

# Virtuoso.com Chat Program

## Overview

### For Agency Owners/Managers and Advisors

Updated: 7/22/16

The Virtuoso.com Chat feature allows Virtuoso.com visitors to engage in real-time chat sessions with participating Virtuoso advisors. Participating agencies also have the option to include the Chat feature on their agency website as well.

Virtuoso is partnering with Engage, the company who built the chatting platform, for this program.

### **PARTICIPATION REQUIREMENTS TO APPEAR ON VIRTUOSO.COM**

- Agency and advisor(s) must remain in good business standing with Virtuoso as defined in the then current Virtuoso Member Agreement and current Conditions of Membership
- Agency and advisor(s) must be a current participant of the Core Virtuoso.com Lead Gen program
- Agency must accept responsibility for managing their advisors' requirements and participation
- Advisor must have a visible profile on virtuoso.com (all required fields must be complete and profile set to visible on virtuoso.com)
- Advisors must complete the Virtuoso.com Chat program training in the Virtuoso Travel Academy, including acceptance of program requirements
- Advisor must respond to the website visitor immediately and complete the initial chat conversation
- Advisor should utilize the initial chat script provided by Virtuoso for each new chat session
- If a site visitor indicates that they have previously worked with another advisor, the Chat advisor must notify the person that they should continue to work with their existing advisor
- Advisors may be removed from the Virtuoso.com Chat Program at Virtuoso's discretion

### **PROGRAM FEE**

Participating agencies will be billed by Engage, our preferred partner, who will provide a 30% discount off of retail rates. Initial rates are estimated at \$7 per month per advisor/seat. The charge applies to all advisors, including Owners/Managers who are not receiving chats.

### **HOW THE PROGRAM WORKS**

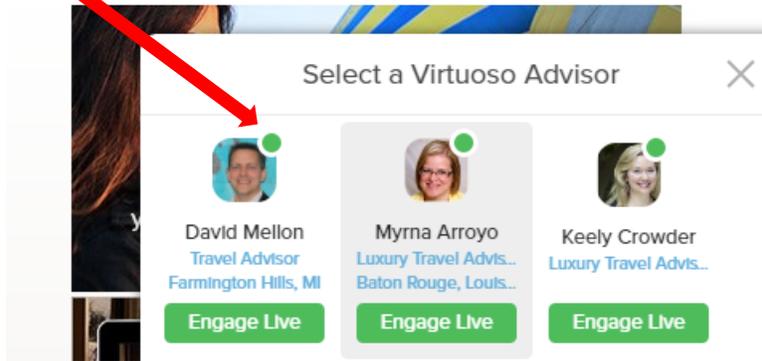
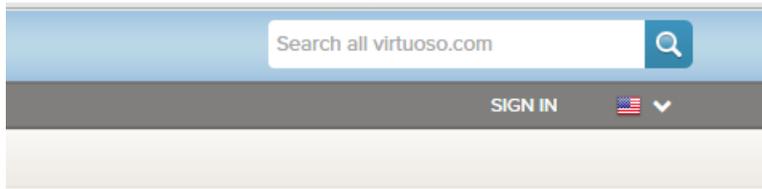
- 1) Agency Owner/Manager confirms that agency and interested advisor(s) meet all of the program requirements above.
- 2) Agency Owner/Manager emails a request to participate in Virtuoso.com chat to [ntaylor@virtuoso.com](mailto:ntaylor@virtuoso.com). This request should include the names and email addresses of the Lead Gen advisor(s) who wish to participate.
- 3) Virtuoso verifies that requirements have been met, then instructs Owner/Manager to set up a new agency account with Engage and approves Engage to turn on the advisor(s) for Virtuoso.com Chat.
- 4) Engage advises the Owner/Manager and Virtuoso once the account and advisor setup is complete.
- 5) If agency wishes to add an advisor to the program at a later time, the Owner/Manager can email the name and address of the advisor to [ntaylor@virtuoso.com](mailto:ntaylor@virtuoso.com).

### **HOW CHATTING WORKS**

Advisors will log into the Engage web application (<https://dashboard.engage.co>) which acts as a chat portal. The application works in all major browsers, but it will work best in Chrome. Advisors will use their email address and password to log in.

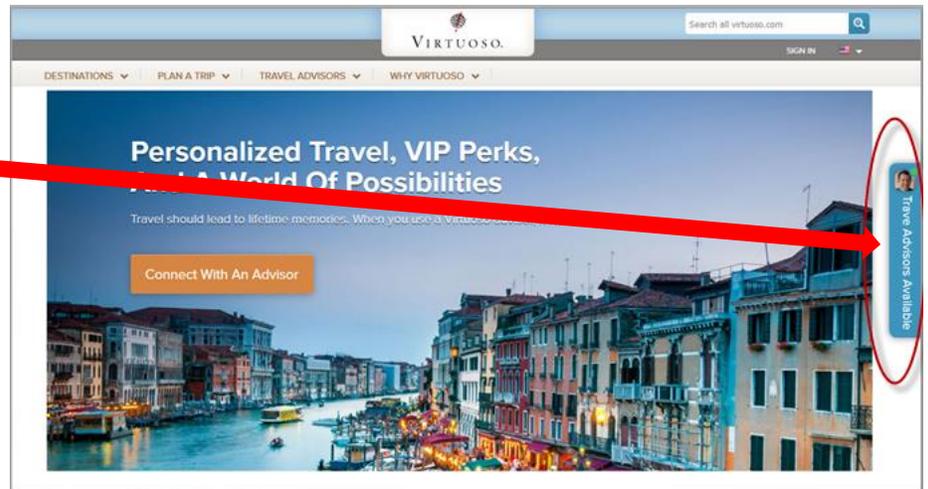
When advisors log in, their status needs to show as "Online". If their status is "Offline," "Busy," or "Away" they will not receive chat requests. When advisors are online, website visitors will see a little green light by their picture.

Website visitors will see this and know an advisor is online and available to chat. Site visitors will only be able to begin a chat session with an advisor if the advisor is logged in AND their status is "Online".



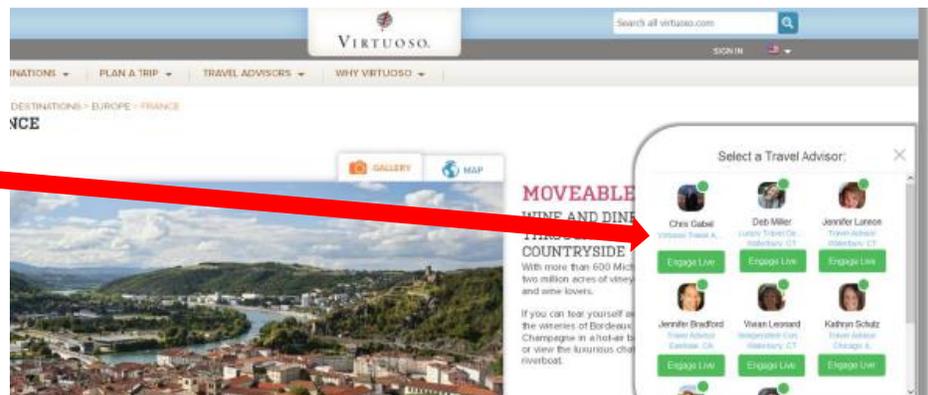
Website visitors will see this bar on the right side of their screen (this bar will be visible on many Virtuoso.com pages, but not on all of them).

Please note that the bar will only show if one or more advisors are online at that time.

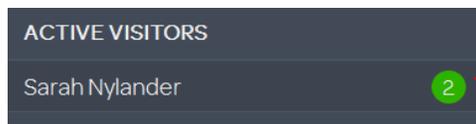


To begin a chat session, a website visitor will click on that bar. Once they click, a pop-out window will show all of the advisors who are online.

The website visitor will then click on the picture of the advisor with whom they wish to chat.

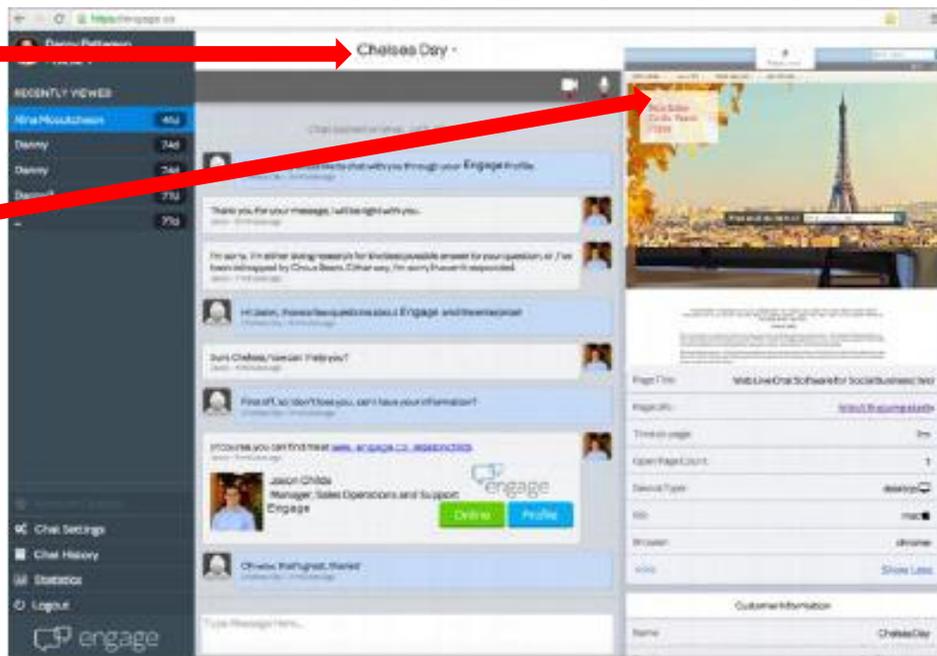


When someone clicks on the picture of an advisor who is online, to begin a chat conversation, that advisor will see a popup in the **lower right corner of their computer screen** with a green flashing light next to the name:



The advisor's **Engage dashboard** will also show a **green flashing alert** next to the name of the website visitor. Advisors may also opt to have an audible notification as well.

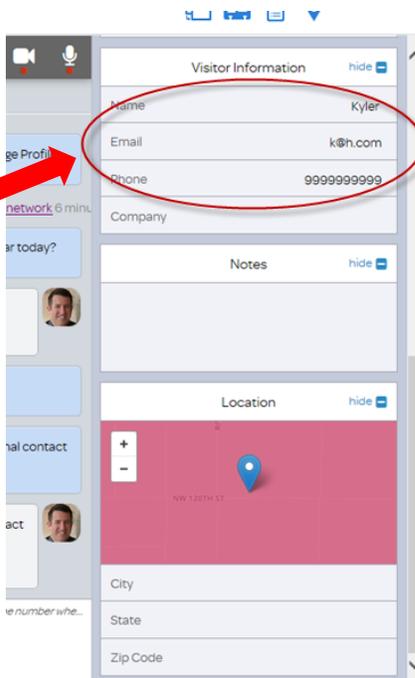
On the advisor's Engage dashboard, their chat window will show who has requested a chat session with them.



If the advisor's dashboard is also showing a picture of the website page and the URL that the visitor is currently on, as well as a list of pages that the website visitor has recently visited on the website – then the advisor will know which website the visitor is coming from. It will not be virtuoso.com. **If the advisor is NOT seeing any of those things in the dashboard, then they will know that the website visitor is coming from virtuoso.com.**

Website visitors will only be required to provide their name, with phone number and email as optional information.

Whatever information they provide is passed through to the advisor and will show in the chat window.



So advisors will definitely see the person's name, and if they entered a phone number or email address, those will also show. And that information is editable, so while an advisor is in the dashboard during a chat, they can edit the person's information as necessary - or enter it if the person didn't provide it initially but it comes up during the chat conversation.

Engage limits the number of chats to one at a time, so if you are chatting with a website visitor, your status will automatically show as "Busy" until you or the consumer ends the chat. If a consumer keeps the chat open, and you do not close the chat, you will continue to show as "Busy", even if you are no longer actively chatting with the consumer.

You can end the chat by clicking on the person's name and then the "End Chat" option.



## CHAT PROCESS

- Advisor receives a notification when a website visitor has requested to chat with them
- Advisor must respond to the person immediately, preferably using the initial chat script, and complete the initial chat conversation
- If the person provides an email address or phone number, then the advisor can update that information in the Engage dashboard as necessary
- Advisor ends the chat using the "End Chat" option, if the consumer has not already ended the chat

## INITIAL CHAT SCRIPT

*Hello and thank you for connecting with me today! Before we begin, have you ever worked with a Virtuoso travel advisor before?*

*If answer is "Yes": I can try to help, and answer some questions for you, but you will need to continue to work with your current travel advisor for making actual travel arrangements. How can I assist you today?*

*If answer is "No": I would be happy to assist you today, what kind of travel interests you?*

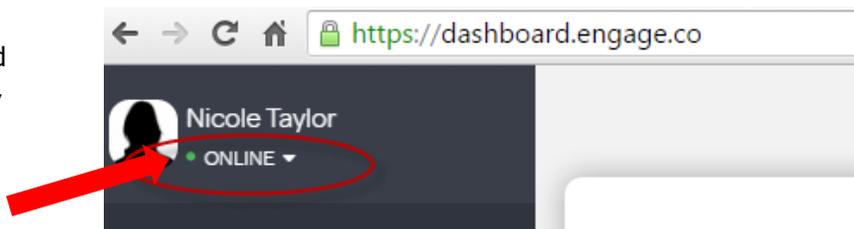
## FREQUENTLY ASKED QUESTIONS

**QUESTION:** How do I log in to get started?

**ANSWER:**

Please visit

<https://dashboard.engage.co> and log in using your email address and password. Once you are logged in, please make sure your status shows as "Online" (in the top left corner of the dashboard), so you will show as available to chat.



**QUESTION:** How will new consumers contact me?

**ANSWER:** When you are showing as "Online", visitors to Virtuoso.com will be able to click on your picture to begin a chat session with you. Then, when you receive the new chat request, you will see a notification pop-up in the lower right corner of your computer screen.

**QUESTION:** Will website visitors be able to contact me when I am logged out of the Engage dashboard?

**ANSWER:** They will not be able to begin a chat session with you unless you are logged in and showing as "Online".

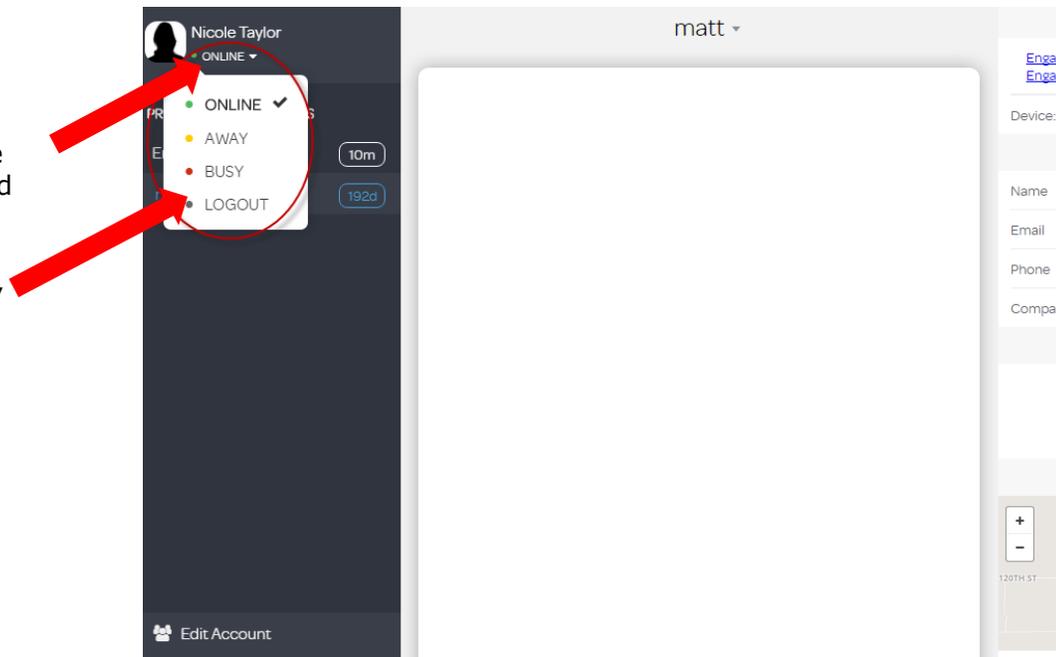
**QUESTION:** What if I chat with a person and then they come back online another day and initiate a new chat session with me?

**ANSWER:** If a website visitor connects with you again for a subsequent chat session and is identified as a repeat (some are not due to security restrictions on their end), there will be a message in the lower right side of your dashboard to let you know that a previous conversation(s) exists. If you click on that message, you can see the previous conversation(s).

**QUESTION:** How do I show as available/not available when I am available/not available?

**ANSWER:**

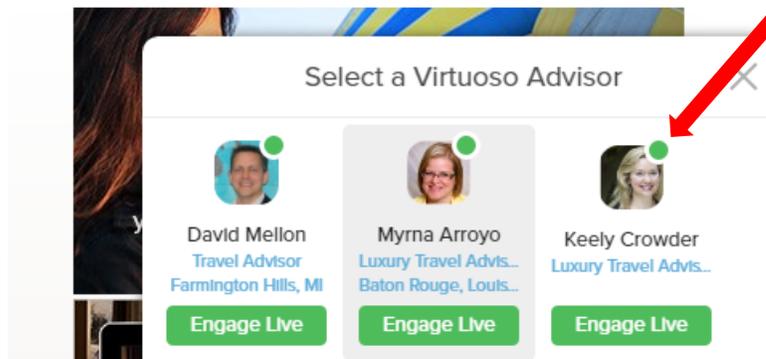
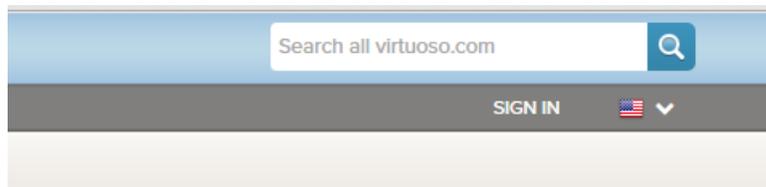
When you log in to the Engage dashboard, (<https://dashboard.engage.co>), you can change your status by clicking the status marker in the top left corner of your dashboard screen.



Then, from the dropdown menu, select the status that applies.

**QUESTION:** How will it look to website visitors when I am available to chat on Virtuoso.com?

**ANSWER:** There will be a green light next to your name in the advisor directory, like this:



**QUESTION:** I have just received a new chat request, what do I do next?

**ANSWER:** Please respond to them immediately (we recommend using the initial chat script) and complete the chat conversation with the person. If they provide their email address or phone number, you may want to update that information in the Engage dashboard as necessary.

**QUESTION:** Do you have some examples of questions a website visitor might ask during a chat session, and how I might answer?

**ANSWER:** Here are some of the most commonly asked questions and answers you can use as is, or tailor to your particular situation or business:

1. **I have never used a travel agent before, what are the benefits?** Great question, I'm so glad you asked it. Within the Virtuoso network we prefer to distinguish ourselves as "advisors or consultants". The typical verbiage of "agent" doesn't accurately encompass all that we deliver for our clients. Unlike the typical "travel agent" stereotype/idea, we create beautifully detailed itineraries - as opposed to pre-planned, mass-market packages. Because of our network, we are able to leverage our exclusive relationships to offer our clients the best experience, amenities and value overall. We are also able to consult and offer insight on the different options, destinations, and recommendations available to our clients. This consulting is only strengthened by the fact that we listen directly to our clients, tailoring travel arrangements to their specific interests and criteria.

Here are some other talking points you may consider when answering this question:

- Our team is made up of experienced travel advisors/consultants who truly advise you on the best options for you and your criteria. Buying travel today is vastly more complicated than it was even five years ago. We help you make the best possible decisions for your needs. We help you make the most of your budget.
- We are part of Virtuoso (a consortium or network of what many consider to be the-best-of-the-best travel agencies). That means, we leverage an extraordinary worldwide network of exclusive relationships with excellent hotels, guides, tours, cruises, and more to offer you the outstanding experiences, amenities, and values for your travel dollars.

**2. Do you charge a fee for your services? OR Why do you charge a fee for your services?** We do charge consulting fees when we design travel plans. In return for this fee, our clients receive the value of our time, knowledge, expertise, worldwide contacts, and exclusive access that is spent in researching, planning and customizing each itinerary we arrange. (Optional depending on advisor/agency: Because we dedicate significant resources and time to each trip that we plan, we ask new clients to provide this nonrefundable planning fee in advance to ensure a mutual commitment.)

Here are some other talking points you may consider when answering this question:

In return for the consulting fees, you benefit from our expertise, time, and contacts; so you can receive exactly what you need such as:

- Saving you valuable time and effort
- A superior travel experience
- Relief, knowing that you are working with a professional who has a team of people to support your travel experience
- Details handled that you don't have to deal with
- Good options and choices within your price ranges
- Values and amenities unavailable to you as an individual

**3. Some agents work for no consulting fee? OR Don't you receive some type of payment or commission from the hotel(s)?** Depending on the vendor or hotel that we are working with, we may receive some level or type of commission - however because we are paid consulting fees, our recommendations/decisions are not dictated by a commission-focused business model. We are instead able to focus our recommendations and consulting efforts towards what is truly best for the specific client and their interest(s).

Here are some other talking points you may consider when answering this question:

- We don't know in advance of planning your travel if the choices best for you include a commission or not. It depends. On the occasions when we do receive modest fees, it helps us keep our fees to you lower than they would be otherwise.
- You are paying us for our knowledge and experience, working out the best options for you.

**4. AMEX (or similar program) offers me the ability to receive certain amenities and rewards? Why shouldn't I just continue to work with them?** Beyond the amenities that the Virtuoso network affords our clients, our clients receive a very different overall experience in working with us. For each interaction you have with AMEX you are connected with a different agent in their call center. Because our clients build a relationship and typically work directly with one advisor or consultant (or "Because as my client you will work directly with me"), we are able to keep in mind your personal preferences and important travel particulars.

**QUESTION:** What should I do if, during a chat, I realize that the person is a supplier/vendor who wants me to use his/her services?

**ANSWER:** Please reply with the following:

*Thank you for connecting with me through Virtuoso.com. As a member agency of Virtuoso, we use Virtuoso suppliers when arranging travel. If you are interested in becoming a Virtuoso supplier, please contact Virtuoso directly at 817-870-0300 or [help@virtuoso.com](mailto:help@virtuoso.com) to inquire about membership requirements.*

**QUESTION:** What should I do if I receive a chat request from another Virtuoso Travel Advisor?

**ANSWER:** Please reply with the following:

*Thank you for connecting with me through Virtuoso.com, I am a Virtuoso Travel Advisor as well. This chat tool is intended for traveling consumers wishing to connect with an Advisor. Please contact Virtuoso directly at 817-870-0300 or [help@virtuoso.com](mailto:help@virtuoso.com) and someone will be able to assist you!*

**QUESTION:** What should I do if I receive a chat request from a non-Virtuoso travel advisor who is trying to get Virtuoso amenities for their client?

**ANSWER:** Please reply with the following:

*Virtuoso amenities are only available to clients who book directly with a Virtuoso advisor, so unfortunately I am unable to assist with your request. If you are interested in becoming a Virtuoso advisor, please contact Virtuoso directly at 817-870-0300 or [help@virtuoso.com](mailto:help@virtuoso.com).*

**QUESTION:** What if someone indicates that they have previously worked with another Virtuoso advisor?

**ANSWER:** Please respond that you can try to help, and answer some questions for them, but let them know that they will need to continue to work with their current advisor for making actual travel arrangements. If they would like their current advisor to be in touch with them, please send their full name, email address and the name of their advisor to [ntaylor@virtuoso.com](mailto:ntaylor@virtuoso.com) and we will get the information to the existing advisor. If they insist on wanting to work with you, however, that is their prerogative.

**QUESTION:** How can I tell which website a new chat request originated from?

**ANSWER:** If your dashboard is showing a picture of the website page and the URL that the customer is currently on, as well as a list of pages that the customer has recently visited on the website – then you will be able to see which website the customer is coming from (and it will not be virtuoso.com). **If you are not seeing any of those things in your dashboard, then you will know that the lead is coming from virtuoso.com.**

Very soon we hope to also be able to show you the customer website page, URL and recently visited pages for customers coming from virtuoso.com.

**QUESTION:** What hours should I be online and available to chat with website visitors?

**ANSWER:** That is entirely up to you, though the more time you spend logged in, the more leads you are likely to receive. Remember also that nights and weekends might be good times to be online, since fewer advisors are likely available, but visitors to the site are still plentiful.

**QUESTION:** When/how will people who engage in chat on Virtuoso.com find out that they must pay a fee for my services?

**ANSWER:** Depending on which Virtuoso.com pages they visited prior to beginning the chat conversation with you, these people may not have read any advisor fee information on Virtuoso.com. If this subject comes up during a chat session, please just handle this with them the same way you would any potential client.

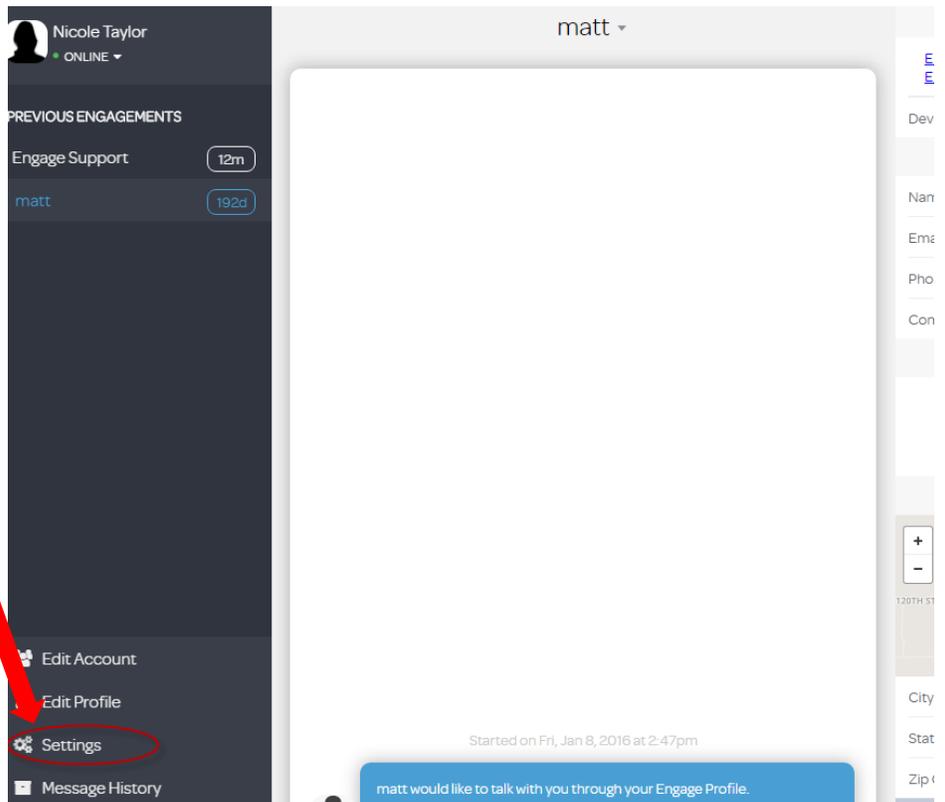
**QUESTION:** How many advisors will show on virtuoso.com at one time? And how do you determine which advisors show at any given time?

**ANSWER:** We can show up to 30 advisors at one time. Only advisors who are online are shown, and advisors who have gone the longest without receiving a chat have priority.

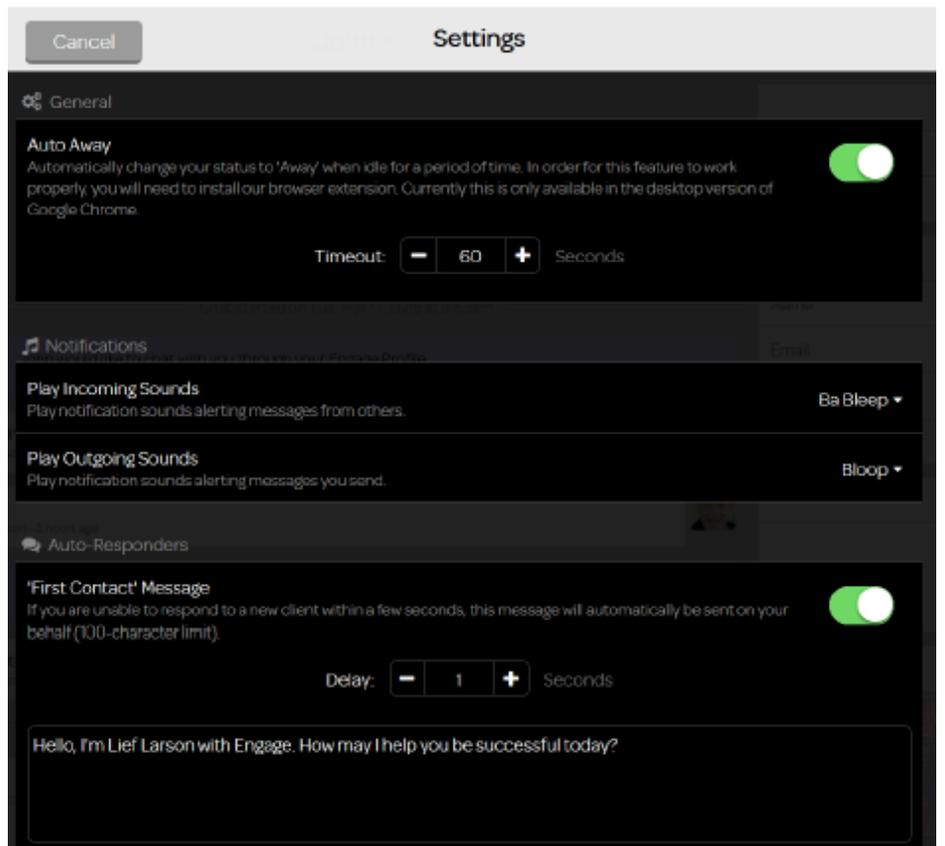
**QUESTION:** How do I set my preferences and settings?

**ANSWER:**

You can do this by going to your dashboard and selecting "Settings" from the menu in the lower left corner.



From this Settings menu you can change things like how you automatically respond to website visitors who engage you in a chat session, how you are notified of incoming chats, and more.



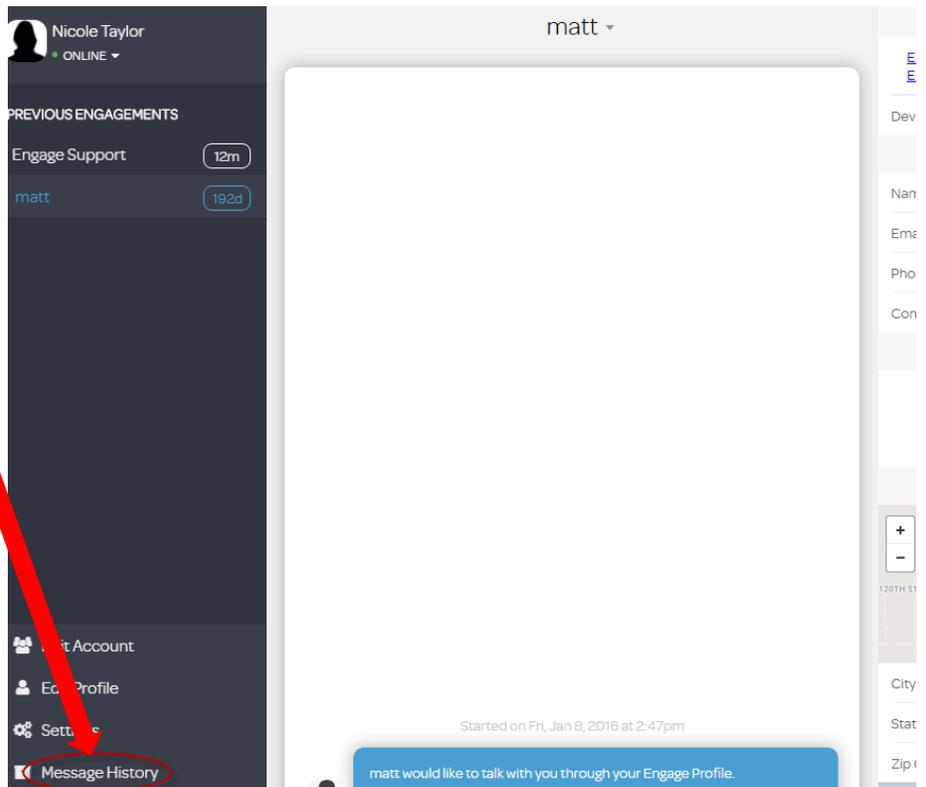
**QUESTION:** How do I retrieve and review my previous chat conversations?

**ANSWER:**

You can do this by going to your dashboard and then selecting "Message History" from the menu in the lower left corner.

Conversations are shown in chronological order. To view a conversation, simply click on that session and the complete conversation dialogue will display.

You may also search by keyword using the search bar in the top right corner of the screen.

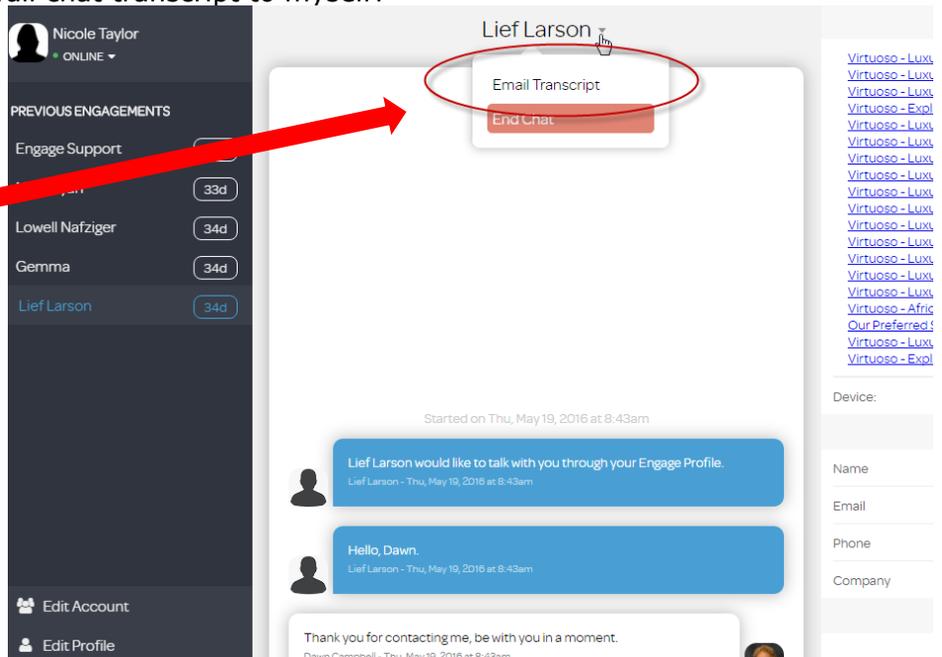


**QUESTION:** How can I email a copy of a full chat transcript to myself?

**ANSWER:**

In your dashboard, pull up the conversation. Now click on the consumer's name at the top of the window to see the dropdown menu. From the dropdown, click on "Email Transcript".

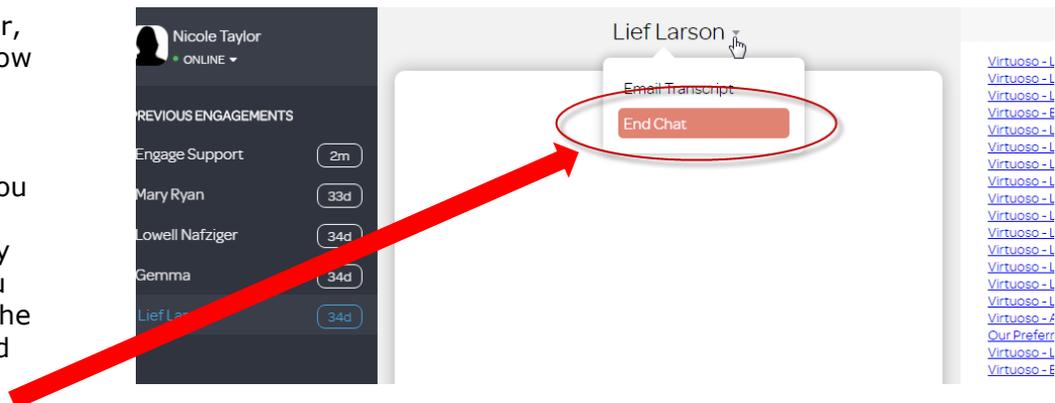
Once you click the button, you will see a message that says that a transcript of this chat has been emailed to your email address. Look in your email inbox to find the transcript.



**QUESTION:** I am having trouble with the "Status" button on my dashboard, sometimes it seems that it has changed on its own after I have set it.

**ANSWER:** If you are in an active chat and you show as "Busy" that's because you're in the chat. It will change when the chat has ended.

Engage also limits the number of chats to one chat at a time, so if you are chatting with a consumer, your status will automatically show as "Busy" until you or the consumer ends the chat. If a consumer keeps the chat open, and you do not close the chat, you will continue to show as "Busy", even if you are no longer actively chatting with the consumer. You can end the chat by clicking on the person's name and then the "End Chat" option.



Also, if you are using the Chrome Engage plug-in and are set to "Auto-Away" in the "Settings" area of your dashboard, your status will be set to "Away" if you are not typing on your computer or moving your mouse. Any interaction with your computer (i.e. keystrokes or mouse movement) will cause your status to then automatically change to "Online". If you prefer, you can disable this in your settings under "Auto-Away", and then manually change your status instead of relying on the automated "Auto Away" feature.

**QUESTION:** Is there a way to eliminate chat spammers who are repeatedly contacting me or connecting with multiple advisors?

**ANSWER:** It is impossible to eliminate the occasional chat spammer. If you find that the spammer is actually harassing or threatening however, you may use the following verbiage:  
*We have collected your IP address and if you continue communications we will turn it over to local law enforcement.*

**QUESTION:** I am an Advisor participating in the Virtuoso.com Chat program. I know that I will show on virtuoso.com and also my agency website, if my agency so chooses. Will I also show on my agency co-branded website or my advisor co-branded website?

**ANSWER:** Advisors will not show on co-branded websites as a chat option, only on virtuoso.com.

**QUESTION:** I would like some hands-on training with the dashboard, how do I make that happen?

**ANSWER:** Engage can assist with this, please email [hello@engage.co](mailto:hello@engage.co)

**QUESTION:** What kind of reporting is available?

**ANSWER:** Some reporting is available through Engage, please email [hello@engage.co](mailto:hello@engage.co) for information.

**QUESTION:** How does an agency sign up to participate in the Virtuoso.com Chat program?

**ANSWER:** Owners/Managers can refer to the Virtuoso.com Chat information page on virtuoso.com for program requirements, then email [ntaylor@virtuoso.com](mailto:ntaylor@virtuoso.com) with a request to participate. This email request should include the names and email addresses of the Lead Gen advisor(s) who wish to participate.

**QUESTION:** How will my agency be charged for the fees associated with this program?

**ANSWER:** Agencies will pay Engage directly for participation in this program.

**QUESTION:** Can I use my Virtuoso Growth Credits to pay the fees associated with the virtuoso.com Chat program?

**ANSWER:** This is not possible because payment is made directly to Engage, not Virtuoso.