STANDARD OPERATING PROCEDURE

Live Chat Support SOP

Document no.	SOP-CS-004
Revision	1.0
Owner	Customer Service Manager
Effective date	September 15, 2026
Review cycle	Every 12 months

1. Purpose

To make sure live chat conversations are accepted quickly, handled with accurate and personalized messaging within a manageable concurrent chat load, and closed only once the issue is actually resolved.

2. Scope

Applies to real-time chat conversations through the website or app chat widget, including handling multiple concurrent chats. Email and phone are covered by their own SOPs.

Definitions

Concurrent chat limit	The maximum number of chats an agent is allowed to handle at the same time.
Quick reply	A pre-written short response used as a starting point for a common question.
Chat transfer	Moving an active chat to another queue or agent with a summary of what has been discussed.
Post-chat survey	A short satisfaction survey sent to the customer after the chat ends.

3. Responsibilities

Support Agent	Accepts, handles, verifies and closes chats within the concurrent chat limit.
Team Lead	Receives transferred chats outside agent scope and monitors queue load.
Quality Analyst	Reviews chat transcripts monthly for tone, accuracy and speed.

RACI matrix

Activity	Support Agent	Team Lead	Quality Analyst
Accept chat within target time	R/A	I	-
Verify identity before sharing details	R/A	C	-
Transfer or resolve the chat	R/A	C	-
Review chat transcripts for quality	I	C	R/A

R = Responsible, A = Accountable, C = Consulted, I = Informed

4. Materials and PPE

Materials, tools and systems

- Live chat platform
- Quick reply template library
- Knowledge base
- Concurrent chat limit policy
- CRM

5. Procedure

Step	Task	Owner	Done
5.1	**Accept the incoming chat** The Support Agent accepts the chat within the target response time and sends a greeting confirming they are ready to help. **Checkpoint:** The greeting is sent within the target seconds window defined for the chat queue.	Support Agent	☐
5.2	**Confirm name and reason** The Support Agent confirms the customer's name and asks them to describe the reason for the chat.	Support Agent	☐
5.3	**Check concurrent chat load** Before accepting another chat, the Support Agent checks their current concurrent chat count against the defined limit. **Warning:** Exceeding the concurrent chat limit leads to slow, low-quality responses across every chat the agent is handling.	Support Agent	☐
5.4	**Research while updating the customer** The Support Agent searches the knowledge base or account history while sending short updates so the customer knows research is in progress.	Support Agent	☐
5.5	**Use quick replies thoughtfully** The Support Agent uses quick reply templates for common questions, personalizing the wording before sending rather than pasting it unedited.	Support Agent	☐
5.6	**Verify identity before sensitive details** The Support Agent verifies the customer's identity using the standard method before sharing or changing any account-specific details. **Checkpoint:** Identity is confirmed before any sensitive account information is shared in the chat.	Support Agent	☐
5.7	**Transfer if outside scope** If the request is outside the agent's scope, the Support Agent transfers the chat to the correct queue or Team Lead with a summary of what has already been discussed.	Support Agent	☐
5.8	**Confirm resolution before closing** The Support Agent asks the customer to confirm their issue is resolved, or agrees clear next steps, before ending the chat. **Checkpoint:** An explicit yes from the customer, or an agreed next step, is recorded before the chat is closed.	Support Agent	☐
5.9	**Send a transcript if requested** The Support Agent sends the chat transcript or a summary to the customer if they ask for one.	Support Agent	☐

Step	Task	Owner	Done
5.10	**Tag and log the chat** The Support Agent tags the chat by category and logs it in the CRM with the outcome.	Support Agent	☐
5.11	**Close with a sign-off** The Support Agent ends the chat with a polite sign-off and a prompt for the post-chat satisfaction survey.	Support Agent	☐
5.12	**Review transcripts monthly** The Quality Analyst reviews a sample of chat transcripts each month for tone, accuracy and response speed, and shares feedback with the Team Lead.	Quality Analyst	☐

6. Quality checks

- Chats are accepted within the target response time.
- Agents stay within the concurrent chat limit.
- Identity is verified before sensitive account details are shared.
- Every chat is tagged and logged in the CRM.

7. Records

- Chat transcript
- Chat tag and category in the CRM
- Monthly chat quality review notes

8. KPIs

- Average chat response time
- Concurrent chat limit adherence rate
- Chat resolution rate without transfer
- Customer satisfaction score from post-chat survey

9. Common mistakes

- Accepting more chats than the concurrent limit allows.
- Sharing account details before verifying the customer's identity.
- Ending a chat before confirming the issue is actually resolved.
- Pasting a quick reply template without adjusting it to the real question.

10. Revision history

Revision	Date	Description	Reviewed by
1.0	September 15, 2026	Initial release	Alexa Uskova

Approval

Prepared by	Approved by	Date

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