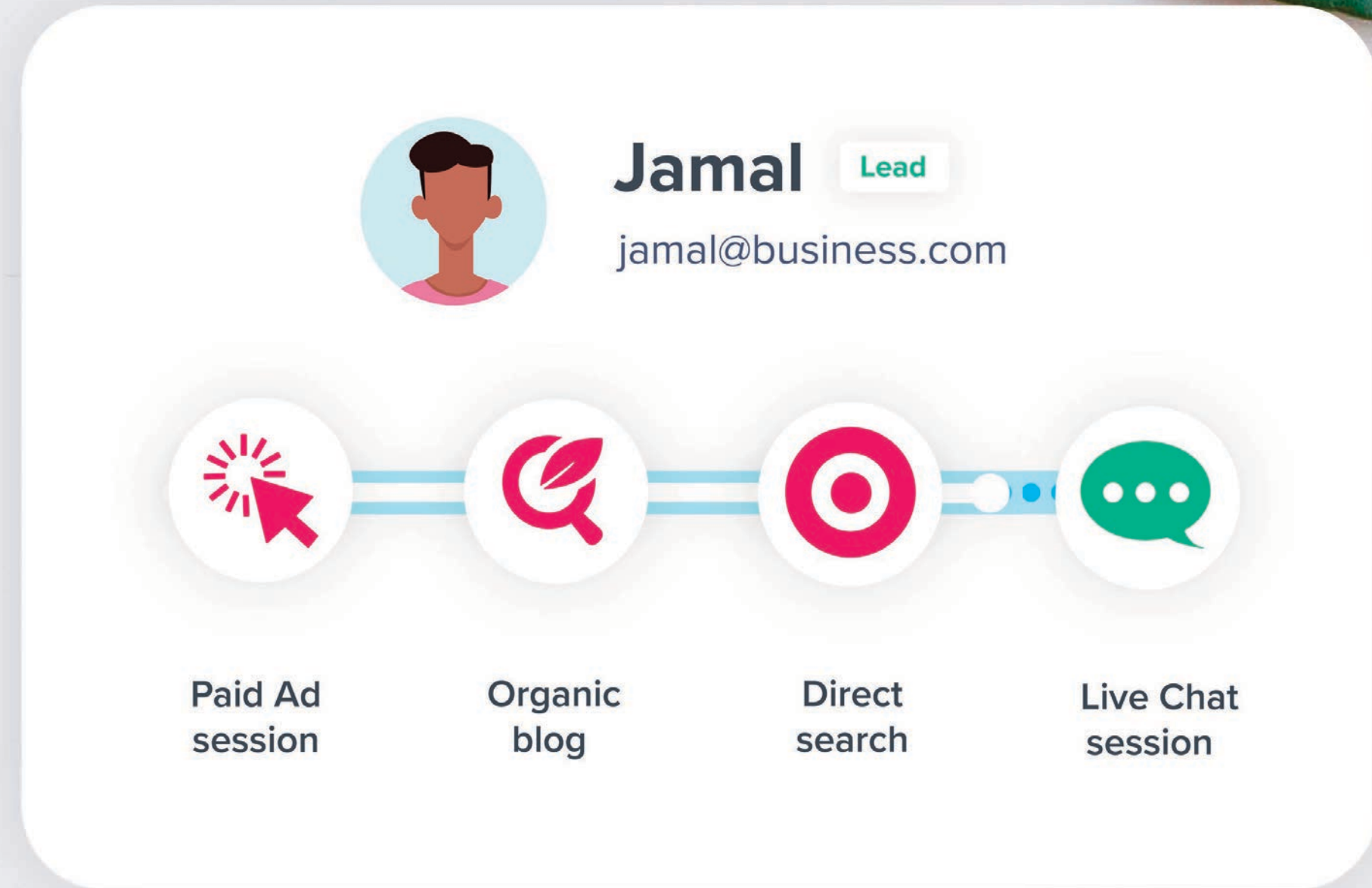
Jamal lands on a product page of yours and is showing interest in your content.

A live chat prompt shows, and Jamal engages. Thanks to the live chat integration with Ruler, we can also track this conversation.

Step Three: Code Fires

The only way to properly track live chats as part of a full customer journey is with marketing attribution.

Ruler's code on your website will fire and Ruler will add this live chat session to Jamal's customer journey.





Jamal

Lead

jamal@business.com

Lead source: Paid search

Campaign: B2B tech

Keyword: Best B2B tech

Conversion type: Live chat

Step Four: Lead input to CRM

As Jamal converts into a lead, Ruler will automatically fire all the data held on him over to your CRM.

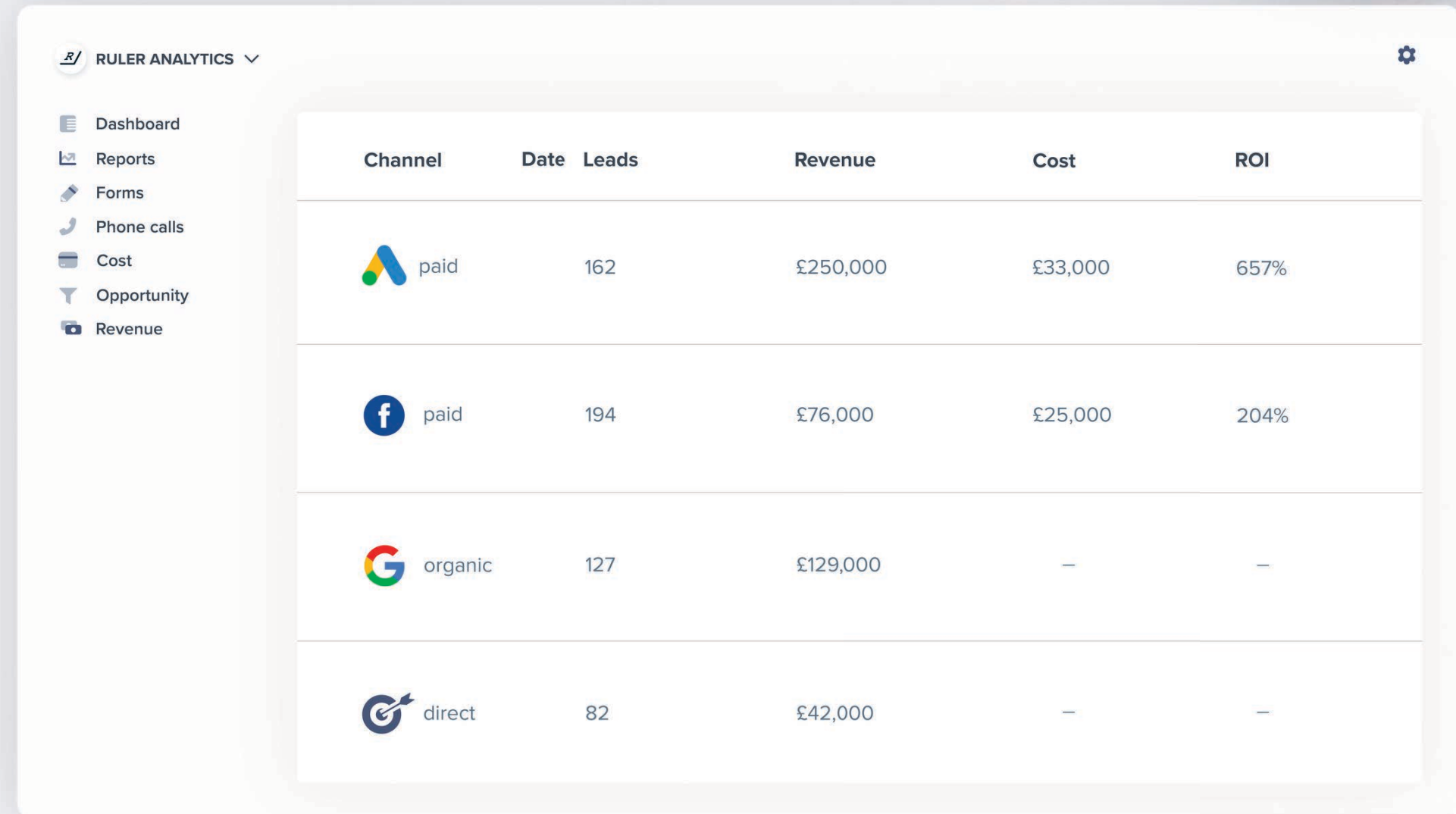
This includes all the marketing and lead data plus his customer journey. At that point, you'll be able to view Jamal directly in your CRM with no manual input needed..

Step Five: Conversion





Once revenue is placed against Jamal as the sales rep closes him, Ruler will fire again.

This time, Ruler will scrape that revenue data and fire it your chosen marketing analytics apps like Google Analytics and Google Ads.

You'll be able to see how your channels are driving revenue no matter what part of the customer journey they're in.



The screenshot shows the Ruler Analytics dashboard. On the left is a navigation menu with options: Dashboard, Reports, Forms, Phone calls, Cost, Opportunity, and Revenue. The main area displays a table with the following data:

Channel	Date	Leads	Revenue	Cost	ROI
 paid		162	£250,000	£33,000	657%
 paid		194	£76,000	£25,000	204%
 organic		127	£129,000	—	—
 direct		82	£42,000	—	—



Jamal

Lead

jamal@business.com



Step Six: Attribution

In Ruler, you can use custom reports to better understand how your channels work together to drive leads and revenue.

Choose from a range of different attribution model types to find the one that best suits you.

Here's how Jamal's customer journey would be attributed against a time decay model.

Data you would miss without multi-touch attribution



01

Customer journey

Without multi-attribution tools like Ruler, you wouldn't have oversight of full customer journeys.

Even if you could track what session drove a live chat conversation, that doesn't mean that much.

In our example, Jamal converted into live chat via a direct search. To a marketing team, this would mean very little.

It's only with the full customer journey that we can appreciate the role that paid and organic both had in his conversion.

02

ROI and ROAS

If you're not using multi-attribution tools like Ruler, you're missing out on vital data. Revenue data.

While you knew that Jamal converted via live chat into a sale of £99, you didn't know which channels affected or influenced that sale.

We know it was a paid ad that started Jamal's customer journey. Without Ruler, that cost could not be attributed and you would be left with an inaccurate ROAS.

Ruler can fire your revenue data back to tools like Google Analytics and Google Ads so you can get full oversight on your impact.

03

Lead and conversion data

From which channels they engaged with, how they engage with your web content to conversions, Ruler can track it all.

And it's not just live chat.

Ruler can track form submission and phone calls, meaning you won't be left in the dark.

By the time a lead is generated, Ruler will have collected key information vital for both your sales and marketing teams.

You'll be able to understand which leads are generating high revenue and correlate them back to your marketing initiatives.

Track each and every conversion with Ruler

Phone calls

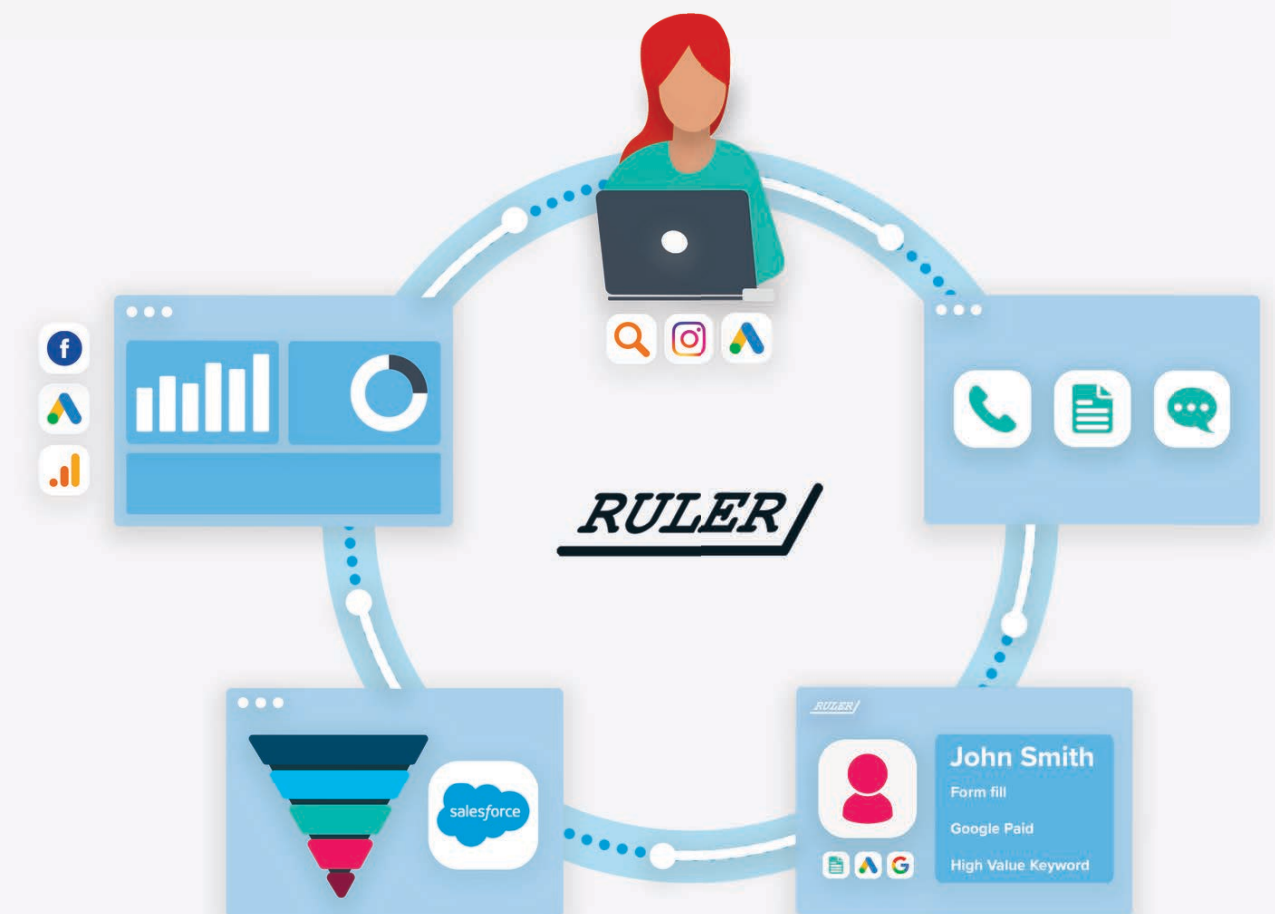
Not tracking phone calls yet? It's easy! Dynamic number insertion using a marketing attribution tool like ours means every call is accounted for. You can see which marketing channels and campaigns have driven calls, and where in the customer journey you tend to see inbound calls come in.

Form submissions

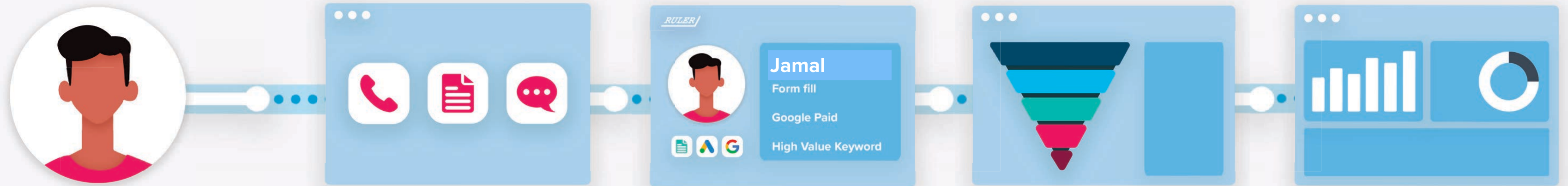
Form submissions are significantly easier to track than calls or live chat. But what about their role in the full customer journey? While you might be able to track volume of form submissions, you're likely not getting visibility of how they lead to sales. Or, which marketing channels or campaigns are driving leads via form that close into a sale.

Live chat

Don't forget live chat! We've already covered it in this eBook, but with marketing attribution you can piece together your customer journeys and finally get full visibility of your leads and their touchpoints.



How Ruler Analytics works



01

Traffic

Ruler tracks each anonymous visitor to the website over multiple sessions, traffic sources and keywords.

02

Website

When a visitor converts via form, call tracking or live chat on your website, their data is captured.

03

Matching

Ruler matches the real user's details with their marketing touchpoints.

04

Integration

The marketing and conversion data is sent to your CRM or sales reporting tools. Marketing data includes channel, source, campaign, keyword and/or landing page.

05

Close the Loop

Upon conversion, revenue is attributed to the channels, campaigns and keywords that influenced it and can be fired into the marketing apps you choose.



Ruler's integrations

Ruler integrates with 1000s of apps, helping you get the data you need, where you need it most. And we integrate with loads of live chat tools. Here are just some of the live chat applications we can link with.

Contact us to set up your live chat integration.



INTERCOM

DRIFT

Clark



LiveChat

snap engage

@ LiveAgent



sendinblue

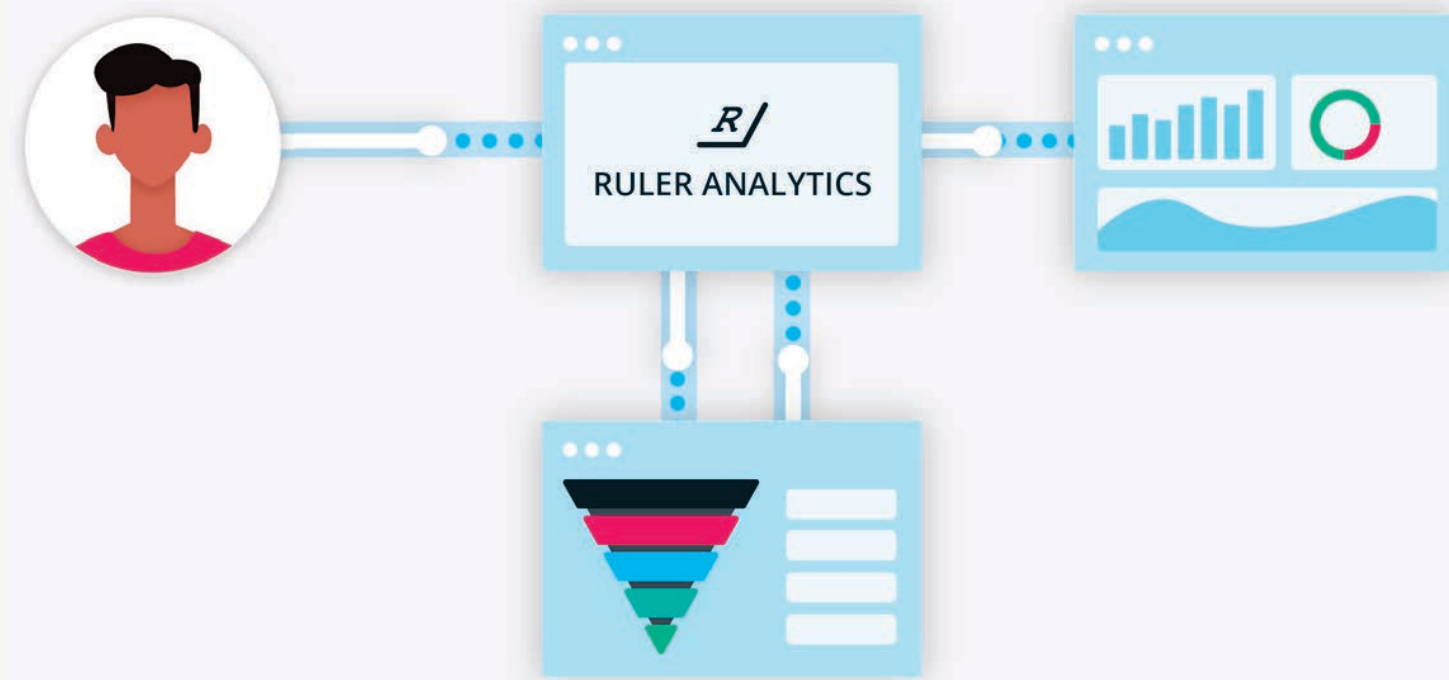
chaport

responseIQ

Ruler doesn't just **integrate** with 1000s of apps. It makes them **work harder** for you.

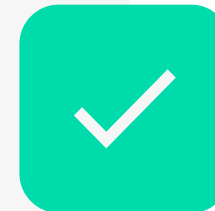


Benefits of multi-touch attribution



Full visibility of your lead quality

When you're using paid, offline conversions, or just have long customer journeys, it can be hard to track which leads go on to become sales. Even trickier is knowing which channels and campaigns are driving high-quality leads, and which are driving low-quality leads. Multi-touch attribution solves this and gives you complete lead visibility.



Enrich your CRM

Since Ruler scrapes and fires your closed revenue back to your marketing analytics, it means you can properly attribute sales to the marketing channels and campaigns that influenced them. You'll get true return on investment and now you know what's working, you can optimise your marketing.



Pass through additional variables

With proper tracking, you might find that paid advertising works really well to move those in the awareness stage into the consideration stage. Or, that your organic blogs are working well from an awareness perspective. Whatever it is, it means you can refine your content and send the right messages to the right people at the right time.



Case Study - Money Penny



Money Penny is the world's leading outsourced communications provider for thousands of clients across the UK and USA.

Money Penny's marketing team engage across all digital marketing channels to drive leads, who then typically engage with the sales team across difficult-to-track channels. This posed a reporting challenge for Money Penny, who lost visibility once the lead was handed to the sales team.

By implementing Ruler across their website, Money Penny has been able to definitively track all visitors to their website and match lead data back to the original source. No matter if leads have come from call, form or live chat. This enriched data is then pushed to Google Analytics and Ads where the team can see leads, opportunities and won clients attributed back to specific campaigns and keywords, which removed time-consuming tasks from the team's to-do list.

"With full visibility of our leads across every channel, we've been able to put our money where it's needed most. Our spend has stayed consistent year on year, but we're now able to optimise based on revenue rather than conversions.

At first glance, our generic paid search campaigns appeared more expensive due to the competitive nature of the keywords. Ruler's offline conversion tracking discovered more leads had interacted with these campaigns, which had a big impact on our CPL and allowed us to be more focused on our spend.

Daniel Marshall, Digital Marketing Manager





Final thoughts

Knowing where your conversions are coming from is key. To maximise ROI, however, you need to take a collaborative approach to understand what constitutes a high-quality lead so that you can use that insight to reduce churn, improve retention and increase revenue incomes.

Using a tool like Ruler Analytics, you can unlock powerful data across the entire sales cycle, and more importantly, evidence the effectiveness of your marketing campaigns based on actual revenue, and not just the number of conversions you've generated in Google Analytics.

Contact us to find out how to implement Ruler's marketing attribution solution and take your end-to-end conversion tracking to new heights.

Want to find out more?

Book a demo with Ruler's attribution experts today at www.ruleranalytics.com