

# Using Live Chat to Meet Constituent Needs in New Jersey

## *A Digital Service Network Spotlight*

DSN Spotlights are short-form project profiles that feature exciting work happening across our network of digital government practitioners. Spotlights celebrate our members' stories, lift up actionable takeaways for other practitioners, and put the artifacts we host in the DSN Resource Library in context.

### Background

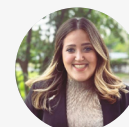
In 2019, the State of New Jersey's Office of Innovation (OOI) launched Business.NJ.gov as a "one-stop" website equipped with self-serve resources to help business owners start, operate, and grow their businesses in New Jersey (NJ). But even after the site's launch, owners often still needed to reach out to multiple state agencies for support, which many [described](#) as "difficult and frustrating."

To tackle this issue, OOI implemented a live chat feature for Business.NJ.gov. Since its launch, the live chat feature has enabled more than [125,000 virtual conversations](#) between business owners and state government experts, and OOI now uses data from the feature's usage to inform how the state delivers business support services and prioritizes content on Business.NJ.gov.

The Beeck Center's Digital Services Network (DSN) spoke with the director of OOI's Business Experience Initiative, E.J. Kalafarski, the director of Business Experience for the State, Jessica Lax, and product manager, Joe DeLaTorre, to learn about Business.NJ.gov's live chat feature.



### Contributing Authors



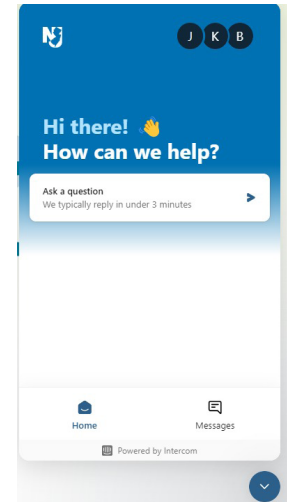
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## The basics of Business.NJ.gov live chat

Business.NJ.gov's live chat tool allows users to interact with about 40 experts and specialists across four state agencies: the Business Action Center, the Economic Development Authority, the Department of Treasury's Division of Taxation, and the Department of Labor's Employer Accounts division.

These experts offer tailored guidance to live chat users to help them start, manage, and grow their businesses.

The staff behind live chat occupy a variety of roles from across NJ state government, including business advocates, taxpayer service representatives, and customer care program managers. Questions are routed based on topic to the appropriate expert, so that the right expertise comes to the user, as opposed to the user having to hunt across the State's bureaucracy for the appropriate guidance.



## Training the live chat experts

The COVID-19 pandemic underscored the need for high-quality, standardized training for live chat staff as the number of chat inquiries rapidly rose. In response, OOI developed a training program to ensure those staffing the Business.NJ.gov live chat feature were equipped to provide a consistent, high-quality experience. The training included basic knowledge of the live chat platform, a common question-and-answer bank, and guidance on how and where to redirect inquiries.

“One of the biggest challenges for OOI was developing the procedures and processes that the live chat customer service reps would follow. Since each representative came with different technological capabilities, we took time to train each of them according to their skill level. Eventually, we implemented tools like saved replies so reps could quickly copy and paste pre-approved responses into the chat to respond to popular questions,” DeLaTorre shared about the training process.

OOI piloted their training model with representatives from the Business Action Center, and, from there, refined and expanded the training to the remaining three agencies. OOI also tailored their training to both full-time and part-time staff who support live chat, ensuring that agency-specific part-time representatives were equipped to add live chat support to their other day-to-day-responsibilities. In tandem with the training, OOI hosted weekly meetings with agencies providing staff for live chat. Based on these meetings, OOI refined its training resources and guidance for the experts providing customer service, often on a daily basis during the pandemic. Refinements to the advice they provided included updates on State- and agency-specific regulations, social distancing requirements, and State financial aid programs available to business owners. These regular meetings gave agencies a direct channel to raise concerns and offered a space to more easily reconcile competing needs.



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**E.J. KALAFARSKI**

Director, New Jersey Office of Innovation's Business Experience Initiative

“Over the course of implementing the training and live chat feature, we learned a tremendous amount about what needs to go into the procedures that the customer service reps follow. One of the biggest lessons was the importance of facilitating coordination between customer service reps and agencies. Bringing people together in a weekly stand up was a great way to tackle technical issues, sharing the latest trends, and answering the kinds of tough questions that can only be solved by putting people’s brains together from an array of disciplines,” Kalafarski said.

## Live chat as a tool for continuous improvement

Early on, OOI saw an opportunity to learn from users’ interactions with the live chat feature to further improve the tool and business services more generally.

OOI collected data from the chats to look for trends in user needs and experiences and shared these trends in an internal report. The report summarized deeper learnings about information gaps on the website and common interests and needs, including specific terminology and phrases used by business owners, tabs they spend the most time on, and common topics of interest. OOI prioritized changes to Business.NJ.gov based on these learnings and eventually recruited a full-time data analyst to strengthen these analytical efforts.



Analyzing the data from the live chat has become crucial to understanding how to improve the site. One of the biggest things that the data indicated is the difference in the language used by business owners compared to the language used by agencies. We could write whatever we want on this site, but if owners aren’t searching for it using the same terms we use, we’ve lost them.”

**JESSICA LAX**

Director of Business Experience, State of New Jersey

“Analyzing the data from the live chat has become crucial to understanding how to improve the site. One of the biggest things that the data indicated is the difference in the language used by business owners compared to the language used by agencies. We could write whatever we want on this site, but if owners aren’t searching for it using the same terms we use, we’ve lost them. Live chat data helped us unify the terms used by the agencies and business owners,” Lax shared.

As the team recognized the potential for live chat data as a quality improvement tool, they improved their data-collection processes to surface stronger insights. DeLaTorre shared that OOI supported live chat representatives in tagging conversations. “This allowed us to understand the topics that needed further attention and iteratively improve the site to decrease the number of questions we receive around that topic,” he said.

Analyzing live chat data also opened the door to implementing a chatbot to ease the burden on staff for common user needs. The chatbot was also crucial to ensuring users consistently received the most up-to-date information as rules and regulations rapidly shifted during COVID-19.

## What's next for Business.NJ.gov live chat?

OOI is looking for opportunities to use artificial intelligence (AI) to more efficiently identify trends in live chat usage data and help connect users to the best representative to help them meet their needs. "Since the chat collects a ton of data points, it's very time consuming to review and evaluate. So we're hoping to deepen our usage of generative AI this year to support some of that process evaluation and improvement," Lax shared.

### Lessons learned

**Responding to constituent needs is a dynamic, ever-evolving process.** It may be necessary to implement a suite of offerings to adequately meet constituent needs as part of a holistic, human-centered approach to service delivery. For example, a human-centered website overhaul may meet the needs of many. But for those with more narrow or specific needs and challenges, more tailored support may be necessary. Complementary tooling or services, like a live chat, can be implemented over time to address a larger cross-section of needs.

**High quality, standardized training is an essential element of a live chat program.** Piloting, refining, and deploying a training program will ensure that the people behind live chat have the updated information and guidance for the program to evolve successfully. It is a reminder that the human side of technology cannot be overlooked when deploying digital solutions.

**Public-facing digital tools can, themselves, become a key source of knowledge to continuously improve service delivery.** While not a replacement for deep, in-person engagements, data from digital tools like Business.NJ.gov's live chat feature can be a rich source of information to support updates to service delivery to better meet constituent needs. These data sources can also be used to help prioritize issues that may benefit from more resource-intensive, human-centered research, like surveys, interviews, focus groups, or ride-alongs. Hiring analysts whose time is focused on surfacing insights from these data can be well worth the investment.