Cobrowse for Customer Engagement: What, Why, and How

Prolog

SCENE 1
Agent: Click on the second item in the menu near the middle of the screen.
Customer: Which menu? There are two of them near the middle.
Agent: It is the one that is titled, Registration.
Customer: The menu items don’t show up.
Agent: You need to hover around the menu title.
On and on...

SCENE 2
Shopper: I can’t find “returns” on your website. I suppose you want to make it difficult for customers to return stuff?
Agent: Go to the XX menu and click on YY. You will see it there.
Shopper: I don’t see it.
Agent: It is on the pop-up.
Shopper: I don’t see any pop-up windows.
Agent: Can you allow pop-ups?
Shopper: How do I do it?
On and on...

Conversations like these between contact center agents and customers are not uncommon. It makes for terrible customer experiences, long handle times, lost productivity, abandoned shopping carts, and lost revenue. Wouldn’t it be great if an agent were able to chat or talk to a customer on the phone as the customer was trying to do things online, whether it is shop, resolve problems, enroll in something, or perform other transactions on a website? After all, more than half of phone calls coming into businesses originate from customers that cannot get their problem resolved or complete their transaction on company websites. Here’s the good news: Cobrowsing, combined with chat or phone conversation, can do just that. Beyond helping the customer with his/her immediate goal, agents could also show the customer how to navigate the website and get things done in the future—in other words, “teach them how to fish,” which is what today’s digital customers want to do anyway!
Cobrowse can transform

According to Forrester, cobrowse leads all other interaction channels with a customer satisfaction rating of 78%! Beyond creating the “wow” effect in CX, cobrowse can also deliver eye-popping benefits for the customer (dramatic reduction in customer effort, improved speed to goal, etc.) and the business (reduction in average handle times, improvement in customer onboarding/new customer acquisition, better customer satisfaction, etc.). Here are ROI examples from our clientele:

- Insurance giant saw a 200% increase in customer onboarding with cobrowse-aided form-filling, combined with concurrent phone conversation
- Health insurance BPO enrolled tens of thousands of consumers in the Affordable Care Act program during open enrollment by cobrowsing health insurance exchanges with consumers and helping them pick plans
- Leading etailer achieved a 5% increase in online conversion with multimodal chat and cobrowse, complemented by contextual offers

Look for the real thing

There is some confusion about the various types of real-time web collaboration about what they do and they can’t. Here are some common ones:

Page pushing: Page pushing allows sales and service agents to push web links or force the customer’s browser on to a particular page. However, page pushing isn’t two-way collaboration—it is one-way information push from the agent to the customer.

Screen sharing: While screen sharing might work for demos, webinars and the like, it’s not a true two-way collaboration tool. The contact center agent or the presenter takes control of the customer’s desktop, screen updates are slow, and moreover, field-level privacy is not even an option—the agent will see all the customer data. They require time-consuming downloads, not the recipe for good CX. Moreover, consumers are very leery of allowing downloads and letting an agent take control of their computer or device in a customer service/engagement scenario.

True cobrowse, “the real thing”: True cobrowsing allows either party to control navigation, share cursor location, and collaborate on both sides (co-filling online forms, for example), allowing both users to enter and edit information while preserving data privacy and controlling who can do what. For example, rules can be applied to prevent agents from viewing the customer’s personal information such as the social security or credit card number. As an additional layer of protection, such solutions can also be configured to prevent agents from submitting forms or completing transactions on the customer’s behalf to keep the customer totally in control. Moreover, cutting-edge cobrowse solutions do not require client-side downloads, and can help increase customer adoption.

Do it right

- While technology is critical to success, best practices are equally important. Partner with a solution provider that can guide you to quick value with deep domain expertise.
Cobrowse is only part of the customer journey. Digital customers like “step-up” or “step-down” chat, where they are able to seamlessly switch across various modes of chat with context: automated or virtual assistant chat, text chat, video chat, cobrowse, etc., along with click-to-call. Make sure you go with an omnichannel customer engagement hub that not only unifies the aforementioned modes of digital collaboration but also other touchpoints like email, voice, etc. The last thing you want to create is yet another silo in cobrowse.

Cobrowse is a high-touch interaction. It therefore makes sense to offer it to the right customer at the right time on the right page. Examples include authenticated customers that are high-value, customers or prospects whose shopping cart has exceeded a certain value, users stuck on a particular page or transaction.

Make sure your agents have access to knowledge to be able to answer customer questions as they chat or cobrowse. Cobrowsing without answers is like driving without a GPS, which will create journeys to nowhere.

In regulated industries, it is also important to be able to store cobrowse and other customer interactions for compliance.

With proven best practices to complement technology, you can leverage cobrowse to go from blah to wow in CX!

**Epilog**

Customer (on the phone or chat): I am already on your website. I can’t find answers and I am having problems with the enrollment form.

Agent: Click on the “cobrowse” button on your screen and give me the code.

Customer: Here’s the code XYZ.

Agent (after starting a cobrowse session with the customer’s code): OK, let me co-navigate with you. Here’s how you get to the answer for your question. Now, I’ll open up the form and we can fill it together. I won’t be able to see your private info and I won’t be able to submit the form or pull the transaction trigger. So don’t worry!

Customer: Great, let’s do it together. (After the interaction is complete) Thanks, that was a great experience. I am going to tweet about it and I am going to buy other products from you.

Agent: Great and have a good day!

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eGain customer engagement solutions power digital transformation for leading brands. Our top-rated cloud applications for social, mobile, web, and contact centers help clients deliver connected customer journeys in an omnichannel world. To find out more about eGain, visit http://www.egain.com/.

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