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Best Practices for Co-browse
Launch Point Design and Behavior

June 8, 2015

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Introduction

Co-browsing is a powerful way to provide efficient, accurate and engaging live help when customers are looking for assistance on a website or mobile application. 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.

In this document, we'll outline best practices for creating an optimal customer experience during the launch and connection of a co-browse interaction.

2

Launch Point Styles

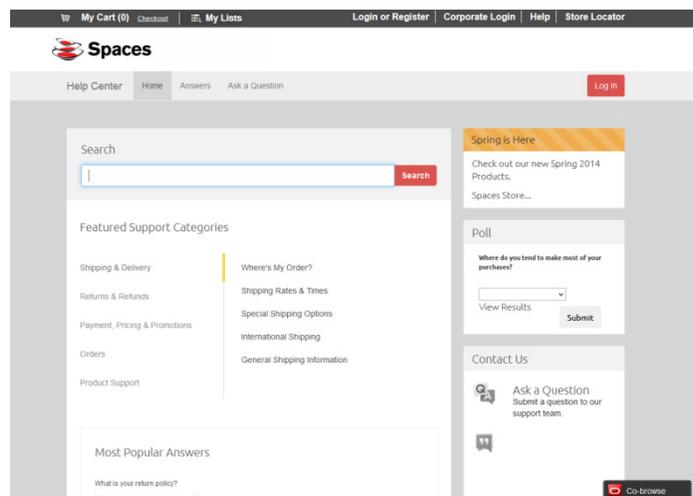
Like Chat, Co-browse launch points can be displayed in many ways and the decision for how to display the launch button is typically impacted by several factors:

- Branding and design
- Customer experience strategy
- Site usability
- Channel strategy

Oracle Co-browse can be launched from two distinct categories of styles, though the launch points for each of these styles can be customized in unlimited ways. We call the two categories **Launch Point 1** and **Launch Point 2**.

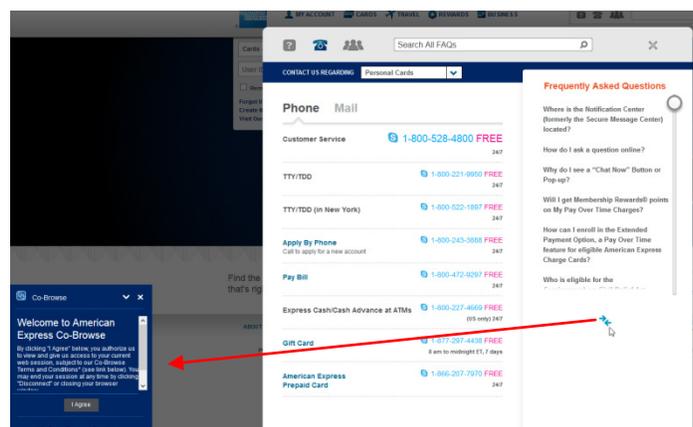
Launch Point 1 (recommended)

Using Launch Point 1, the Co-Browse button will always be visible on the website, in the position specified in the configuration (e.g., top left, bottom right, offset by 100 pts, etc.). Launch Point 1 is the default option; nothing needs to be done to enable it.



Launch Point 2

Using Launch Point 2, the launch button is not automatically visible to customers on the website. The website would have a link or an image button with a unique ID, from which a Co-browse session would launch. That ID would be associated with the Co-browse Launch within the Co-browse Administrative Console.



When a site visitor clicks on the link or image which is configured to be the launch point, the Co-Browse Panel will appear from the location of the link/image and fly to the location which is specified in the configuration (e.g., top-left, bottom-right, offset 100 pts, etc.).

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Launch Point Location

The most successful co-browse deployments utilize a site-wide floating button placement, as is the default configuration of Oracle Co-browse Launch Point 1. 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.

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. And 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 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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Launch Point Visibility

The best practice for launch point visibility is to set the Co-browse button to be visible on every page. However, there are often business reasons why companies do not want a Co-browse button to appear on certain pages. Sometimes certain areas of the website are restricted from co-browsing sessions for customer privacy, and so no Co-browse functionality or launch points are added to those pages. Other times, companies choose to utilize “stealth mode” to hide the launch point on certain pages.

Co-browse launch points can also be strategically located only on certain web pages, such as the Contact Us page or Help page. As with considering the customer experience associated with the launch point location, it is just as important to consider how visibility of the launch button will impact the interaction.

Stealth Mode

Launch Point 1 can be configured in stealth mode in which case the Co-browse button will only appear after the customer hits Ctrl-Enter. Stealth mode is, by default, enabled site-wide. It is most often utilized when companies are in the process of piloting co-browse, as it is not a good user experience to utilize stealth mode for live deployment.

If a Company doesn't want stealth mode for the entire deployment, there is an option to trigger stealth mode on specific urls, hiding the co-browse button just on specified pages.

Delay Timer

Launch Point 1 can also be configured so that the Co-browse button appears with a delay after the web page is loaded. The delay, in seconds, can be configured within the Co-browse Administrative Console.

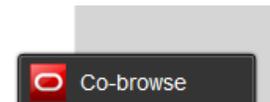
5

Launch UI

There are multiple elements of the Co-browse User Interface that should be configured to optimize the experience of launching a co-browse session.

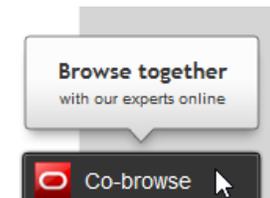
1. Button Text

Most often, companies prefer to label the Co-browse button with the word “Co-browse” which is effective in communicating the purpose of the button, and becomes more so as co-browsing continues to gain popularity as a customer service tool. For an online sales use case, however, companies may choose to label the button “Shop Together” or something that more clearly communicates an assisted shopping purpose. Other options include “Live Help” or “Live Expert.”



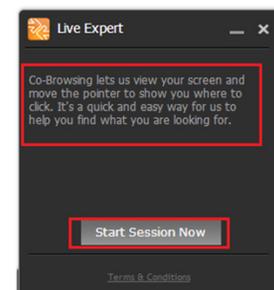
2. Mouse-over Text

On mouse-over, additional information should become visible to help the customer understand the purpose of the button.



3. An optional Terms & Conditions Screen

As a first step when clicking the Co-browse button, many companies prefer to display a Terms & Conditions window with information about what co-browsing is, what the agents can/can't see on the customer's screen, etc. This experience can include a check-box to ensure customers fully understand what the co-browse experience entails.



4. The Expanded Window

In the window that displays the co-browse session ID, even more information can be displayed, including a phone number to make it easy to reach an agent.

