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Chat and Cobrowse Customer Service that Pays Off

8 Foolproof Steps to Success

Chat and cobrowse tools, often referred to as “web collaboration technology,” have unmatched potential for improving customer service and increasing revenues. Financial services, retail, telecom, and travel companies are early adopters of this technology. Savvy businesses in these sectors are using chat and cobrowse 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 eight somewhat uncommon but foolproof steps to help businesses use chat and cobrowse to maximize the value of interactions in all phases of the customer life cycle.

- ▶ Step 1: Know your playing field
- ▶ Step 2: Create a road map
- ▶ Step 3: Choose the right solution
- ▶ Step 4: Start small, and start smart
- ▶ Step 5: Set up your agents for success
- ▶ Step 6: Watch like a hawk
- ▶ Step 7: Measure, refine, measure
- ▶ Step 8: Get the word out

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
- ▶ 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 insights gained 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 contact centers that have proactively embraced new web-based channels for interacting with customers are earning greater customer satisfaction at reduced costs.

Read about chat and cobrowse 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:

- ▶ How many of your competitors offer chat on their websites? Do they offer cobrowse as well?
- ▶ Is the chat and cobrowse option freely 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 long do the chat sessions last?

- ▶ 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?
- ▶ Are transcripts of the chat sessions emailed to you?
- ▶ Do the chat and cobrowse solutions seem technically robust? Do sessions get disrupted for technical reasons?

This exercise also gives you the customer’s perspective in a way. 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 realtime 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, also 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. For instance, Forrester’s *Consumer Technographics 2004 North American Benchmark Study* revealed that chat was predominantly used by males under the age of 34 and that its usage was consistent low among customers over the age of 60, both female and male. Conduct a web survey to gain this insight—some email response 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 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 remote! 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 interaction hub (CIH), which is the most cost-effective way of providing consistent multichannel interactions. In a CIH, 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 interaction 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. 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. Look for:

1. Flexible and proven deployment options. Seek vendors who have a proven track record of delivering mission-critical deployments both in in-house or on-demand hosted modes and also offer the ability to seamlessly migrate from one to the other.
2. The ability to integrate with self-service, email, phone, and other interaction channels, and backend data and content systems to implement a unified customer interaction hub. Also, ask for out-of-the box integration with call center and business systems.
3. A robust workflow engine that facilitates trackable collaboration with other people, teams and departments for responsive service and SLA management.

4. Common case and knowledge management infrastructure for all channels. Agents should get access to complete customer interaction history. The knowledge base of common responses should be easy to create, use, and maintain.
5. An agent workspace that allows multiple simultaneous chats, which makes the economics of chat interactions even more compelling.
6. Ability to share files and cobrowse web pages, even complex ones, with customers. The facility to help customers fill forms through cobrowsing, with business rules to hide sensitive information such as credit card numbers from agents. Get a robust proxy-based cobrowsing tool because simple URL-based cobrowsing fails on web pages with complex layouts and forms. URL-pushing products frequently encounter problems such as double form submissions, frame breaking, and cookie synchronization.
7. Proactive chat facility (if needed and if it fits your philosophy of interacting with customers).
8. 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.
9. A comprehensive set of monitoring and reporting tools.
10. Ability to handle multilingual content, if you interact with customers in multiple languages.

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 eservice 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.

Also, 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 interaction tools, agent effectiveness and productivity are important concerns. Realtime 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 you your agents answer chat and phone requests, don't use the multichat feature, instead ask them to work on emails or faxes during idles 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 from 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 easy 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 realtime interaction 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.
- ▶ Temporarily divert customers to another channel if customer wait times for chat and cobrowse are too high. 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 chats while they are in progress. Also email chat transcripts 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 by 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 cobrowse 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 service channel to increase sales conversion on your website. A differentiated website experience is one of the most important drivers of online customer loyalty.

- ▶ 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 check out with their shopping cart. Chat and cobrowse, when done right, have a measurable positive impact on shopping cart abandonment rates.
- ▶ Include a live help link in outgoing email letters and promotional offers.

- ▶ Encourage customers to use chat instead of the phone channel for faster service 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) 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 interactions 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 realtime interaction 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. And while you are there, don't forget to download a related white paper, "[Chat and Cobrowse: Wow and Win Online Customers with Realtime Service.](#)"

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About eGain

eGain (OTC: EGAN.OB) is a leading provider of customer service and contact center software for in-house or on-demand deployment. Trusted by prominent enterprises and growing mid-sized companies worldwide, eGain has been helping organizations achieve and sustain customer service excellence for more than a decade. 24 of the 50 largest global companies and growing medium-sized businesses rely on eGain to transform their traditional call centers, help desks and web customer service operations into multichannel customer interaction hubs, and to extend their service-based competitive advantage.

eGain Service[™], the company's software suite includes integrated, best-in-class applications for web self-service, email management, knowledge management, live web collaboration through chat and cobrowse, automation of fax and paper-based service interactions, case management, and service fulfillment. These robust applications are built on the **eGain Service Management Platform**[™] (eGain SMP[™]), a scalable next-generation framework that includes end-to-end service process management, multichannel, multisite contact center management, and certified out-of-the-box integrations with leading call center, content, and business systems.

Headquartered in Mountain View, California, eGain has an operating presence in 18 countries and serves over 800 enterprise customers worldwide. To find out more about eGain, visit www.egain.com or call the company's offices: United States: 800-821-4358; London: 1753-464646.

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