



How to Close More Sales with Engage

INTRODUCTION & GUIDE TO LIVE SALES DASHBOARD
POWERED BY:



Lief Larson

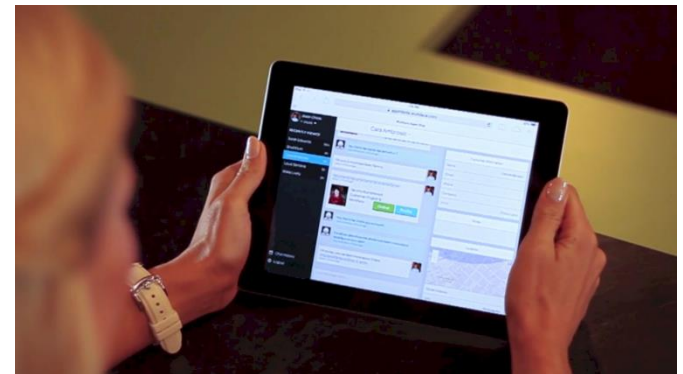
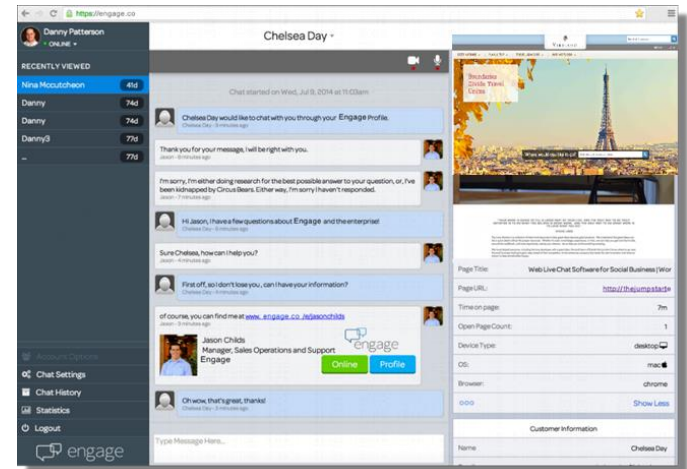


I'm online. Let's talk!

<http://profile.engage.co/lieflarson>

What is Engage?

- Engage is a live messaging solution for communicating and selling in real-time with web customers.
- When you are connected to the Internet and logged into the Engage Dashboard, you will be presented as “online” and available for real-time chatting.
- When a prospective customer clicks to chat with you, you will be alerted to an incoming chat request.



Why Use Engage?

This web-based chat option is not meant to replace the incredible service you already give your prospects and customers.

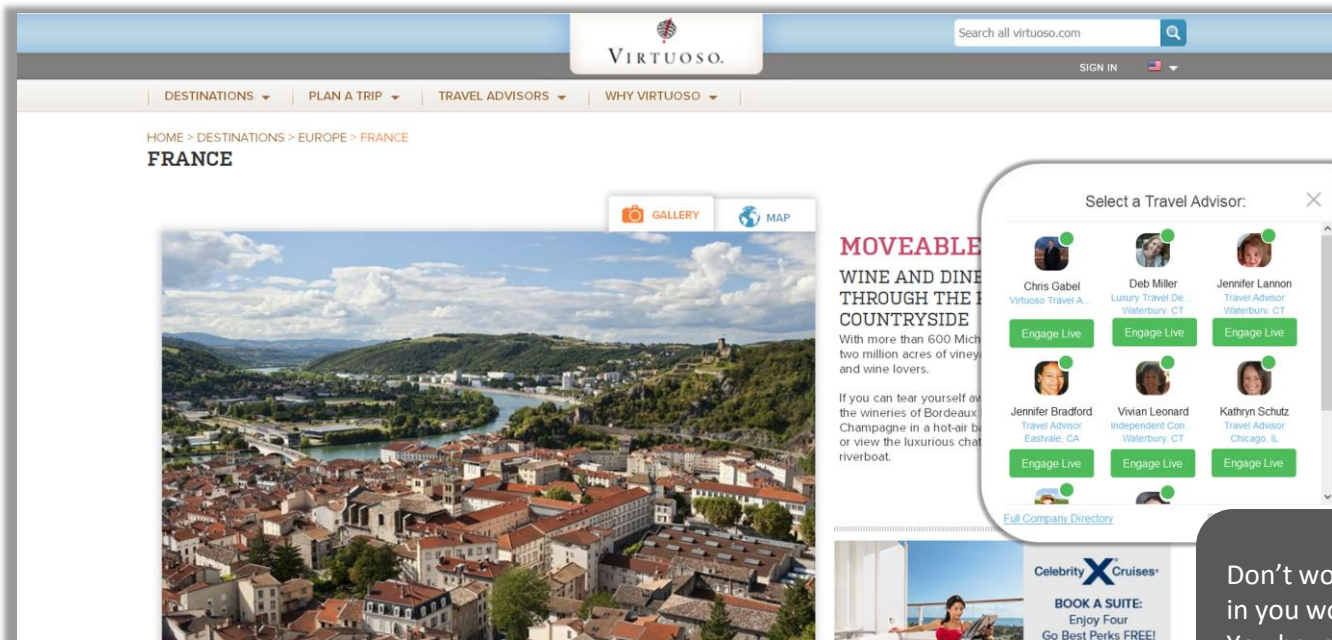
It is simply an additional way for leads to reach out to you as they currently do via phone and email today.

There are a number of compelling reasons why Engage is worth using, including:

- *Receiving new leads from your website*
- *Being able to quickly respond to new lead opportunities*
- *Providing a personal, authentic interaction point for prospects*
- *Improving visitor-to-lead conversion ratios*

How Does Engage Work?

When a lead notices that you're "online" and available to chat they click on the button below your picture and then they are immediately connected to you.



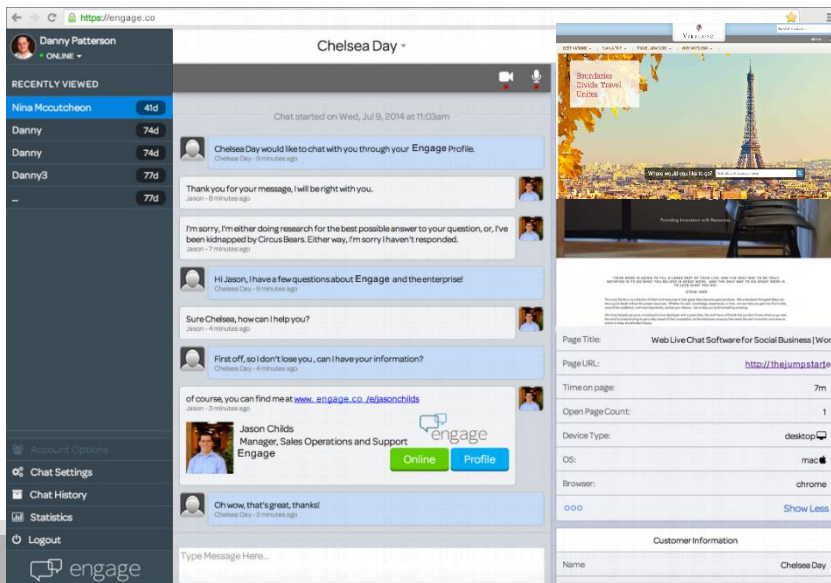
Don't worry, if you're not logged in you won't show as available. You have complete control over when you'll be available to chat.

The Engage Dashboard.

Now it's time to start talking live with leads.

The first step is to log in at <https://dashboard.engage.co>

Once you are logged in, make sure your status shows as "online," so you will show as available to chat.



From your dashboard you can:

- Chat with leads
- See what page they are on
- View a map of where they are physically located
- Get and convert leads, today!

What Happens When You're "Offline"?

When you're in offline mode customers will see a "send message" option. When they send a message, you will receive it at your email address in your normal email program (e.g. Outlook, Gmail, etc.). All you need to do to respond is click "reply" as you would for any email and respond to the lead.



Maria Karmiris
Travel Advisor
Toronto, Ontario

[Send Message](#)



Natallia Khoshchynka
Travel Advisor
Hollywood, FL

[Send Message](#)



Michael King
Travel Advisor
Leawood, KS

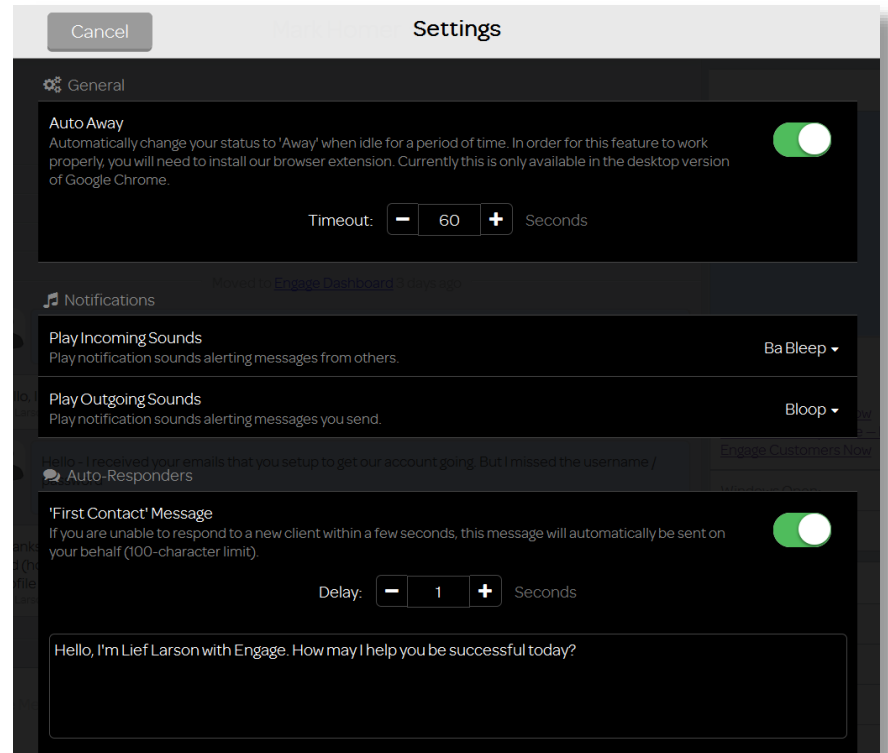
[Send Message](#)

Configure Your Settings

You can configure your setting by opening the “Settings” menu in the lower left hand corner of your dashboard.

From this menu you can modify how Engage works for you such as:

- *how you automatically respond to leads,*
- *change how you are notified of incoming chats,*
- *Set desktop popup and audible alerts, and*
- *change additional settings.*



Please note that although Engage works in all major browsers, it is optimized for Chrome.

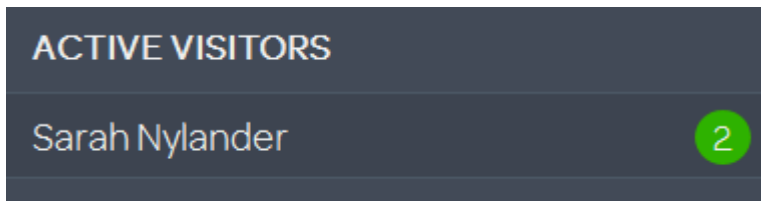
Receiving Messages.

Leads will only be able to begin a chat session with you if you are logged into Engage (<https://dashboard.engage.co>) AND your status is “online”.

If your status is “offline,” “busy,” or “away” you will not receive chat requests.

When you get a new chat request, you will see a desktop popup and the Live Agent Dashboard window will show a green flashing alert next to the name of your customer.

In addition, you can choose to receive an audible alert to new incoming chats.



A green visual alert indicates new chat requests.



New incoming chats are indicated by a desktop popup and an (optional) audible alert.

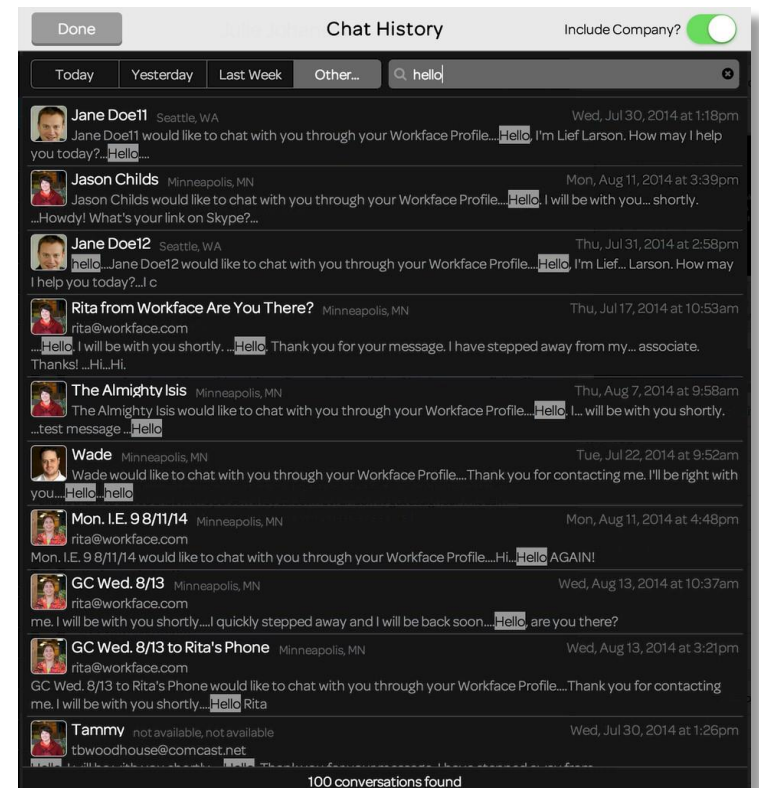
Viewing Historical Message Logs.

You can retrieve and review all previous chat conversations from the Engage menu by selecting “Chat History” located in the lower left hand corner of your dashboard.

Conversations are shown in chronological order.

To view a prior conversation, simply click on that session and the complete conversation dialogue will display.

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



Best Practices.

1. **Start Simple** - One of the beauties of Engage is how easy it is to use. It is nothing more than a new way for you to receive live web-based leads.
2. **Be Available** – The more you are logged in and available, the greater the likelihood of receiving chat requests.
3. **Be Real** – Treat Engage like you would phone or email. Be thoughtful, courteous, and professional in your communications. Let your authenticity shine.
4. **Be Proactive** – Use this opportunity to ask leads questions about themselves and record that information. Engage is a great way to start building meaningful relationships with leads, even if you plan to follow-up with email or phone.

Getting Help.



Engage can assist with technical, usability and best practices questions relating to your use of the service.

Email: hello@engage.co

Or, of course, visit <http://www.engage.co> and talk live with us!