Chat and Cobrowse Customer Service That Pays Off

8 Foolproof Steps to Success
Chat, cobrowse, and other web collaboration tools have unmatched potential for improving customer service and increasing revenues.

Financial services, retail, telecom, and travel companies were early adopters of these technologies. Savvy businesses in these sectors have been successfully using web collaboration tools to attract, win, and keep customers. As with other technology, chat and cobrowse tools deliver the promised pay-off only if you use them right. In this paper, we describe an eight-step plan to help businesses deploy chat and cobrowse well and use them to create unique and truly satisfying online customer experiences.

Step 1: Know your playing field

Research can make or break your project. Obvious as it may seem, this crucial step is often either unknown to businesses or skipped in the rush to deploy. It is even more important in the context of chat and cobrowse initiatives because a key goal for most such efforts is to provide differentiated service. To set new standards, you need to know:

- Current and emerging trends in your market
- What your competition is doing
- What your customers want

Smart research is a uniquely enabling factor. Not only does it help you define requirements well, it also makes the rest of the deployment easier. You'll find yourself constantly using the insights gleaned at this stage.
Know your market

Be proactive. Harness the power of new technologies instead of playing catch-up. The Web is here to stay, and organizations that have proactively embraced new web-based channels for interacting with customers are earning greater customer satisfaction at reduced costs.

Read about web collaboration trends and success stories. Keep in mind though that industry “best practices” may not always translate into “best practices” for your own operation.

Know your competition

You can’t beat the competition if you don’t know it. Visit their websites to see if they offer chat and cobrowse. Collect details such as:

- Is the chat available to all users? Or is it provided only on certain pages or only to premium customers? Is it available only in business hours?
- Are you proactively offered the option to chat with an agent? At which points; is it when you have been on a page for a certain amount of time?
- How long is the wait time in the chat queue? How do they engage waiting customers?
- How “informed” do the agents appear? Do their responses have typos? Do they cobrowse pages, share files, and use multimedia resources to help you? Was the chat transferred to another agent if needed?
- Are you offered help while filling forms or checking out your shopping cart?
- Do they offer cobrowse? If they do, is it available in all sections of the website?
- Are transcripts of the chat and cobrowse sessions emailed to you?
- What is the typical length of sessions?
- Do the chat and cobrowse solutions seem technically robust? Do sessions get disrupted for technical reasons?

This exercise also gives you a chance to see things the way customers would. Make sure to note what makes you go “Wow!” and what is plain annoying.

Know your customer

Customer-centricity is particularly important in the context of chat and cobrowse initiatives. To use the real-time nature and rich collaboration capabilities of this channel, make sure cost reduction isn’t your only priority. Instead of thinking of a chat as an expense, look at it as a unique opportunity to delight a customer and a great chance to advise the customer about your solutions and upsell. Think win/
win—what’s good for your customer is good for you too (we discuss the importance of customer-centric metrics later in this paper).

Find out interaction channel preferences of your customers and the overall market segment you are targeting. Given the huge adoption of mobile devices, it’s good to get a sense of which ones are popular among your customers. Conduct a web survey to gain this insight—some email management solutions include good web survey capabilities.

It is also important to note language preferences. Does your contact center serve a global customer base? Do you need interaction tools with multilingual capabilities?

Step 2: Create a deployment road map

Businesses often jump into technology evaluation and selection even before they have decided on the business goals of an initiative or the metrics for success. If you don’t know what you want out of an endeavor, your chances of success are not very good! Clarity of purpose, shared goals, and customer-oriented metrics distinguish world-class contact centers. What is your organization’s mission? Do your web collaboration goals match the company’s business goals for the next 12 to 24 months?

A road map ensures that every purchase fits into the larger picture. In fact, businesses can no longer afford to implement interaction channel silos because customers expect to move from one channel to another seamlessly, often in the course of the same interaction. Consider building a customer engagement hub (CEH), which is the most cost-effective way of providing consistent omnichannel engagement. In a CEH, resources such as customer information, interaction history, and knowledge are shared by all channels. Smart contact centers begin with a detailed blueprint of a customer engagement hub, and then add channels and tools one by one, according to plan—building on the success of rapid, incremental enhancements.

Evaluate your existing resources, identify gaps, and prioritize needs. Work out the order in which to implement web collaboration capabilities such as click-to-chat, proactive chat, automated chat through chatbots, click-to-call, cobrowse, and proactive cobrowse. Make sure that every tool you invest in works with the other tools that you have and those that you plan to buy. Document and review your multichannel process for interaction management. Even if you decide not to make sweeping changes in your contact center processes, you will get a sense of the gaps. Then create a phased plan, prioritized
by ROI, risk, and team capabilities. A staged implementation is prudent and increases the odds of success.

Step 3: Choose the right solution

Not all web collaboration tools are created equal. Only consider proven solutions trusted and used by companies known for service excellence. ***It’s an omnichannel world;*** make the effort to find vendors who have a suite of best-of-breed products and especially those who are known for innovation. Look for

1. **Flexible and proven deployment options:** Seek vendors who have a proven track record of delivering mission-critical deployments both in the cloud or onsite and also offer the ability to seamlessly migrate from one to the other. Also make sure the cobrowse deployment doesn’t include extensive canvassing of your website—that can burn up a lot of time and effort! A well-architected cobrowse solution should be deployable in minutes.

2. **Omnichannel and integration-friendly products:** The ability to integrate with self-service, email, phone, and other interaction channels to implement a unified customer engagement hub is a must for creating good customer experiences. Also, ask for out-of-the box integration with backend data, content systems, call center infrastructure, and business systems.

3. **Robust queue and workflow capabilities:** The product should have sophisticated queue management features as they are particularly important in the context of real-time interactions. Also look for features that help you keep customers engaged while they are waiting for an agent to become available. Another requirement is a robust workflow engine that facilitates trackable collaboration with other people, teams, and departments for responsive service and SLA management.

4. **Unified agent desktop:** Common case and knowledge management infrastructure for all channels is critical. Agents should have access to complete customer interaction history, including social interactions. The knowledge base of common responses should be easy to create, use, and maintain.
5. **Multichat capability**: An agent workspace that allows multiple simultaneous chats makes the economics of chat interactions even more compelling. Multichat should always be deployed with care to prevent poor customer experiences. Customers should not be able to sense that an agent is chatting with more than one customer at a time.

6. **Rich engagement options**: You should be looking for a lot more than the ability to exchange text messages! Chat tools should provide the ability to format messages (even add emoticons), share files, and push pages. Tools like eGain Chat™ offer the ability to chat with a chatbot, cobrowse, view FAQ, ask for a callback, and even an end-of-chat survey. And make sure it works on popular mobile browsers. Also look for the ability to email the chat transcript to the customer along with links to information shared in the session, and store the transcript in the customer interaction history.

7. **“True” cobrowse capability**: Look for true cobrowse capability as opposed to technologies such as page-pushing and screen-sharing which do not allow two-way collaboration and granular control of access to and visibility of data on the screen. True cobrowse enables collaborative tasks such as form-filling and online shopping with business rules to hide sensitive information such as credit card numbers from agents. Make sure the cobrowse technology is robust and does not fail on web pages with complex layouts and forms. URL-pushing products frequently encounter problems such as double form submissions, frame breaking, and cookie synchronization. It’s equally important that the customer does not need to install anything on their computers to be able to cobrowse. Also, the tool should offer cobrowsing while on the phone as well as in chat sessions.

8. **Proactive chat and cobrowse facility**: You are likely to need a lot more than simple proactive chat. A product such as eGain Offers™ provides proactive rules as a platform feature. As a result, businesses can proactively offer all engagement options and content already available on their websites on the basis of targeting or personalization rules. The product also comes with A/B testing capabilities.

9. **Analytics**: A comprehensive set of monitoring and reporting tools is a must. We recommend unified omnichannel analytics.

10. **Multilingual support**: Ability to handle multilingual content, if you interact with customers in multiple languages, is another thing to look for.

Don’t get stuck with an unscalable application—there are many of those in the market. No web collaboration is better than unreliable and error-prone web collaboration, and offering web customer service that does not work is a guaranteed recipe for customer defections.
Step 4: Start small, and start smart

It’s a good idea to start with a limited rollout, and expand as you work out the kinks and get your agents trained with the chat and cobrowsing tools. Identify easy-to-implement options that get you the most bang for the buck.

You want to provide the best service to your best customers. Some companies offer chat and cobrowse only to their most profitable or the most valuable customers (depending on however “value” is defined) while nudging other customers to use channels like self-service.

You could consider placing the chat button only in specific places at first, best behind a login-restricted area. If you put it immediately on the first page or all over your website, you might get more chat requests than agents can handle at first. Worst would be if you didn’t design and scale your infrastructure to deal with the volume and the service fails. This frustrates your customer and your agents. Mature products offer A/B testing as well as the ability to gauge the volume of proactive engagement with the help of “ghost” offers.

Importantly, avoid forcing customers to download or install software. Downloads, especially these days with a constant flood of new viruses and worms, scare customers away. You might as well not offer the service.

Step 5: Set up your agents for success

As chat and cobrowse are realtime engagement tools, agent effectiveness and productivity are important concerns. Real-time written interactions, often as part of more than one session at a time, make unique demands on agents. The ability to multitask is very important. Here are some other guidelines.

- **Blend with care:** If you plan to blend channels and have agents answer phone calls as well as live chat and cobrowse requests, integrate with your CTI system and ACD to extend the phone-routing logic to collaboration channels. If your agents answer chat and phone requests, don’t use the multichat feature, instead ask them to work on emails or faxes during idle times.

- **Allow transfers and conferences:** Getting the right agent to handle the chat is important. Offer transfer and conferencing capabilities during chat sessions to ensure that the customer’s query is resolved efficiently. Supervisors and experts should be able to whisper information to agents during chat sessions.
Define a backup activity for agents: As you might do in a phone call center, provide a backup activity for idle time, such as replying to emails. Of course, you should train agents on using the email tool before deploying them for the task.

Use multichat, but only up to a point: Experience with our customers shows that productivity goes up and cost advantages over traditional phone support become more compelling if an agent handles two or more sessions simultaneously. The time lag between typing, sending, and receiving messages allows agents to effectively conduct multiple sessions simultaneously. Five seems to be the limit, and three a best practice. As cobrowse requires more attention than simple chat, limit simultaneous sessions to two when agents are cobrowsing.

Arm agents with knowledge: A good and easily accessible knowledge base can help reduce both training and response times significantly. New hires, with the help of the knowledge base, become effective immediately. Encourage agents to contribute their favorite responses to the knowledge base. Set up a simple approval workflow to make contributed responses available to other agents. A spelling checker is a must, as is a black-listing capability to prevent agents from typing certain words. The ability to bookmark pages on your website is also useful.

Deflect long-lived, complex interactions to the email channel: You don’t want agents to be stuck in protracted and inefficient chat or cobrowsing sessions.

Step 6: Watch like a hawk

Monitoring is very critical for all real-time engagement channels. In fact, do not deploy until you have tested your solution’s volume and quality monitoring features. Here are some tips.

- Make sure your solution has good load-balancing capabilities.
- Provide backup resources for peak times, e.g., provide an overflow chat queue.
- Offer alternative engagement options to customers while they are waiting for the agent. Assure them that they won’t lose their position in the queue if they do so. Also, encourage customers to first try self-service or email before chatting.
Restrict chat to premium customers instead of making customers wait. The memory of a poor customer experience is hard to erase.

Get supervisors to silently monitor, even interact with agents, while chats are in progress. Allow customers to save the chat transcripts, or email it to them for evaluation.

Observe customer experiences with cobrowsing carefully. Ensure that your solution works with the various kinds of pages on your website. Customers report frequent page crashes with cobrowsing tools that are not very robust.

**Step 7: Measure, refine, measure**

Treat web collaboration like any other support channel: Set goals, define metrics, track, and report on those. Contact centers tend to trip on false metrics by blindly following industry “best practices.” For instance, average chat handle time is a common metric for contact center efficiency. However, research has shown that pushing agents to reduce average handle time will often make them ignore valuable cross-sell and upsell opportunities!

- Reinforce customer-centricity with customer-centric metrics.
- Choose metrics that balance each other. No single metric can completely capture the intent of the business. For example, remember to measure customer satisfaction as you monitor chat volume.
- Make sure you are talking to your customers. Surveys and feedback tools should be part of every initiative.
- Refine chat and cobrowsing capabilities based on reports and customer feedback.
- Make sure to compare new results with the older ones to see how effective the changes were.

**Step 8: Get the word out**

The success of any chat and cobrowse on your website depends on how well you market it to your customers. Test the capability initially by offering it to a small segment of your customers on high-value sections of your website. Typically,
eBusinesses will start out by putting chat assistance in the checkout area of their sites.

Once you have ironed out the kinks in the chat service, you should aggressively market the new engagement channel to increase sales conversion on your website. A differentiated website experience is one of the most important drivers of online customer loyalty.

- Include a live help link in outgoing email letters and promotional offers.
- Offer chat invitations while engaging with customers through social media channels.
- Promote chat and cobrowse as an “in band” service capability on your website; position your offering as more customer friendly against your competition. Customers love the idea of getting help as they browse. They don't want to pick up the phone unless they have to. Nor are they keen to search and browse a site to find answers when they are ready to checkout with their shopping cart. Chat and cobrowse, when done right, have a measurable positive impact on shopping cart abandonment rates.
- Encourage customers to use chat instead of the phone channel for faster resolutions during peak traffic. Multichat would typically be less expensive than phone calls for your business. Use IVR recordings to encourage customers to try the chat channel on your website when phone hold times increase beyond accepted SLA.
- Combine web cobrowsing with phone calls for high value customers. Innovative financial services companies have already begun to offer multimedia interactions (phone conversations enhanced with web cobrowsing, also offered directly from the website through a click-to-call button) to premium customers. It improves customer loyalty and allows your agents to leverage the power of your website.

A final word

The potential of chat and cobrowse engagement is immense both for the business and its customers. It is a unique channel that offers the savings of other web-based channels along with the richness of real-time engagement channels. It can transform what typically is a quiet window shopping experience on the web to an interactive, memorable one.

To find out more about how to benefit from this channel, visit our website at www.egain.com to chat with an eGain expert.
Next steps

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