

Conversion Reports

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LIVEPERSON

Introduction

The Conversion reports summarize the activity of the Business Intelligence Engine within the LivePerson solution. The reports provide the most relevant information about current conversion activity (sales, lead generation etc.), which enables customers to gather and analyze data about the effectiveness of chat on their websites.

Using business rules, custom variables that are included with the LivePerson tags on the corresponding web pages, and a conversion specific question in the operator survey, LivePerson collects the information related to visitors' exposure to marketing content and their online conversion activity. The custom variables link specific sales and dollar amounts to each chat interaction, providing a closed-loop.

The data within the Conversion reports provide managers with the information necessary to refine online sales processes to ensure that the right customers have access to qualified operators during the critical moments of the online buying process. Conversion reports measure your invite to chat ratio as well as the exposure and click-through rate of dynamic buttons. For example, if you send an invitation to customers that have been to your site twice in the past week, you can evaluate how many of those invitations resulted in a chat.

Generating the Reports

Administrators use the Admin Console to generate the Conversion reports. The reports can be presented in HTML or Microsoft Excel formats. Before running a Conversion report, you need to define a Report Target by specifying which events you would like to track for each Conversion report.

Defining Report Targets

Report Targets track and aggregate data in the LivePerson database regarding visitor events. You can use a report target only from the time it was defined and it is not available for past data.

To define a report target:

- 1 From the Admin Console, select **Reporting & Analytics > New Reports > Report Targets** tab. The Report Target screen appears, as shown in [Figure 1-1](#).

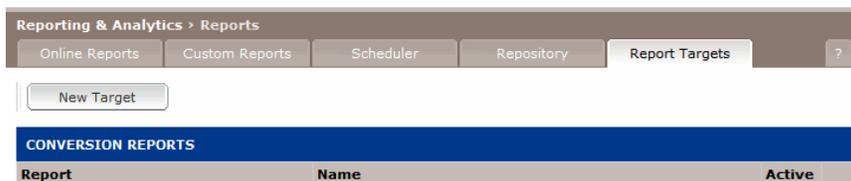


Figure 1-1: *Report Targets Screen*

- 2 Click the **New Target** button. The following screen appears, as shown in [Figure 1-2 on page 3](#).

The screenshot shows the 'Reporting & Analytics > Reports' interface. At the top, there are tabs for 'Online Reports', 'Custom Reports', 'Scheduler', 'Repository', and 'Report Targets'. Below the tabs is a 'View All' button. The main area is titled 'REPORT DEFINITION' and contains a form with the following fields:

- Report:***: A dropdown menu with 'Sales Summary' selected.
- Report Target Name:***: A text input field containing 'Revenue-wine'.
- Visitor Selection:**: A dropdown menu with 'All Visitors' selected.
- Chat Selection:**: A dropdown menu with 'All Chats' selected.

At the bottom of the form are two buttons: 'Submit All Changes' and 'Cancel'.

Figure 1-2: *Report Definition Screen*

- 3 Select the required Conversion report for which you would like to define a report target.
- 4 Enter a name for the report target. This name is displayed in the required Conversion report as a drop-down list in the Online Report tab (see [Figure 1-5 on page 5](#)).
- 5 Enter the name of the custom variable e.g., StartedApplication, ConversionStage or hot-lead. This variable is displayed for the Sales Summary – Customized report only.
- 6 Enter the Match Instruction for the value (string or numeric) of the custom variable. You can specify a specific string or value, or you can use `<numeric>` to accept any numeric value. This parameter is displayed for the "Sales Summary – Customized report" only.
- 7 Select the Visitor Selection criteria to specify the type of visitors included in the report. The Report Target will be generated based on any of the following visitor types:
 - ❖ **All Visitors:** All website visitors to tagged pages (default).
 - ❖ **Room Visitors:** Visitors to specific pages defined by rooms. You can select multiple rooms.
 - ❖ **Rule Qualified Visitors:** Visitors meeting defined rules from the rule engine. You can select multiple rules.
- 8 Select the Chat Selection criteria to specify the level of chat activity that should be included in the report. The Report Target will be generated based on any of the following chat types:
 - ❖ **All Chats:** Chats that resulted from an invitation or button click independent of the interaction (default).
 - ❖ **Interactive Chats:** Chats that included at least one interaction with the visitor. Chats without an interaction are typically factored out of the performance analysis by most Call Centers.

❖ **Qualified Chats:** Chats that were marked as qualified by the operator in the operator survey.

- 9 Click the **Submit All Changes** button. The new report target appears in the Report Targets Screen, as shown in [Figure 1-3 on page 4](#).



The screenshot shows the 'Reporting & Analytics > Reports' interface. At the top, there are navigation tabs: 'Online Reports', 'Custom Reports', 'Scheduler', 'Repository', and 'Report Targets'. Below the tabs is a 'New Target' button. The main content area is titled 'CONVERSION REPORTS' and contains a table with three columns: 'Report', 'Name', and 'Active'. The table lists three reports: 'Sales Summary' with 'Revenue-Cheese' (Active), 'Sales Summary' with 'Revenue-Cheese and Wine' (Inactive), and 'Sales Summary' with 'Revenue-Wine' (Active). Each row has a green dot icon for active status and a trash can icon for deletion.

Report	Name	Active
Sales Summary	Revenue-Cheese	 
Sales Summary	Revenue-Cheese and Wine	 
Sales Summary	Revenue-Wine	 

Figure 1-3: Report Targets Screen - Defined Target

After a Report target is defined, you can deactivate a report target by clicking the green  button, delete a Report Target by clicking the  button, or view the specified parameters by clicking the report link in the Name column.

Note: *If you deactivate a Report Target, you can still use it to produce reports, but new visitor events will no longer be tracked and aggregated. You cannot activate a deactivated Report Target, however you can create a new Report target with the same parameters.*

Running Conversion Reports

The following procedure explains how to run a conversion report from the Online Report tab, but you can also create and run these reports from the Scheduler tab.

To create an online Conversion report:

- 1 From the Admin Console, select **Reporting & Analytics > New Reports > Online Reports** tab. The following screen appears, as shown in [Figure 1-4](#).

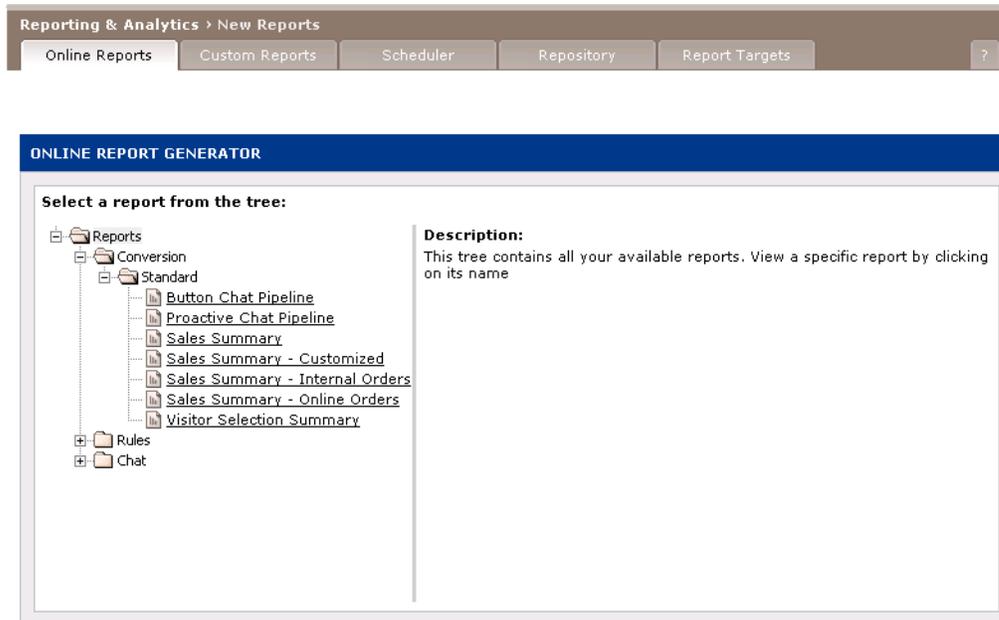


Figure 1-4: *Online Report Generator Screen*

- 2 Click the Required report. The following screen appears, as shown in [Figure 1-5](#).

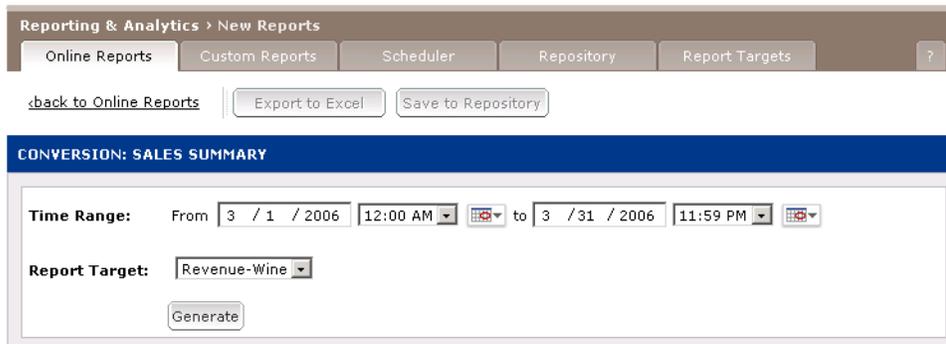


Figure 1-5: *Online Reports Screen*

- 3 Select the Time Range, which includes the start date and end date for the time period of analysis.

- 4 Select the required Report Target.
- 5 Click the **Generate** button. When the Reporting Engine completes the task the report will be displayed.

Understanding Conversion Reports

The Conversion reports enable you to effectively measure the impact that chat has on a visitor's website experience. Each report provides aggregate information on all of the visitors that visited tagged pages during a specified time frame and tracks the result of the interaction. Specifically, Conversion reports help you measure the following:

- ◆ Number of total visitors to a website or to specific sets of pages (rooms).
- ◆ Numbers of visitors that can be classified as Hot or Cold Leads based on behavior patterns.
- ◆ Number of visitors that receive an invitation to chat, and their acceptance and sales conversion rates.
- ◆ Number of visitors that see a dynamic button, and their acceptance and sales conversion rates.
- ◆ Number of visitors that purchase from the website after or during chat with an operator.
- ◆ Rules that trigger higher volume of Hot Lead alerts and generate more chats.

The Sales and Marketing solution includes the following types of Conversion reports:

- ◆ **Pipeline Reports:** Analyzes the visitors' traffic metrics and the impact on chat. See [page 6](#).
- ◆ **Sales Summary Reports:** Summarizes the number of sales and total dollar amounts that resulted from chat interactions. See [page 13](#).
- ◆ **Visitor Selection Report:** Provides information on the number of visitors and chat activity on your site. See [page 20](#).

Pipeline Reports

The Pipeline reports analyze the visitors' traffic metrics and the impact on chat. A pipeline is the entire process through which a visitor moves. For example, a rule presents a dynamic chat button to a particular visitor, the visitor clicks the chat button, a chat starts and the operator determines if the chat is qualified. These reports provide a breakdown for the chat buttons deployed on the website and include traffic metrics such as button activity and impact by rule or outcome. The following metrics are available:

- ◆ **LiveChat Metrics:** Measure visitor exposure to groups of chat buttons and the rate of operator chats.



- ◆ **Rule Metrics:** Indicate the number of times that each rule fires and how many chat-pipeline events occur after a rule fires or an outcome is triggered. The information is summarized by the different possible outcomes of a rule, or the different rules that trigger an outcome.
- ◆ **Site Metrics:** Determine the number of visits to your website.

The following Pipeline reports are available:

- ◆ Button Chat Pipeline Report: See [page 8](#).
- ◆ Proactive Chat Pipeline: See [page 10](#).



LIVEPERSON

Button Chat Pipeline Report

The Button Chat Pipeline report measures visitor exposure to groups of chat buttons and the rate of operator chats, for the selected time frame. Details include: Visitors, Visitors exposed to buttons, Button Clicks (busy, offline and available states), and Button Chats. A total summary for all buttons is provided for the selected time frame. A breakdown is also provided for each button deployed on the web pages. A partial example is displayed in Figure 1-6. The Button Chat pipeline process is as follows:

- 1 Visitor is exposed to a rule-generated Chat button (Button Impression)
- 2 The visitor clicks on the Chat button
- 3 The chat starts
- 4 If the visitor types a message the chat is interactive
- 5 The operator determines if the chat is qualified

Group By Visitor Types															
Visitor Type	Number of Visitors	Percentage of Total	Visitors Exposed to Button	Button Views	Visitors Clicking Button	Offline Clicks	Busy Clicks	Available Clicks	Button Chats	Selected Button Chats	Visitor Exposure Rate (%)	Button Click Rate (%)	Online Click Rate (%)	Button Chat Connection Rate (%)	Selected Chats Rate (%)
Cold Lead	176172	86.24	4846	10195	24	1	0	27	26	26	2.75	0.50	96.43	96.30	100.00
Hot Lead	28100	13.76	2167	4085	291	0	34	295	271	271	7.71	13.43	89.67	91.86	100.00
Total	204272	100.00	7013	14280	315	1	34	322	297	297	3.43	4.49	90.20	92.24	100.00

Group By Days															
Day	Number of Visitors	Visitors Exposed to Button	Button Views	Visitors Clicking Button	Offline Clicks	Busy Clicks	Available Clicks	Button Chats	Selected Button Chats	Visitor Exposure Rate (%)	Button Click Rate (%)	Online Click Rate (%)	Button Chat Connection Rate (%)	Selected Chats Rate (%)	
02/11/2006	12265	844	2056	22	0	1	22	21	21	6.88	2.61	95.65	95.45	0.00	
02/10/2006	40311	1719	3272	66	0	11	69	66	66	4.26	3.84	86.25	95.65	0.00	
02/09/2006	57870	1451	2946	69	1	7	67	62	62	3.58	4.63	89.33	92.54	0.00	
02/08/2006	45935	1378	2907	67	0	7	66	59	59	3.00	4.86	90.41	89.39	0.00	
02/07/2006	28927	1059	2154	60	0	7	66	61	61	3.66	5.67	90.41	92.42	0.00	
02/06/2006	18964	522	945	31	0	1	32	28	28	2.75	5.94	96.97	87.50	0.00	
Total	204272	7013	14280	315	1	34	322	297	297	3.43	4.49	90.20	92.24	0.00	

Group By Button names															
Button name	Visitors Exposed to Button	Button Views	Visitors Clicking Button	Offline Clicks	Busy Clicks	Available Clicks	Button Chats	Selected Button Chats	Visitor Exposure Rate (%)	Button Click Rate (%)	Online Click Rate (%)	Button Chat Connection Rate (%)	Selected Chats Rate (%)		
\$	3817	8427	20	1	0	21	21	21	0.00	0.52	95.45	100.00	100.00		
Contact	1907	2853	295	0	34	301	276	276	0.00	15.47	89.85	91.69	100.00		
MS	1337	3000	0	0	0	0	0	0	0.00	0.00	0.00	0.00	0.00		
International	0	0	0	0	0	0	0	0	0.00	0.00	0.00	0.00	0.00		
Total	7061	14280	315	1	34	322	297	297	0.00	4.46	90.20	92.24	100.00		

Group By Rules															
Rule	Number of Sessions Fired	Number of Times Fired	Visitors Exposed to Button	Button Views	Visitors Clicking Button	Offline Clicks	Busy Clicks	Available Clicks	Button Chats	Selected Button Chats	Visitor Exposure Rate (%)	Button Click Rate (%)	Online Click Rate (%)	Button Chat Connection Rate (%)	Selected Chats Rate (%)
Room Control	159923	159923	7002	14267	314	1	34	321	296	296	3.50	4.48	90.17	92.21	100.00
Account Online	116495	116495	4647	9321	306	0	20	321	296	296	3.99	6.28	94.13	92.21	100.00
L-MBS	98491	98491	1393	2375	160	0	17	160	145	145	1.41	11.49	90.40	90.62	100.00
International visitor	91217	91217	0	0	0	0	0	0	0	0	0.00	0.00	0.00	0.00	0.00
Financial Products	78937	78937	673	1135	94	0	5	96	85	85	0.85	13.97	95.05	88.54	100.00
Hot-Lead	28100	28100	1035	1865	117	0	12	117	108	108	3.68	11.30	90.70	92.31	100.00
Plans	27763	27763	243	429	37	0	2	38	32	32	0.88	15.23	95.00	84.21	100.00
(invite)M	17007	17007	551	987	85	0	1	88	81	81	3.24	15.43	98.08	92.05	100.00
Browsing	9899	9899	179	324	22	0	0	22	22	22	1.01	12.29	100.00	100.00	100.00

Figure 1-6: Example Button Chat Pipeline Report

Term	Definition
<i>Available Clicks</i>	The number of times a visitor clicked on the chat button while operators were available to chat. Multiple clicks by a single visitor are counted multiple times.
<i>Busy Clicks</i>	The number of times a visitor clicked on the chat button while operators were busy. Multiple clicks by a single user are counted multiple times.
<i>Button Chats</i>	The number of chats that were a result of the click-to-chat button.
<i>Button Click Rate</i>	The percentage of visitors that viewed and clicked on a chat button.
<i>Button Views</i>	The number of times visitors were exposed to chat buttons. Multiple views by a single visitor are counted multiple times.
<i>Button Chat Connection Rate</i>	The percentage of available clicks that become button chats.
<i>Number of Sessions Fired</i>	The number of visitor sessions during which a rule fired. Multiple occurrences in a single session are counted once.
<i>Number of Sessions Triggered</i>	The number of visitor sessions during which an outcome was triggered. Multiple occurrences in a single session are counted once.
<i>Number of Visitors</i>	The number of selected visitors (sessions) to tagged pages on your website.
<i>Offline Clicks</i>	The number of times a visitor clicked the chat button while operators were not online.
<i>Online Click Rate</i>	The percentage of Available Clicks relative to Visitors Clicking the chat button.
<i>Percentage of Total</i>	The percentage of Hot or Cold Leads. Hot Leads are visitors that triggered a designated business rule. Cold Leads are visitors who are not Hot Lead visitors.
<i>Selected Button Chats</i>	The number of Button Chats that match the specified selection (all, interactive or qualified chats).
<i>Selected Chats Rate</i>	The percentage of Button Chats that match the selection criteria (all, interactive or qualified chats).
<i>Visitor Exposure Rate</i>	The percentage of total visitors presented with chat buttons.
<i>Visitors Clicking Button</i>	The number of visitors that clicked a chat button.
<i>Visitors Exposed to Button</i>	The number of sessions with visitors exposed to a chat button.



Proactive Chat Pipeline

The Proactive Chat Pipeline report measures visitor traffic activity and proactive (rule-generated invitations) impact on chat. It summarizes visitors' Hot Leads, acceptance rates and chat rates for different time frames and different rule types. Details include: number of visitors, Hot Leads/Cold Leads, rule-generated invitations sent to visitors, invitations accepted or declined, and proactive chats. A partial example is displayed in Figure 1-7. The pipeline details are:

- 1 Visitor qualifies as Hot Lead according to defined rules
- 2 A Proactive (rule-generated) Chat Invitation is presented to the visitor
- 3 The visitor accepts the invitation
- 4 The chat starts
- 5 If the visitor types a message the chat is interactive
- 6 Operator determines if the chat is qualified

RESULTS														
Group By Visitor Types														
Visitor Type	Number of Visitors	Percentage of Total	Invitations (Rule Generated)	Invitations Accepted	Invitations Declined	Invitations Ignored	Proactive Chats	Selected Proactive Chats	Invitation Rate (%)	Invitation Acceptance Rate (%)	Proactive Chat Connection Rate (%)	Selected Chats Rate (%)		
Cold Lead	178460	86.26	1	0	0	1	0	0	0.00	0.00	0.00	0.00		
Hot Lead	28431	13.74	17016	1200	9181	6636	1178	1178	59.85	7.85	98.17	100.00		
Total	206891	100.00	17817	1200	9181	6636	1178	1178	59.85	7.85	98.17	100.00		
Legend														
Group By Days														
Day	Number of Visitors	Hot Leads	Invitations (Rule Generated)	Invitations Accepted	Invitations Declined	Invitations Ignored	Proactive Chats	Selected Proactive Chats	Hot Lead Rate (%)	Invitation Rate (%)	Invitation Acceptance Rate (%)	Proactive Chat Connection Rate (%)	Selected Chats Rate (%)	
02/12/2006	1718	228	0	0	0	0	0	0	13.27	0.00	0.00	0.00	0.00	
02/11/2006	10067	1055	209	12	124	73	12	12	10.48	19.81	5.74	100.00	100.00	
02/10/2006	36809	5519	2444	198	1358	888	195	195	14.99	44.28	8.10	98.48	100.00	
02/09/2006	57535	9144	5247	320	2766	2161	314	314	15.89	57.38	6.10	98.12	100.00	
02/08/2006	49027	6885	5124	315	2707	2102	306	306	14.04	74.42	6.15	97.14	100.00	
02/07/2006	28929	3243	2164	208	1208	748	204	204	11.21	66.73	9.61	98.08	100.00	
02/06/2006	22806	2357	1829	147	1018	664	147	147	10.33	77.60	8.04	100.00	100.00	
Total	206891	28431	17817	1200	9181	6636	1178	1178	13.74	59.85	7.85	98.17	100.00	
Legend														
Group By Day of Weeks														
Day of Week	Number of Visitors	Hot Leads	Invitations (Rule Generated)	Invitations Accepted	Invitations Declined	Invitations Ignored	Proactive Chats	Selected Proactive Chats	Hot Lead Rate (%)	Invitation Rate (%)	Invitation Acceptance Rate (%)	Proactive Chat Connection Rate (%)	Selected Chats Rate (%)	
THU	57535	9144	5247	320	2766	2161	314	314	15.89	57.38	6.10	98.12	100.00	
WED	49027	6885	5124	315	2707	2102	306	306	14.04	74.42	6.15	97.14	100.00	
FRI	36809	5519	2444	198	1358	888	195	195	14.99	44.28	8.10	98.48	100.00	
TUE	28929	3243	2164	208	1208	748	204	204	11.21	66.73	9.61	98.08	100.00	
MON	22806	2357	1829	147	1018	664	147	147	10.33	77.60	8.04	100.00	100.00	
SAT	10067	1055	209	12	124	73	12	12	10.48	19.81	5.74	100.00	100.00	
SUN	1718	228	0	0	0	0	0	0	13.27	0.00	0.00	0.00	0.00	
Total	206891	28431	17817	1200	9181	6636	1178	1178	13.74	59.85	7.85	98.17	100.00	
Legend														
Group By Rules														
Rule	Number of Sessions Fired	Number of Times Fired	Hot Leads	Invitations (Rule Generated)	Invitations Accepted	Invitations Declined	Invitations Ignored	Proactive Chats	Selected Proactive Chats	Hot Lead Rate (%)	Invitation Rate (%)	Invitation Acceptance Rate (%)	Proactive Chat Connection Rate (%)	Selected Chats Rate (%)
Room Control	202454	202463	28431	17672	1200	9181	7291	1178	1178	14.04	62.16	6.79	98.17	100.00
Account Online	116495	116504	18622	17671	1200	9181	7290	1178	1178	15.99	94.89	6.79	98.17	100.00

Figure 1-7: Proactive Chat Pipeline Report

Term	Definition
<i>Hot Lead Rate</i>	The percentage of visitors that are Hot Leads.
<i>Hot Leads</i>	The number of Hot Leads on your site. Hot Leads are visitors that trigger a business rule. Cold Leads are visitors that do not trigger a business rule.
<i>Invitation Acceptance Rate</i>	The percentage of invited visitors that accepted a proactive invitation.
<i>Invitation Rate</i>	The percentage of visitors that are sent a proactive invitation. (This may include re-invitations and multiple invitations per user.)
<i>Invitations Accepted</i>	The number of proactive invitations that were accepted by visitors.
<i>Invitations Declined</i>	The number of proactive invitations that were declined by visitors.
<i>Invitations Ignored</i>	The number of proactive invitations that timed out or were ignored by visitors.
<i>Invitations (Rule Generated)</i>	The number of proactive invitations sent.
<i>Number of Sessions Fired</i>	The number of visitor sessions during which a rule fired. Multiple occurrences in a single session are counted once.
<i>Number of Times Fired</i>	The number of times a rule fired. Multiple occurrences in a single session are counted multiple times.
<i>Number of Sessions Triggered</i>	The number of visitor sessions during which an outcome was triggered. Multiple occurrences in a single session are counted once.
<i>Number of Times Triggered</i>	The number of times an outcome was triggered. Multiple occurrences in a single session are counted multiple times.
<i>Number of Visitors</i>	The number of visitors (sessions) to tagged pages on your website.
<i>Percentage of Total</i>	The percentage of Hot or Cold leads out of all selected visitors.
<i>Proactive Chats</i>	The number of accepted proactive (rule-generated) invitations that become actual chats (does not count chat transfers).
<i>Proactive Chat Connection Rate</i>	The percentage of accepted proactive (rule-generated) invitations that become chats. This does not include visitors who abandon before starting a chat with an agent.
<i>Selected Chats Rate</i>	The percentage of chats that met the selection criteria. A selected chat can include All Chats, Selected Chats, or Qualified Chats.
<i>Selected Proactive Chats</i>	The number of chats that met the selection criteria. A selected chat includes all chats, selected chats, or qualified chats.

Sales Summary Reports

The Sales Summary reports summarize the number of sales and total dollar amounts that resulted from chat interactions. If custom variables are deployed, these reports can summarize and compare chat related sales and self-service sales activities. If custom variables are *not* deployed, these reports use the information gathered from the operator survey.

The Sales Summary reports uses the value of the `orderTotal` custom variable (when deployed) to indicate an online sale with the specified amount, in addition to the value of the operator-survey question (`chat_value`) to indicate a sale that was executed by the operator using an internal system. The following Sales Summary reports are available:

- ◆ Sales Summary: See [page 14](#).
- ◆ Sales Summary – Online Orders: See [page 17](#).
- ◆ Sales Summary – Internal Orders: See [page 18](#).
- ◆ Sales Summary – Customized: See [page 19](#).



Sales Summary

The Sales Summary report provides the number of sales and revenue from all sales generated during proactive-chats, button-chats and self-service activities. A partial example is displayed in Figure 1-8.

RESULTS																
Group By Visitor Types																
Visitor Type	No. of Visitors	Percentage of Total	No. Proactive Chats	No. Proactive Sales	\$ Proactive Sales	No. Proactive Sales per Chat	\$ Proactive Sales per Chat	No. Button Chats	No. Button Sales	\$ Button Sales	No. Button Sales per Chat	\$ Button Sales per Chat	No. Self-Serve Visits	No. Self-Serve Sales	\$ Self-Serve Sales	No. Self-Serve Sales per Visit
Cold Lead	17040	96.26	0	0	0.00	0.00	0.00	26	0	0.00	0.00	0.00	17024	0	0.00	0.00
Hot Lead	28431	15.74	1178	38	1209591.00	0.03	1026.82	271	8	60200.00	0.03	222.14	26959	0	0.00	0.00
Total	268891	100.00	1178	38	1209591.00	0.03	1026.82	297	8	60200.00	0.03	202.65	285178	0	0.00	0.00
Group By Days																
Day	No. of Visitors	No. Proactive Chats	No. Proactive Sales	\$ Proactive Sales	No. Proactive Sales per Chat	\$ Proactive Sales per Chat	No. Button Chats	No. Button Sales	\$ Button Sales	No. Button Sales per Chat	\$ Button Sales per Chat	No. Self-Serve Visits	No. Self-Serve Sales	\$ Self-Serve Sales	No. Self-Serve Sales per Visit	
02/12/2006	1718	0	0	0.00	0.00	0.00	0	0	0.00	0.00	0.00	1718	0	0.00	0.00	
02/13/2006	10067	12	0	0.00	0.00	0.00	9	0	0.00	0.00	0.00	10042	0	0.00	0.00	
02/16/2006	36809	198	8	71720.00	0.04	367.79	57	1	850.00	0.02	14.91	36509	0	0.00	0.00	
02/20/2006	97838	314	10	890749.00	0.03	2936.78	68	4	22400.00	0.06	329.41	97102	0	0.00	0.00	
02/28/2006	49027	306	10	199019.00	0.03	650.39	58	2	36100.00	0.03	622.41	48624	0	0.00	0.00	
02/27/2006	28929	204	8	43184.00	0.04	211.69	60	1	850.00	0.02	14.17	28621	0	0.00	0.00	
02/09/2006	22006	147	2	4919.00	0.01	32.46	45	0	0.00	0.00	0.00	22562	0	0.00	0.00	
Total	268891	1178	38	1209591.00	0.03	1026.82	297	8	60200.00	0.03	202.65	285178	0	0.00	0.00	
Group By Day of Weeks																
Day of Week	No. of Visitors	No. Proactive Chats	No. Proactive Sales	\$ Proactive Sales	No. Proactive Sales per Chat	\$ Proactive Sales per Chat	No. Button Chats	No. Button Sales	\$ Button Sales	No. Button Sales per Chat	\$ Button Sales per Chat	No. Self-Serve Visits	No. Self-Serve Sales	\$ Self-Serve Sales	No. Self-Serve Sales per Visit	
THU	17535	314	10	890749.00	0.03	2936.78	68	4	22400.00	0.06	329.41	97102	0	0.00	0.00	
WED	49027	306	10	199019.00	0.03	650.39	58	2	36100.00	0.03	622.41	48624	0	0.00	0.00	
FRI	36809	198	8	71720.00	0.04	367.79	57	1	850.00	0.02	14.91	36509	0	0.00	0.00	
TUE	28929	204	8	43184.00	0.04	211.69	60	1	850.00	0.02	14.17	28621	0	0.00	0.00	
MON	22006	147	2	4919.00	0.01	32.46	45	0	0.00	0.00	0.00	22562	0	0.00	0.00	
SAT	10067	12	0	0.00	0.00	0.00	9	0	0.00	0.00	0.00	10042	0	0.00	0.00	
SUN	1718	0	0	0.00	0.00	0.00	0	0	0.00	0.00	0.00	1718	0	0.00	0.00	
Total	268891	1178	38	1209591.00	0.03	1026.82	297	8	60200.00	0.03	202.65	285178	0	0.00	0.00	
Group By Rules																
Rule	Number of Sessions Filled	Number of Times Filled	No. Proactive Chats	No. Proactive Sales	\$ Proactive Sales	No. Proactive Sales per Chat	\$ Proactive Sales per Chat	No. Button Chats	No. Button Sales	\$ Button Sales	No. Button Sales per Chat	\$ Button Sales per Chat	No. Self-Serve Visits	No. Self-Serve Sales	\$ Self-Serve Sales	No. Self-Serve Sales per Visit
Room Control	202454	202454	1178	38	1209591.00	0.03	1026.82	296	8	60200.00	0.03	202.38	209907	0	0.00	0.00
Account Online	116495	116495	1178	38	1209591.00	0.03	1026.82	296	8	60200.00	0.03	202.38	114600	0	0.00	0.00

Figure 1-8: Example Sales Summary Report

Term	Definition
No. Button Chats	The number of selected Button Chats where an operator and visitor are connected.
No. Button Sales	The number of sales from selected Button Chats.
No. Button Sales per Chat	The ratio of Button Chats that result in a sale.
No. Non Pipeline Chat Sales	The number of chats resulting in sales that met the selection criteria of this report, but were not Proactive Invitation or Dynamic Button chats. Non Pipeline Chats typically include manual invitations sent by the operator or a visitor clicking a static chat button.
No. Non Selected Chat Sales	The number of chats resulting in sales that did not meet the selection criteria of this report. A selected chat includes all chats, selected chats, or qualified chats.
No. Non Selected Chats	The number of chats that did not meet the selection criteria of this report. A selected chat can include All Chats, Selected Chats, or Qualified Chats.

Term	Definition
<i>No. Proactive Chats</i>	The number of chats that resulted from the accepted proactive invitations selected (does not include chat transfers).
<i>No. Proactive Sales</i>	Visitor generated – The number of orders that were placed by the visitor as a result of or in connection with a chat interaction (i.e., the visitor chats with an operator and then places an order). Operator generated – The number of orders that were recorded in the operator survey by an operator, as a result of or in connection with a chat interaction.
<i>No. Proactive Sales per Chat</i>	The percentage of Proactive Chats that result in a sale.
<i>No. Self-Serve Sales</i>	The number of self-service (non-chat) orders.
<i>No. Self-Serve Sales per Visit</i>	The percentage of self-service visitors that result in a sale.
<i>No. Self-Serve Visits</i>	The number of self-service (non-chat) visits.
<i>\$ Button Sales</i>	The dollar amount of sales from selected Button Chats.
<i>\$ Button Sales per Chat</i>	The dollar amount of selected Button Chats that result in a sale.
<i>\$ Non Pipeline Chat Sales</i>	The dollar amount of sales resulting from chats that met the selection criteria of this report, but were not Proactive Invitation or Dynamic Button chats. Non Pipeline Chats typically include manual invitations sent by the operator or a visitor clicking a static chat button.
<i>\$ Non Selected Chat Sales</i>	The dollar amount of sales that did not meet the selection criteria of this report.
<i>\$ Proactive Sales</i>	Visitor generated – The dollar amount of all chat-assisted converted orders placed by visitors themselves (i.e., an invitation was sent to the visitor, the visitor chats with an operator and then the visitor places an order online). Operator generated – The dollar amount of all chat-assisted converted orders reported by chat operators (i.e., an invitation was sent to the visitor, the visitor chats with an operator and the sales results in connection with the chat interaction).
<i>\$ Proactive Sales per Chat</i>	The average dollar amount of Proactive Chats that resulted in a sale.
<i>\$ Self-Serve Sales</i>	The dollar amount of self-service (non-chat) orders.
<i>\$ Self-Serve Sales per Visit</i>	The dollar amount of the average self-service visit. (Total dollar amount of all self-service sales divided by the number of self-service visits.)
<i>No. of Visitors</i>	The number of visitors (sessions) to tagged pages on your website.
<i>Percentage of Total</i>	The percentage of Hot or Cold Leads. Hot Leads are visitors that triggered a designated business rule. Cold Leads are visitors who are not Hot Lead visitors.

Sales Summary – Online Orders

The Sales Summary - Online Orders report provides a sales summary with respect to sales in which the operator helped the visitor complete the order on the self-service web-order forms or shopping cart. This report is based on the `orderTotal` custom variable only. A partial example is displayed in Figure 1-9.

RESULTS																	
Group By Visitor Types																	
Visitor Type	No. of Visitors	Percentage of Total	No. Proactive Chats	No. Proactive Sales	\$ Proactive Sales	No. Proactive Sales per Chat	\$ Proactive Sales per Chat	No. Button Chats	No. Button Sales	\$ Button Sales	No. Button Sales per Chat	\$ Button Sales per Chat	No. Self-Serve Visits	No. Self-Serve Sales	\$ Self-Serve Sales	No. Self-Serve Sales per Visit	\$ Self-Serve Sales per Visit
Cold Lead	19652	95.44	0	0	0.00	0.00	0.00	0	0	0.00	0.00	0.00	19651	77	1992.13	0.00	0.10
Hot Lead	938	4.56	21	4	74.80	0.19	3.56	4	2	44.90	0.50	11.22	913	109	2104.95	0.12	2.31
Total	20590	100.00	21	4	74.80	0.19	3.56	4	2	44.90	0.50	11.22	20564	186	4096.68	0.01	0.20
Legend																	
Group By Days																	
Day	No. of Visitors	No. Proactive Chats	No. Proactive Sales	\$ Proactive Sales	No. Proactive Sales per Chat	\$ Proactive Sales per Chat	No. Button Chats	No. Button Sales	\$ Button Sales	No. Button Sales per Chat	\$ Button Sales per Chat	No. Self-Serve Visits	No. Self-Serve Sales	\$ Self-Serve Sales	No. Self-Serve Sales per Visit	\$ Self-Serve Sales per Visit	
02/02/2008	20590	21	4	74.80	0.19	3.56	4	2	44.90	0.50	11.22	20564	186	4096.68	0.01	0.20	
Total	20590	21	4	74.80	0.19	3.56	4	2	44.90	0.50	11.22	20564	186	4096.68	0.01	0.20	
Legend																	
Group By Rules																	
Rule	Number of Sessions Fired	Number of Times Fired	No. Proactive Chats	No. Proactive Sales	\$ Proactive Sales	No. Proactive Sales per Chat	\$ Proactive Sales per Chat	No. Button Chats	No. Button Sales	\$ Button Sales	No. Button Sales per Chat	\$ Button Sales per Chat	No. Self-Serve Visits	No. Self-Serve Sales	\$ Self-Serve Sales	No. Self-Serve Sales per Visit	\$ Self-Serve Sales per Visit
Set Room	20463	20463	21	4	74.80	0.19	3.56	4	2	44.90	0.50	11.22	20437	185	4058.73	0.00	0.01
group a	13315	13315	11	3	59.85	0.27	5.44	4	2	44.90	0.50	11.22	13299	109	2412.94	0.00	0.01
group b	7085	7085	10	1	14.95	0.10	1.49	0	0	0.00	0.00	0.00	7075	76	1646.19	0.00	0.01
Exclusion - current customer	6150	6150	0	0	0.00	0.00	0.00	0	0	0.00	0.00	0.00	6150	15	922.25	0.00	0.00

Figure 1-9: Sales Summary – Online Orders

Sales Summary – Internal Orders

The Sales Summary – Internal Orders report provides the sales summary with respect to sales that are generated during chat but are recorded by operators on internal applications instead of being processed through the web forms or the shopping cart. The results from the sale are input by the operator into the operator survey. This report is based on the `chat_value` custom variable only. A partial example is displayed in Figure 1-10.

RESULTS												
Group By Visitor Types												
Visitor Type	No. of Visitors	Percentage of Total	No. Proactive Chats	No. Proactive Sales	\$ Proactive Sales	No. Proactive Sales per chat	\$ Proactive Sales per chat	No. Button Chats	No. Button Sales	\$ Button Sales	No. Button Sales per chat	\$ Button Sales per chat
Cold Lead	19652	95.44	0	0	0.00	0.00	0.00	0	0	0.00	0.00	0.00
Hot Lead	938	4.56	21	0	0.00	0.00	0.00	4	0	0.00	0.00	0.00
Total	20590	100.00	21	0	0.00	0.00	0.00	4	0	0.00	0.00	0.00
Legend												
Group By Days												
Day	No. of Visitors	No. Proactive Chats	No. Proactive Sales	\$ Proactive Sales	No. Proactive Sales per chat	\$ Proactive Sales per chat	No. Button Chats	No. Button Sales	\$ Button Sales	No. Button Sales per chat	\$ Button Sales per chat	No. Button Sales per chat
02/03/2006	20590	21	0	0.00	0.00	0.00	4	0	0.00	0.00	0.00	0.00
Total	20590	21	0	0.00	0.00	0.00	4	0	0.00	0.00	0.00	0.00
Legend												
Group By Rules												
Rule	Number of Sessions Fired	Number of Times Fired	No. Proactive Chats	No. Proactive Sales	\$ Proactive Sales	No. Proactive Sales per chat	\$ Proactive Sales per chat	No. Button Chats	No. Button Sales			
Set Room	20463	20463	21	0	0.00	0.00	0.00	4	0			
group a	13315	13315	11	0	0.00	0.00	0.00	4	0			
group b	7085	7085	10	0	0.00	0.00	0.00	0	0			

Figure 1-10: Example Sales Summary – Internal Orders Report

Sales Summary – Customized

Sales Summary – Customized report provides the number of sales and revenue from all sales generated for visitors that have a specified Custom Variable. A partial example is displayed in Figure 1-11.

RESULTS												
Group By Visitor Types												
Visitor Type	No. of Visitors	Percentage of Total	No. Proactive Chats	No. Proactive Sales	\$ Proactive Sales	No. Proactive Sales per Chat	\$ Proactive Sales per Chat	No. Button Chats	No. Button Sales	\$ Button Sales	No. Button Sales per Chat	\$ Button Sales per Chat
Cold Lead	176970	86.25	0	0	0.00	0.00	0.00	26	0	0.00	0.00	0.00
Hot Lead	28203	13.75	1178	37	0.00	0.03	0.00	271	8	0.00	0.03	0.03
Total	205173	100.00	1178	37	0.00	0.03	0.00	297	8	0.00	0.03	0.03
Legend												
Group By Days												
Day	No. of Visitors	No. Proactive Chats	No. Proactive Sales	\$ Proactive Sales	No. Proactive Sales per Chat	\$ Proactive Sales per Chat	No. Button Chats	No. Button Sales	\$ Button Sales	No. Button Sales per Chat	\$ Button Sales per Chat	No. Sales per Visitor
02/11/2006	10067	12	0	0.00	0.00	0.00	9	0	0.00	0.00	0.00	1.00
02/10/2006	36809	195	8	0.00	0.04	0.00	57	1	0.00	0.02	0.00	3.68
02/09/2006	57535	314	9	0.00	0.03	0.00	68	4	0.00	0.06	0.00	5.75
02/08/2006	49027	306	10	0.00	0.03	0.00	58	2	0.00	0.03	0.00	4.90
02/07/2006	28929	204	8	0.00	0.04	0.00	60	1	0.00	0.02	0.00	2.89
02/06/2006	22806	147	2	0.00	0.01	0.00	45	0	0.00	0.00	0.00	2.28
Total	205173	1178	37	0.00	0.03	0.00	297	8	0.00	0.03	0.00	2.05
Legend												
Group By Rules												
Rule	Number of Sessions Fired	Number of Times Fired	No. Proactive Chats	No. Proactive Sales	\$ Proactive Sales	No. Proactive Sales per Chat	\$ Proactive Sales per Chat	No. Button Chats	No. Button Sales	\$ Button Sales	No. Button Sales per Chat	\$ Button Sales per Chat
Room Control	200794	200794	1178	37	0.00	0.03	0.00	296	8	0.00	0.03	0.00
Account Online	116495	116495	1178	37	0.00	0.03	0.00	296	8	0.00	0.03	0.00

Figure 1-11: Sales Summary – Customized

Visitor Selection Summary

The Visitor Selection Summary report provides information on the number of visitors and chat activity on the site.

RESULTS					
Group By Days					
Day ▾	Number of Visitors	Selected Visitors	All Chats	Interactive Chats	Qualified Chats
02/12/2006	1718	1718	0	0	0
02/11/2006	10067	10067	25	22	8
02/10/2006	36809	36809	300	235	104
02/09/2006	57535	57535	433	301	139
02/08/2006	49027	49027	403	280	107
02/07/2006	28929	28929	308	251	97
02/06/2006	22806	22806	244	183	56
Total	206891	206891	1713	1272	511
Legend					
Group By Day of Weeks					
Day of Week	Number of Visitors ▾	Selected Visitors	All Chats	Interactive Chats	Qualified Chats
THU	57535	57535.00	433	301	139
WED	49027	49027.00	403	280	107
FRI	36809	36809.00	300	235	104
TUE	28929	28929.00	308	251	97
MON	22806	22806.00	244	183	56
SAT	10067	10067.00	25	22	8
SUN	1718	1718.00	0	0	0
Total	206891	206891.00	1713	1272	511
Legend					

Figure 1-12: Visitor Selection Report4

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