



# Oracle Co-browse Best Practices

Planning Ahead to Ensure an Optimal Co-browsing Experience for Both Agents and Customers

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Oracle Co-browse is a collaboration tool that can be used during voice or chat interactions to enable a company representative to see the screen of the customer that he's interacting with in real-time. This allows agents to better understand a customer's question or problem, and provide faster and more accurate help, leading to better resolutions and more satisfied customers.

Today, more and more businesses are moving processes and critical business applications to the Web. Many large organizations have multiple customer-facing websites as well as mobile applications to serve different audiences and business segments. All too often, customers or end-users can get lost in complicated websites and can grow frustrated or just give-up. This can have a negative impact on customer satisfaction, adoption of the internet channel, and the ability to profitably serve customers.

Ensuring success of end-users on web and mobile platforms has become critical to business success, and collaborative tools such as co-browsing software have become must-haves. Co-browsing is used to engage customers online and provide real-time assisted service or guidance when necessary, which increases customer satisfaction and online conversions. In many cases, a customer and an agent can resolve an issue quicker, with a greater level of understanding and satisfaction, by viewing the same content.

Co-browsing is an indispensable sales conversion and customer support tool that drives business objectives as well as revenue. This document will cover five of the most effective best practices to consider when planning, deploying and using a co-browsing solution, along with ways to measure its success.



## Best Practice #1: Clearly Define Goals and Measurement Methodologies

Co-browsing has the potential to significantly improve many of the key performance indicators important to your organization. The first step in adding any new channel to your customer experience is to clearly define the business problem you want to solve and the associated success criteria. It is important that all stakeholders agree on a common set of objectives and measurements, and that this information be clearly communicated.

Some of the most common success metrics targeted by businesses related to co-browsing include:

- » **Sales Conversion Rate:** Co-browsing allows agents to co-shop with customers, recommend products or services and effectively cross-sell, up-sell and increase order size. Measuring conversion rates pre- and post-co-browse deployment, and analyzing the conversion rates on interactions during which co-browsing was utilized are important steps for measuring against this goal.
- » **First Call Resolution Rate:** By assisting with complex or confusing web forms or other processes that would be too difficult to simply describe verbally, co-browsing significantly impacts first call resolution rates. Many companies segment call or chat types to further understand customer issues. In this case it is helpful to assign FCR improvement goals to call or chat types for which co-browsing would be a complement (e.g., website navigation calls or order completion calls) vs. call types where co-browsing would not be utilized (e.g., basic company inquiries, status inquiries, etc.).
- » **Customer Satisfaction:** The ability to be “on the same page” has been shown to significantly reduce customer frustration, leading to satisfaction rate improvements. Many companies choose to display customer satisfaction surveys at the close of every co-browsing session due to the engaged nature of the interaction.
- » **Online Self-Service:** By co-browsing to guide a customer through new or a complex web tools, companies can drive towards an increase in online self-service usage. Beyond standard systems for measuring adoption of self-service tools, simple surveys conducted at the close of a co-browse session can provide insight into whether or not a customer is comfortable and/or confident about using self-service tools or performing an action on his own moving forward.
- » **Call Handling Time:** Co-browsing may shorten call handling times when the issues are web or mobile-based and highly complex. As with First Call Resolution, even better insights are gained when measuring specific types of calls or chats where handling time is currently an issue. Co-browsing isn't appropriate or necessary for every call, but for complex and involved call types, measuring the handling time when co-browsing is utilized versus interactions that rely entirely on voice or chat guidance can provide a clear picture of how co-browse technology is impacting contact center costs.

As a best practice, co-browsing sessions should close with the launch of surveys to capture feedback from both customers and agents, and, where possible, should integrate with the existing company CRM and analytics systems.

## Best Practice #2: Design a Simple, Brand-Aligned Customer Experience

Customer-centricity is particularly important when planning co-browsing initiatives. Any time a new customer-facing capability is added to your sales or service toolset, it should reflect your corporate branding and be integrated into your workflow as tightly as possible, giving customers a seamless transition to the new channel. Customizing the co-browsing launch to reflect your logo, brand colors and verbiage sets expectations and provides reassurance to your customers.

One of the most important steps, in deploying Co-browse successfully, is careful planning around the customer launch point and User Interface (UI). Oracle Service Cloud has developed a set of best practices around launch point strategy that are proven to optimize usage of the co-browse tool.

Starting a co-browse session requires that customers click a launch button, referred to as the Co-browse Launcher. The Co-browse Launcher can be displayed and designed in a multitude of ways, similar to the many ways Live Chat can be presented on a website: as a link, a button, or an icon. The Launcher can be highly visible on a Web page, or it can be placed conspicuously in a footer menu. It can be visible on every page of a website, or just on a few specific pages.

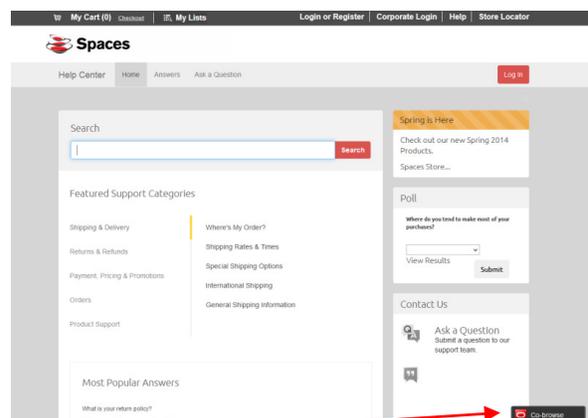
To underscore the importance of a well thought out launch experience, let's examine some of the most common reasons co-browse is used during a service interaction:

- » A **frustrated** customer is experiencing a problem on the website
- » A customer **can't find** what they need on the site on their own
- » A **less tech-savvy customer** is having trouble navigating the site or using self-service tools
- » An agent wants to engage a customer **at risk of abandoning** the site before completing a purchase

In all cases, it is mission critical to create a low effort co-browse launch experience that is easy to find, easy to understand/use, and quick to connect. This ensures that co-browsing works as designed, to enhance and expedite the interaction. A poorly designed launch experience can have the opposite effect, causing additional frustration for the customer and agent.

### Button Placement and Visibility

The most successful co-browse deployments utilize a site-wide floating button placement, as is the default configuration of the Oracle Co-browse Launch Point 1 deployment option. This ensures that customers do not have to navigate off the page they are on when they need help. It also eliminates the frustration that can occur when an agent is attempting to direct a customer to a launch point over the phone that requires the customer to navigate to a new page, scroll down to a footer, or look for a link within other site content. Requiring a customer to navigate to a non-obvious location in order to start a co-browse session will increase call handling times, result in abandonment, and add to customer frustration as they are tasked with locating a resource elsewhere on the page or site.



The hovering button style of Oracle Co-browse Launch Point 1 stays visible throughout the customer's visit, remaining in view while the customer scrolls through the page content.



The hovering button can be placed in any location on the page, but most commonly will be set to appear at the bottom right or on the middle of the right or left side of the page. Offset controls enable companies to specify exactly where on the page the Co-browse button should appear.

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***If the Co-browse button is always visible, what will happen when customers click it even if they don't need to co-browse?***

*This is a common concern when companies consider adding a site-wide Co-browse button. By setting up the Co-browse UI to carefully communicate its purpose to customers, curiosity clicks are kept to a minimum. Customers clicking the Co-browse button do not impact any communication channels in the contact center. Co-browse sessions are never active until an agent who is talking to a customer on the phone already and receives and inputs that customer's session ID code into the Co-browse Agent Console. Clicking the button itself does nothing but expand the Co-browse UI to display messaging. It does not initiate a session, connect to an agent, add an incident to a queue or consume web sessions.*

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### **Best Practice #3: Equip Your Agents with Solid Co-browse Training**

To leverage the real-time nature and rich collaboration capabilities of the internet channel, make sure cost reduction isn't your only priority. If your company's self-service web site is confusing or difficult to use, your customer satisfaction ratings, cost of customer care and website usage will all be negatively impacted. Your Company will have added a support expense to your most expensive channel, the agent. It is important to introduce an agent at the right time with the right tools to provide assisted sales or service before a customer grows frustrated or exits your website.

Instead of thinking of co-browsing technology as an expense, consider it a unique opportunity to delight a customer and a great chance to advise the customer about your solutions and up-sell. Co-browsing provides tremendous benefit when a visual connection speeds the transaction and reduces confusion. If a customer is struggling to explain their difficulty to an agent, sharing the screen will quickly eliminate the often difficult and awkward explanation and allow the agent to move immediately to resolution. Similarly, if a customer is struggling to follow the directions of an agent, it is highly effective to share the screen and allow the agent to show the customer exactly where on a website he needs to navigate, enter information or interact in some way.

In a sales situation, co-browsing is best applied as a closing tool for one-on-one interactions. As the customer and transaction value increase and the customer narrows their selections co-browsing and one-on-one interactions are most appropriately applied.

It is important to invite your customers to engage in the right channel at the right point in the buying process and equally as important to train agents to recognize the appropriate times to escalate a phone call or chat session to a co-browsing session. Some common examples are:

Customer interactions that typically benefit from this sort of visual connection include:

- » Making sure the customer can quickly find what they're looking for on a web site
- » Helping a customer through a complex buying decision
- » Filling out complex web forms or applications
- » Helping commercial customers to solve unique problems in a timely manner with immediate personal assistance
- » Collaborating with customers about financial services while mutually viewing account data and graphical information online
- » On-boarding new accounts to web platforms and online services (e.g., online bill pay, online banking)

- » Helping customers find and understand web-based support information for complex products/services
- » Training customers how to utilize new online products or self-service capabilities

Many of these use case scenarios may apply to your business, but it's likely you have other scenarios where Co-browse will provide a benefit. Document your most important use cases in your agent training programs.

An effective agent training and roll-out program for Co-browse will include these elements:

- » Scripting ideas for how to introduce the option to co-browse with a customer (e.g., "Let's co-browse so we can do this together" or "We can use our Co-browse feature so I can show you")
- » Examples of use cases where Co-browse is envisioned as an effective tool, along with guidance that it's not a tool for every call
- » An overview of any security and privacy settings applied to the deployment (e.g., "You won't be able to Co-browse on these pages..." or "You can Co-browse PDF documents, but nothing else on the customer's desktop")
- » Role-playing as part of the training – this is mission-critical to ensure that agents are comfortable and confident in usage of the Co-browse tool
- » A printed tips sheet is an effective roll-out mechanism to cover the basics, like how to start a session, what can and can't be co-browsed, etc.
- » A collaborative roll-out campaign is a great way to bring attention to the tool – encourage agents to share use case stories, circulate these and reward agents willing to be early adopters
- » Agent focus groups early on will help you identify any questions or concerns about the Co-browse tool that can be addressed with updated training
- » Agent surveys are a great way to capture ongoing feedback to enhance training programs
- » Monitor usage reports to identify agents with high usage rates – these are important resources to get feedback from that can be circulated to the full team to encourage usage

## Best Practice #4: Make Sure Your Customers are Comfortable Co-browsing

There are a number of simple things an agent can do to make a customer feel more comfortable with the co-browsing experience.

- » Tell the customer about the new service your company has put in place to let you see the customer screen so you can better assist them.
- » Communicate the security and privacy settings in place (e.g., "I will only be able to see our website in your browser – if you show anything else on your screen, it will be blocked from my view")
- » Use the agent mouse to trigger dynamic pop-ups or drop-downs for the customer. Once the mouse is in the correct position, instruct the customer to click or type where indicated.
- » Communicate with the customer throughout the interaction.
- » Move deliberately if you take control. Teach the customer how to do what you are doing.
- » End the co-browsing session prior to end of the phone or chat interaction.
- » If the agent can help the customer best by actually "doing it for him" and has the appropriate account permissions, he or she can ask the customer to agree to allow the agent to take remote control of his computer.



## Best Practice #5: Optimize Your Co-browse & Chat Experience

There are some considerations specific to co-browsing during a live chat interaction, and some best practices that can help optimize this process to ensure efficiency and a positive customer and agent experience.

Think through the use cases where co-browsing with customers might make sense during a chat interaction and craft clear and concise canned messaging that an agent can use to suggest a Co-browse session. For example, "I could help you better if I could see your screen..." and "Your privacy is extremely important to us. During our screen sharing session, I will only be able to see..."

When co-browsing with a customer, an agent should avoid taking multiple chat interactions. The Co-browse experience requires constant attention from the agent in order for him to see what the customer is doing and work with the customer through a problem or question. Handling multiple chats while co-browsing is difficult and weakens the experience for the co-browsing customer.

Make sure the customer knows that the chat interaction will continue during a co-browsing session. This can be addressed via the canned messaging related to co-browsing, but it's important to ensure that the customer knows to continue communicating via the chat window during a Co-browse session. This will help avoid instances where the customer mistakenly closes the chat window.

Another standard message agents should have available is an alert to the customer that the agent has ended the Co-browse session. This should always be done and confirmed before the chat session is ended. Customers also have the ability to end a Co-browse session at any time, but to ensure a positive experience it's important to communicate to the customer that his or her screen is no longer visible.

## Best Practice #6: Promote Co-browse as a Service Enhancement

Leaders in their industries are moving screen sharing and co-browsing from the traditional realm of "computer tech support" to branded online customer sales and service tools, particularly in the e-retailing and financial services industries. A positive and differentiated user experience is one of the most important drivers of online customer loyalty. The advantage of enhancing online customer sales and service that can be achieved by adding co-browse capabilities to your website can be enhanced by how well and how quickly it is promoted to customers.

- » Market co-browse as a branded and customer friendly service channel on your website to differentiate your service capabilities from the competition
- » Encourage customers to use co-browse during a phone call for quicker issue resolution on complex inquiries or transactions
- » Enhance phone calls for high value customers with co-browse
- » Include a co-browse link on every page of your website so customers can easily initiate a session



## Conclusion

There are three factors that make co-browsing software a must-have for customer facing organizations today. First, customers expect to interact with the majority of their product and service suppliers through a website or mobile app. Website interaction leads to expectations of personalization and efficiency. Second, as customer facing websites become more complex and companies move more business applications and processes to the web, it is critical to engage customers online and provide real-time assistance when they need help. Third, in today's business environment of hyper-competition and product commoditization there is significant pressure to be more efficient while also improving a high quality of customer care.

When deployed with a best practices implementation, co-browsing can deliver an enhanced customer experience, greater operating efficiencies, and more profitable customer relationships.



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