AN
ULTIMATE GUIDE
ON CO-BROWSING
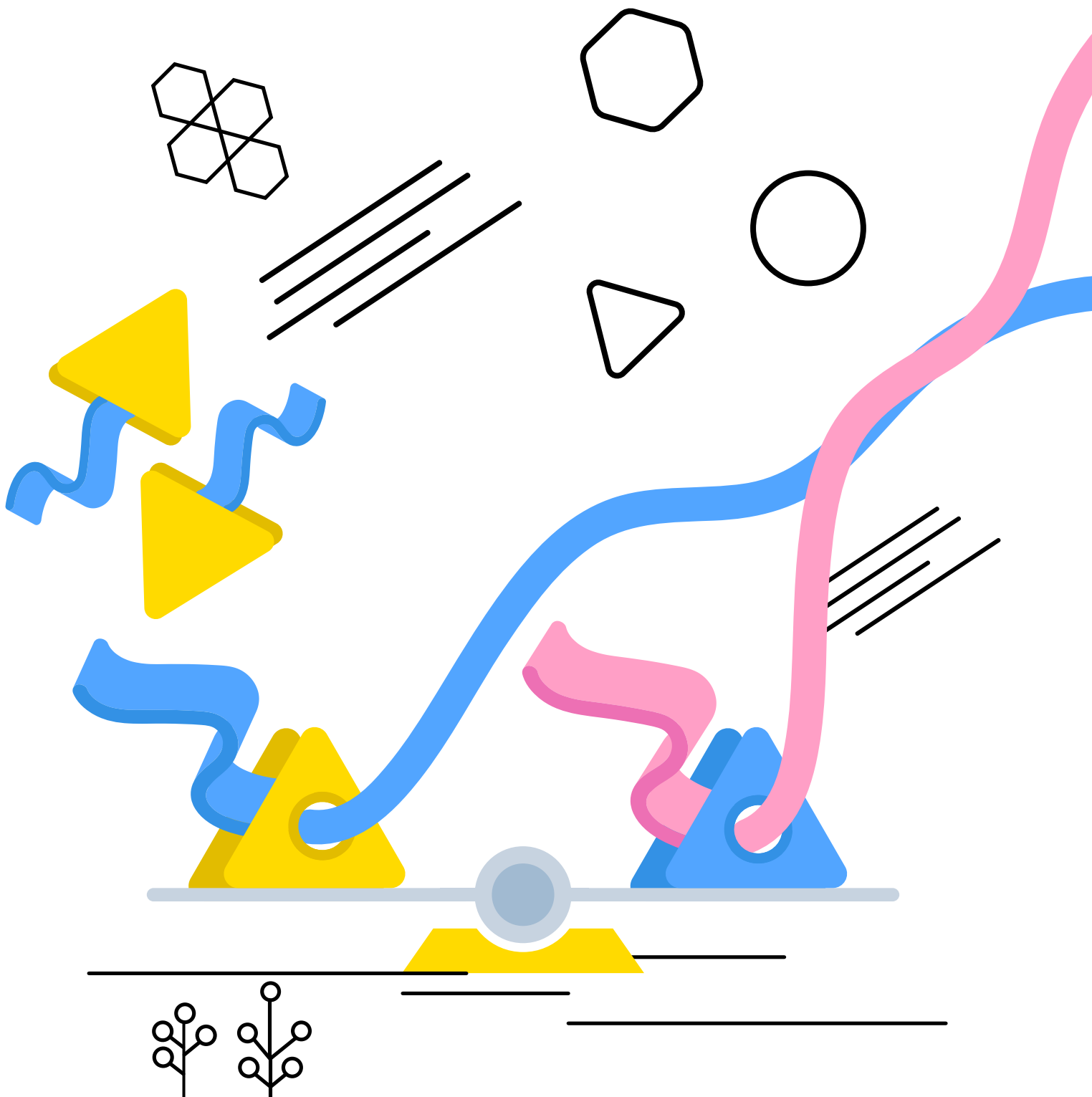
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1. Subject Overview and Brief Introduction

You are frustrated because you can't figure out the product you just purchased. The product manuals are confusing and don't seem to make the product work as it's supposed to. To make matters worse, you have been on hold with customer service for 30 minutes and all the lines are busy. You're furious at the company that sold you the product, and rightfully so. Nobody wants that experience. Not you, and definitely not your customers.

Customer experience is among today's biggest business buzzwords because it affects the success of every company. The better the customer experience you offer, the more business you are likely to enjoy from both new and returning customers.

The most disruptive companies today are astonishingly quick to set themselves apart from competition by leveraging the best in customer experience technology. While integrating live chat software to their websites is a step in the right direction, it's co-browsing software that are really allowing top companies to transform customer experience.

2. What is
Co-browsing?

Co-browsing or Collaborative Browsing is a software-enabled method that allows a company representative to interact with a customer deeply and personally by using the customer's browser to show him or her something. The method entails the simultaneous browsing of the same webpage by two individuals in real-time, during which one individual (the presenter) controls the browsing.

There maybe several use-cases for co-browsing, but the most popular one is when a customer is unsuccessfully trying to operate a product or locate a resource within a website. Without the ease of using co-browsing, customer experience executives have to rely on memory and verbal dictation to guide customers to a resolution. Often times, this process can be excruciatingly frustrating, especially when product and marketing teams are constantly changing the UI and the customer can't seem to find what you are describing. Instead of suffering a customer's temper or wasting time on a simple issue, a customer experience executive can use visually engaging co-browsing software to navigate customers' browsers and resolve issues within seconds.
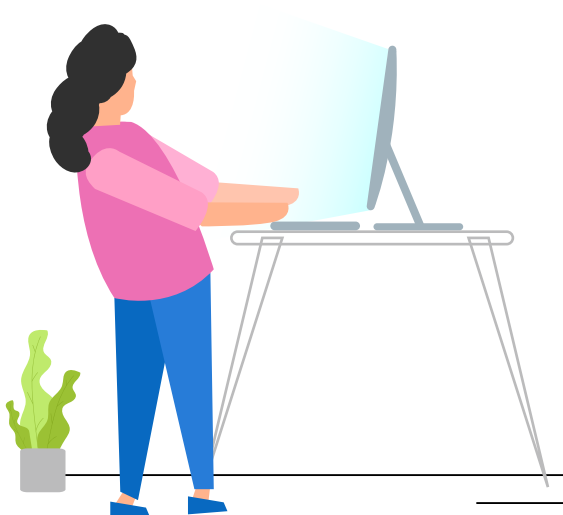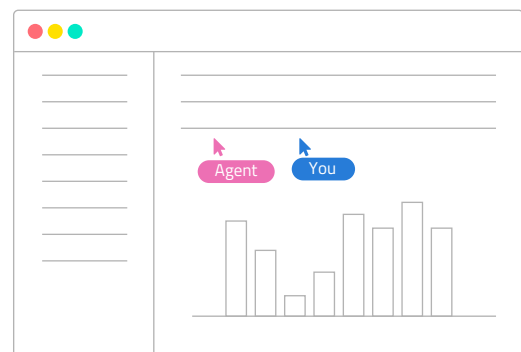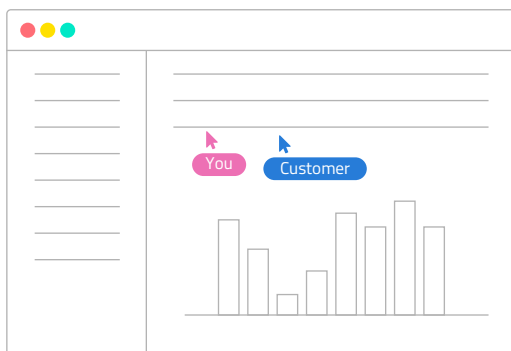
3. Evolution of co-browsing.
How it has been used so far. & results.

Although co-browsing is still in nascent stages of evolution, its origin can be traced back to screen-sharing technology. In fact, pioneer co-browsing products provided more of a one-way experience that resembled screen-sharing than the two-way experience that co-browsing products enable today. In terms of software, early co-browsing products were predominantly built on Java and required download and installation on each participant's PC. Further, the co-browsing speed that such products provided was exceedingly slow and hindered nifty issue resolution. Most products even ran on the simplistic process of exchanging screenshots between two participants.

The first co-browsing products were also severely lacking on the security front, ruining chances of widespread implementation in the corporate sector.

Today's co-browsing products stand at a sharp contrast to early co-browsing products, performing on a completely overhauled software structure that is fully could-based. Advancements of technology have allowed companies like us to create seamless co-browsing technology that requires no download or installation. The real-time sharing capacity of today's co-browsing software has leased businesses the ability to improve customer experience in various stages of the customer journey.
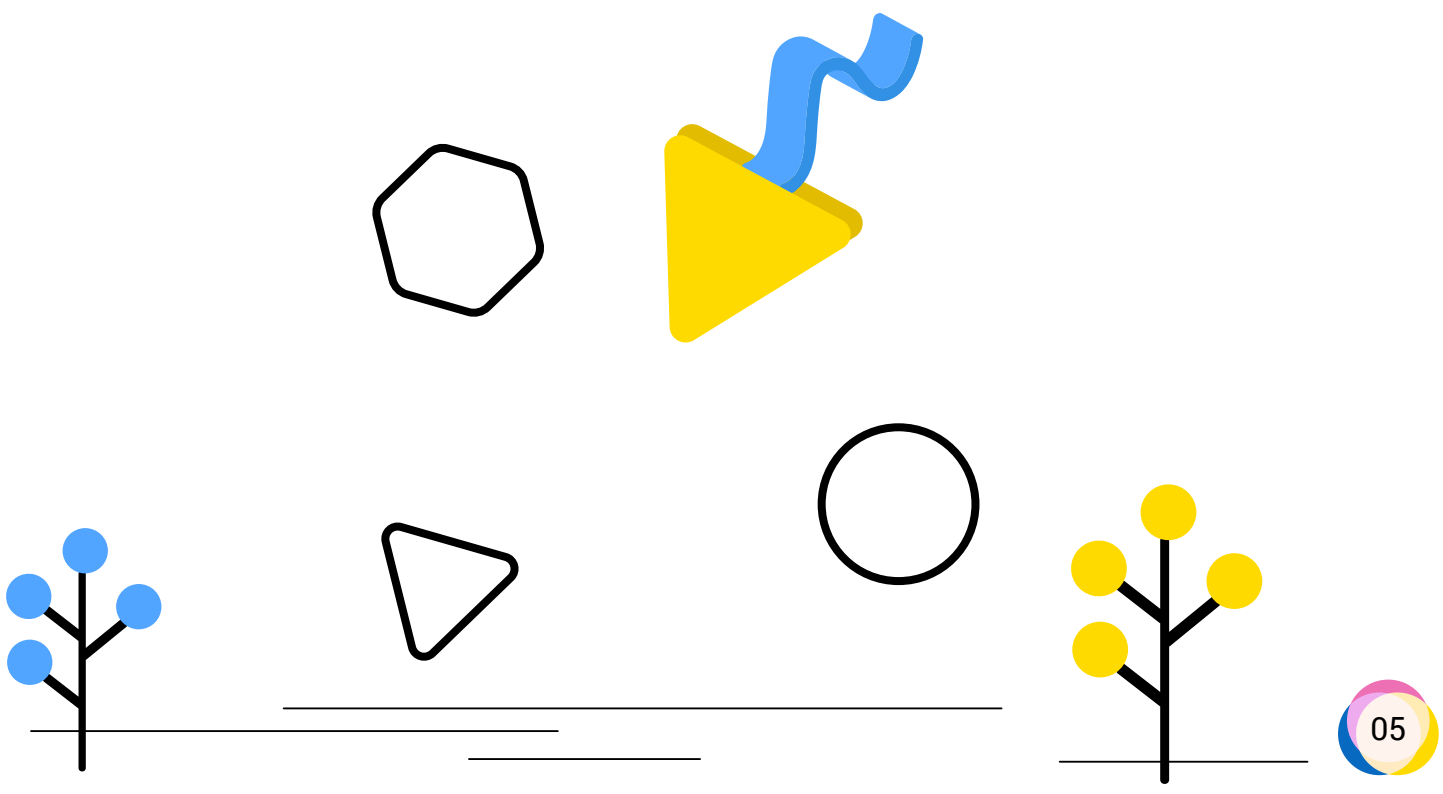
4. Application of Co-Browsing - Areas where it can be useful

There's a montage of collaboration tools on the internet that you may have used for tech support, webinars, meetings and conference calls. Co-browsing software bring the best of collaboration technology to the customer care niche.

- Co-browsing is real-time
- It needs no download and installation and reduces handling time
- It enables customer experience, customer satisfaction and sales
- It creates trust and promotes more conversions
- It is more secure and trustfull

Here are some distinct use-cases that make co-browsing software hard to ignore.

1. Navigation Assitance
2. Customer Support/issue resolution
3. Complex Sales
4. Customer on-boarding
5. Document browsing

Document Browsing

Customer On Boarding

Complex Sales

Co-Browsing Applications

Navigation Assitance

Customer Support

1. Navigation Assitance

When prospects/customers test or use your product and find issues that frustrate them, they can seek real-time resolution from you via co-browsing.

2. Customer Support/Issue Resolution

When prospects/customers test or use your product and find issues that frustrate them, they can seek real-time resolution from you via co-browsing.

3. Complex sales

When making a sales pitch, your sales executives can use co-browsing to give customers an actual feel of a product before purchase, making your sales pitch more powerful and all-encompassing.

4. Customer on-boarding

If your product is complicated and cumbersome to set-up, you can do it for your customers, Via co-browsing. Consider all the conversions you have lost to poor product understand and insufficient time spent on proper set-up. With co-browsing you can eliminate such problems.

5. Document Browsing

When sharing information with customers, it's possible for critical details to get lost in translation and affect customer relationships. With co-browsing, you can take customers through documents and presentations, word by word, if that's the intention. This can be particularly useful for sensitive documents that need detailed explanation.

Co-browsing also works on high-security, so customers can shield certain pages from view and choose to show only what's required. This makes co-browsing apt for enterprise sales and the corporate sector. Most co-browsing software are also compatible with presentation technology and websites other than just your own, so you are free to use the software flexibly based on your specific use-cases.

Here's how you can apply co-browsing in different industries.

1. Online banking & brokerage

- On-boarding of new accounts
- Cross-sell or upsell to existing customers
- Wire money and other transactions
- Loan initiation and servicing
- Online banking and bill payments

2. Insurance/Healthcare

- Application submission and processing
- Research and comparison of plans
- Verification of coverage claims
- Processing of coverage claims

3. Retail

- Sales via catalogues
- Return processing
- Mass purchase deals
- Upselling or cross-selling to existing buyers

4. Travel

- Management of loyalty accounts
- Planning and research for package plans
- Reservations

5. Investment/wealth management

- On-boarding of new accounts
- Linking of accounts and account transfers
- Retirement planning and IRA (Individual Retirement Account) rollovers
- Investment portfolio assessment
- Investment Planning
- Management of investments

6. Education

- Application submission and processing
- Tuition fee payment and processing
- Financial assistance

7. Tech Support

- Troubleshooting and issue resolution
- Maintenance and other queries
- Product training and demos
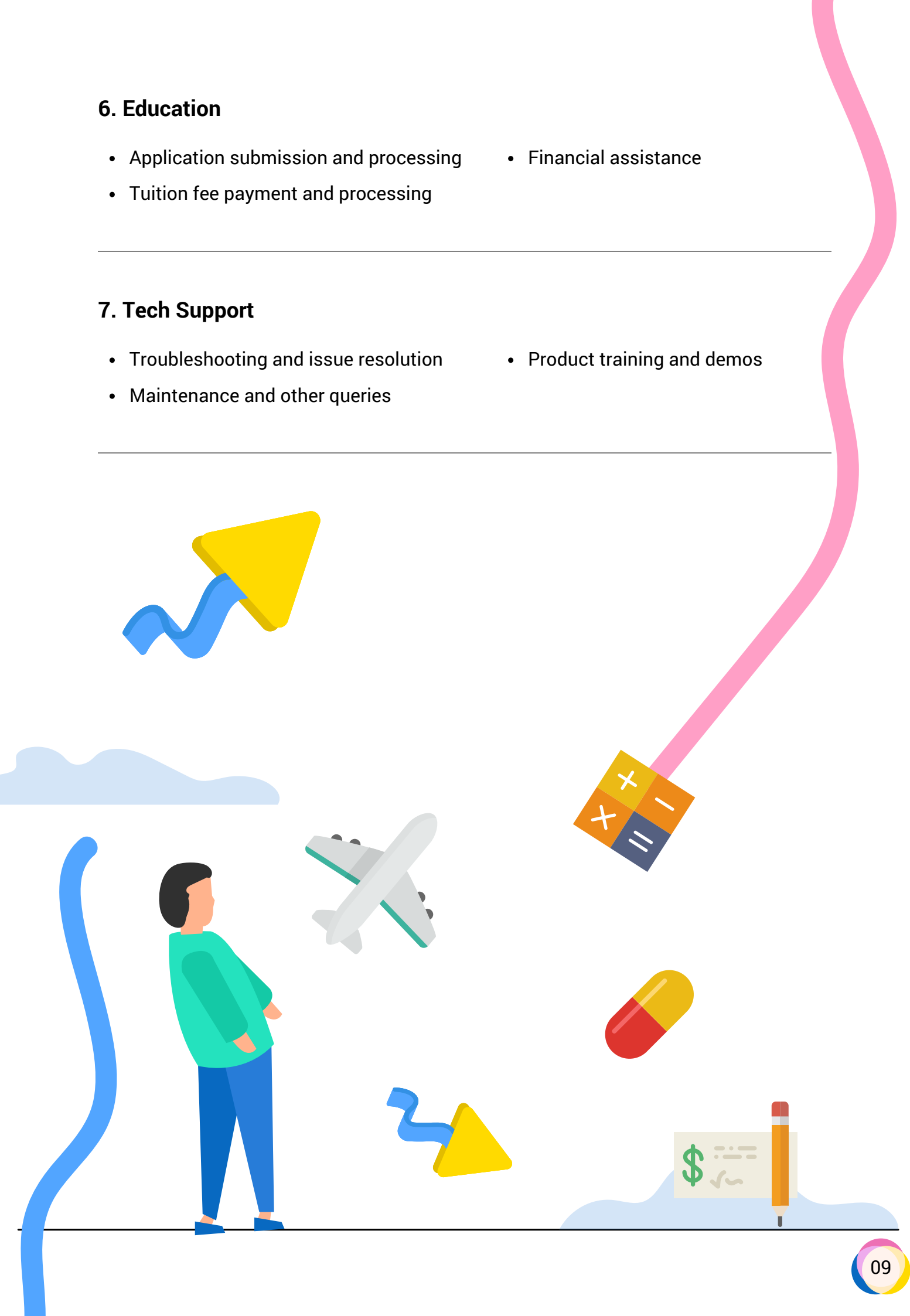
5. Why Co-Browsing? How does it affect your business?

Before making a case for co-browsing software, it's important to understand exactly how important customer experience is and how it affects a company's business.

Twitter recently found that customers are willing to pay more to your company on future tickets after they have had a smooth and positive customer service experience.

Yet another study recorded that 67% of a company's churn is because of bad customer experience. While 1 out of every 26 customers who have had a bad experience complains, the rest just leave - taking substantial potential revenue with them.

That's why companies today are scrambling to get customer experience right, and co-browsing software can enable your customer service and sales executives to provide seamless, quick and satisfying customer service.

Co-browsing software ensure customer satisfaction, reduce support cost and drive revenue increment.

According to a study conducted by the Aberdeen Group, a company with $10 in customer support costs could save upto $280,000 by implementing co-browsing.

The same study also observed that firms using co-browsing for sales and support enjoy a 61% higher year-on-year growth than firms not using co-browsing software.

According to CXexchange, companies using advanced forms of collaboration software can save 50% cost per service request, enjoy 60% reduction in inbound email requests, enable 90% resolution via the first chat and experience a 35% higher conversion rate.

6. Co-Browsing Elements+What to keep in mind while choosing Co-Browsing Solutions

Now that you're aware of the benefits of adopting co-browsing software, it is important to have a clear understanding of the different available solutions and their features. When evaluating co-browsing software, here are a few questions you should consider asking.

How can the solution be accessed and does it require any download/installation?

Several solutions require users to download and run Java programs to access features such as screen sharing. Such solutions can appear suspicious to customers and turn them off from the idea of co-browsing.

A co-browser that works via websites and requires no action on the customer's side is ideal, because it's easy to adopt and creates no security concerns.

When discussing installation, it's important to consider both sides of the experience - the company's side and the customer's side. Some co-browsing software require minimal installation effort on the company's side and none on the customer's side, making it easy to access and run.
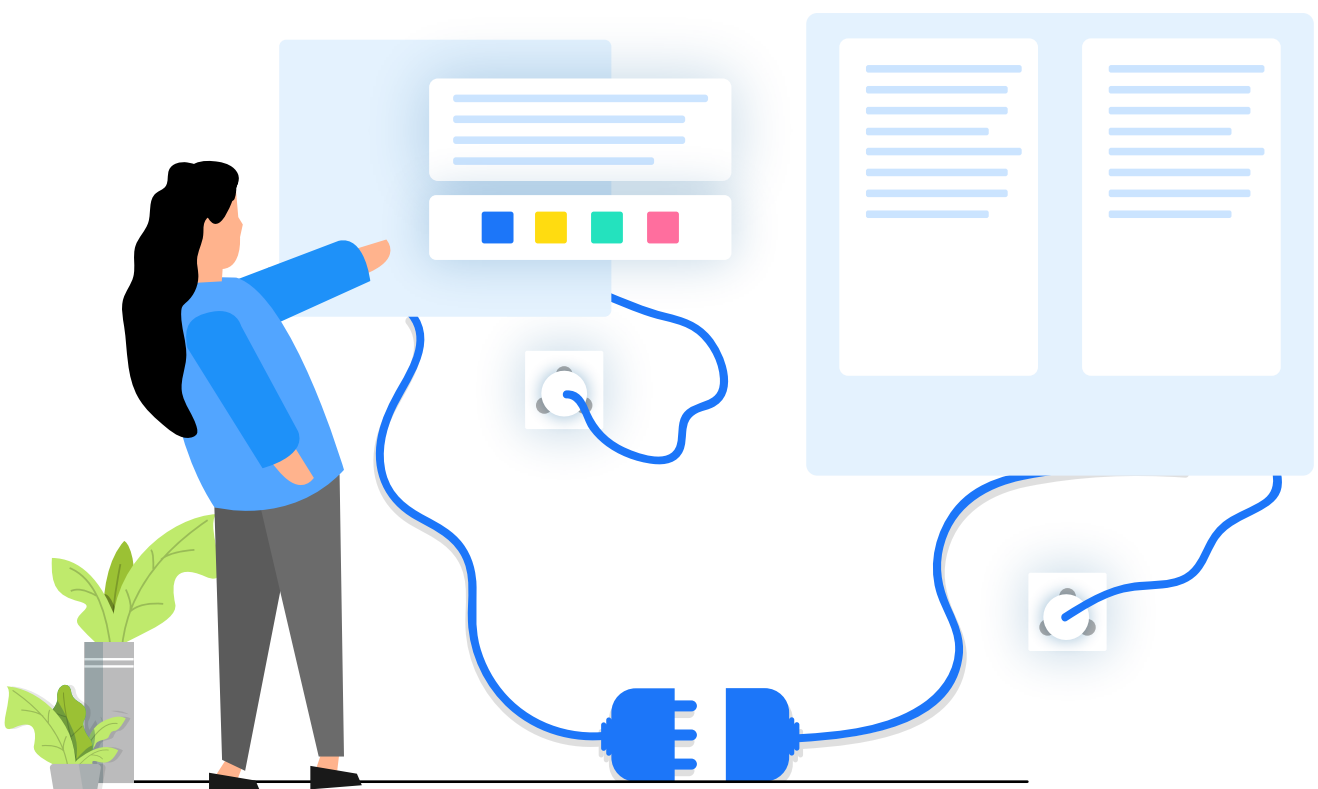
What specific features does the software have and is it a standalone solution?

While co-browsing offers unique visual engagement for customers, it's capabilities are limited. Though co-browsing can function as a standalone software, it performs better when integrated with a complete communication system. Some co-browsing software include video and live chat solutions, making them more engaging than simple co-browsing solutions.

With live chat and co-browsing, your customers can enjoy a seamless experience, wherein navigation and communication can happen within the same software. Such an experience will reduce the chances of your customers getting disengaged and switching channels for the lack of complete support.

Some co-browsing software also offer integration with popular CRM such as HubSpot and Zoho and with eCommerce platforms such as Shopify and even with communication channels such as Slack.

Is the software supported on all browsers?

This one's critical considering the fact that you can't tell in advance which browser a customer uses and can't request customers to change their browsers for one demo or issue resolution. If the co-browsing software that you choose is supported on all browsers, you can unfailingly rely on the service for all of your communications, bar none.

It's also important to check if the software works on both desktop and mobile devices, because there's no way to tell if your customer will want resolution via a desktop or mobile device. Many sales and support executives are left helpless when a customer can't access a desktop and a software doesn't work well on mobile devices.
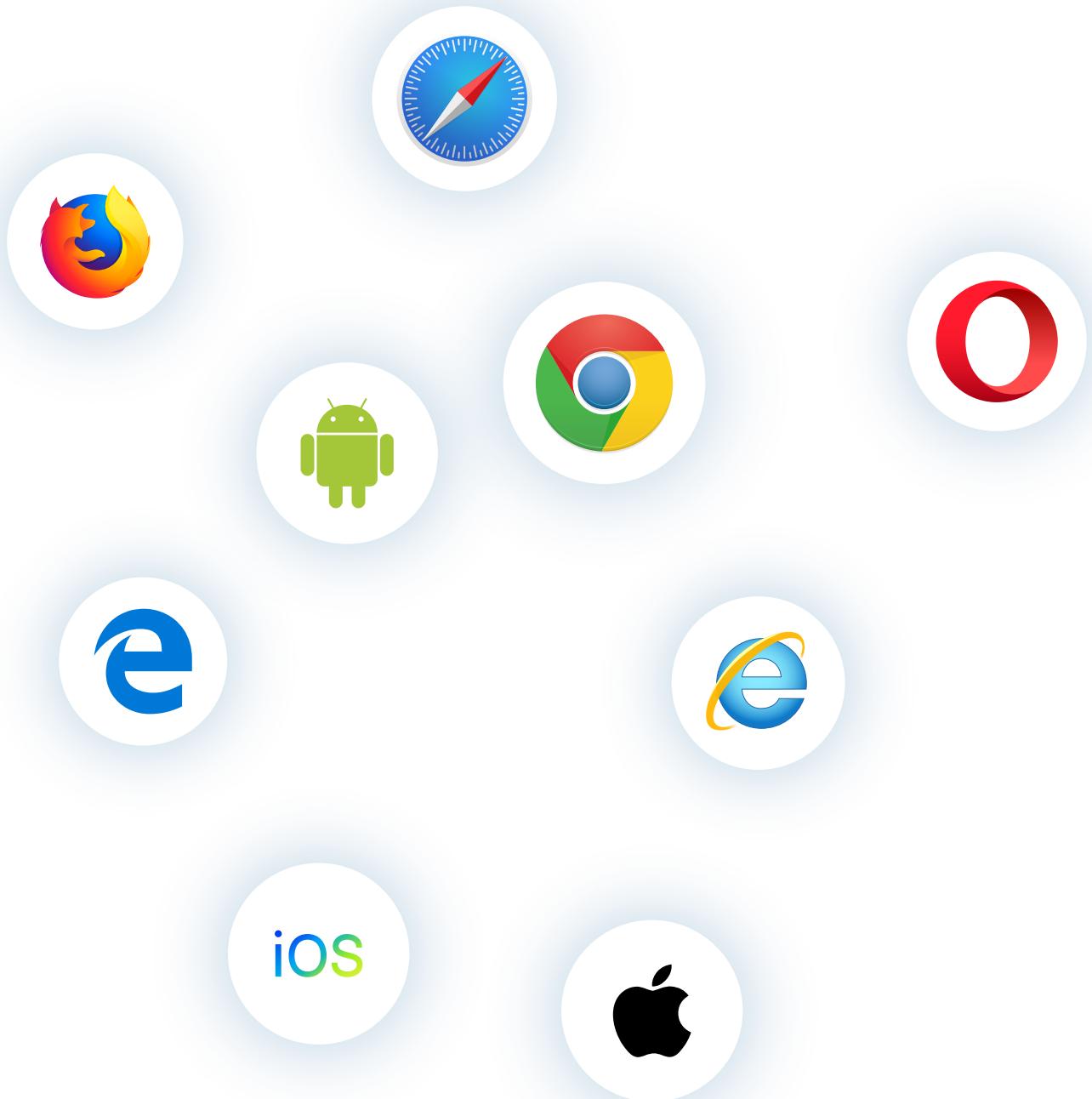
Can sensitive information be hidden and does information ever leave the host's computer?

Privacy and security are serious concerns when it comes to co-browsing software. More often than not, the host (corporate representative) and the customer have information on their desktops and browsers that they do not wish to share with whoever they are connecting to via co-browsing. Further, it's important for the company subscribing to a co-browsing software to know that any details shared via a co-browsing session is secure, and won't be accessed by any 3rd party outside the session. This is of particular importance to companies using co-browsing to assist customer transactions, often requiring the sharing of sensitive information such as credit card details during a co-browsing session.

When choosing co-browsing software, it's important to check their privacy and security measures and if they are compliant with PCI DSS (Payment Card Industry Data Security Standard), which is a reliable standard of security for online software.
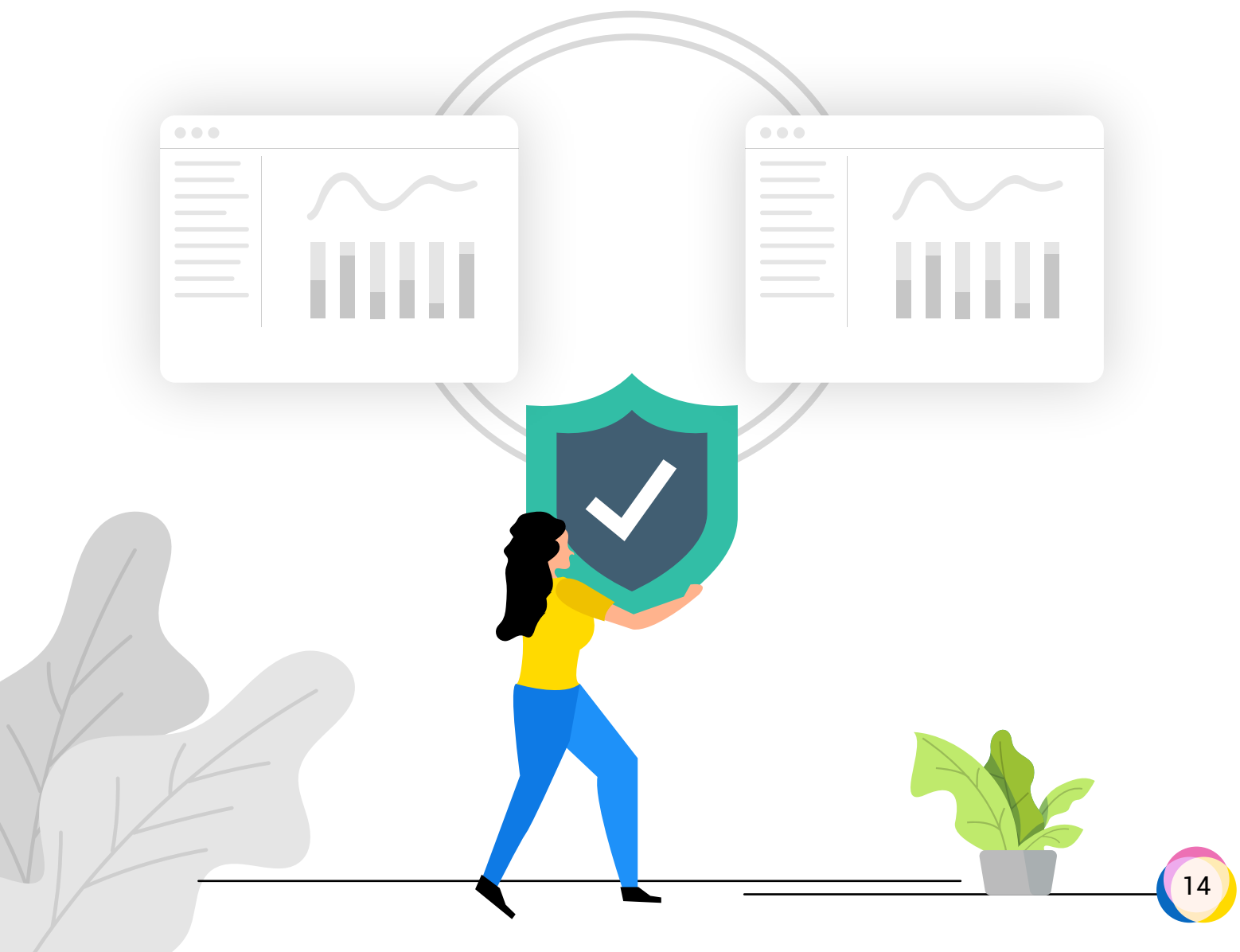
7. Data Security & Privacy

When an enterprise chooses a software solution, it is biased towards low-risk, secure and easy adoption solutions that solve real problems. There's no reason for this principle to change when it comes to choosing co-browsing software. Data security and privacy are critical in co-browsing, especially for those organizations that deal with sensitive information. Such organizations need to carefully evaluate security and privacy protocols before investing in any co-browsing software.

Tagove's co-browsing solution encrypts all communication, either between the customer and the server or between the agent and the server via 256-bit SSL. The connection between the customer, agent and server is encrypted using AES_256_CBC, with SHA1 for message authentication and RSA as the key exchange mechanism. Of all data shared on a co-browsing session, limited information and zero HTML data is stored in Tagove's database. Our co-browsing software only stores timestamps for sessions, URL's of the pages that the session was conducted on, user agent string of the customer, user agent string of the rep and the session code for debugging and analytics purposes.
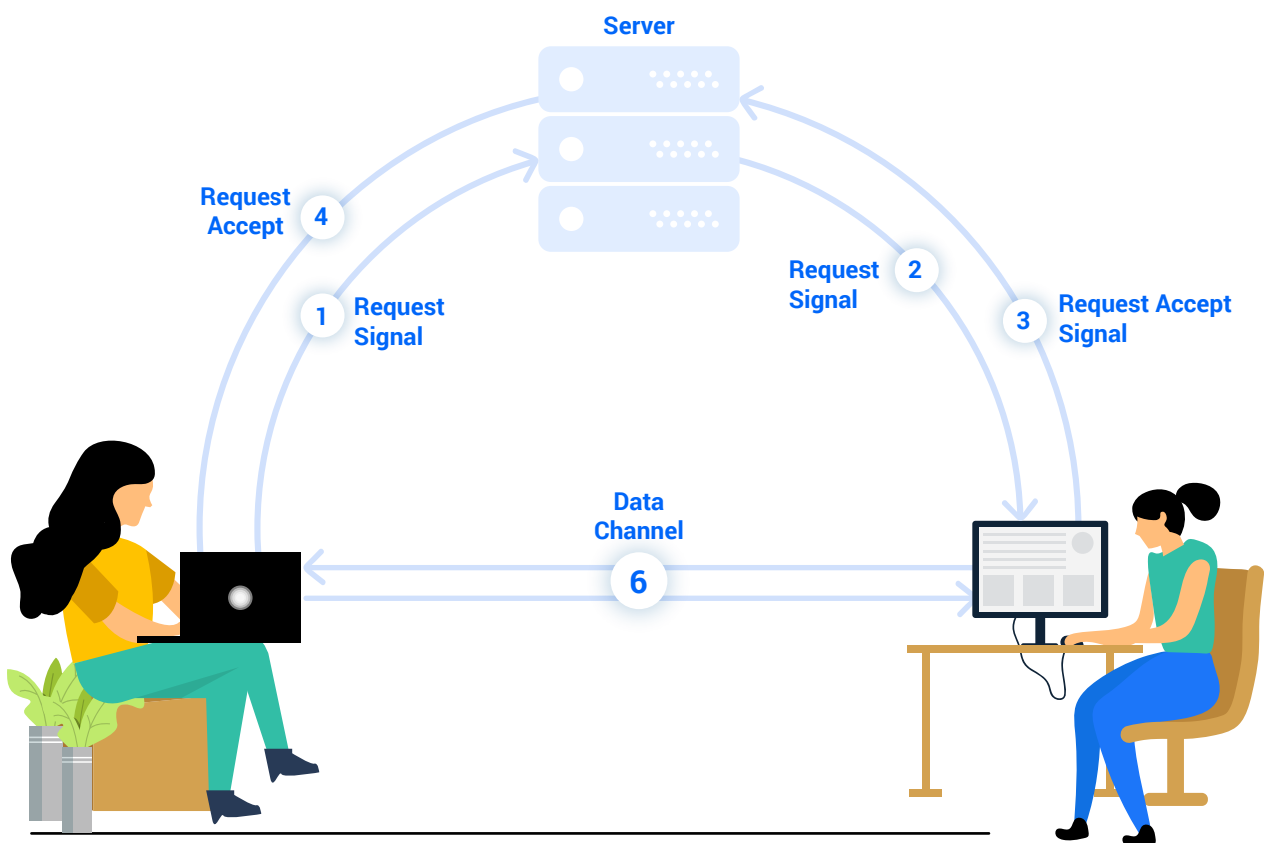
8. Getting More out Co-browsing

Co-browsing does provide customers with a deeply-engaging visual experience, but this experience can be greatly enhanced by designing the right customer experience, choosing the right channels for co-browsing integration and combining co-browsing with supplementary solutions such as live chat. By arming sales and support agents with the ability to not only show but also communicate, you can drive more growth via customer satisfaction and sales.

Companies that integrate co-browsing across all their channels typically experience more complete and omni-channel benefits, setting themselves apart as true customer-centric organizations. And according to Aberdeen,such organizations retain upto 89% of their customers.

Here's are 6 co-browsing best practices and ideas that you can use to harness the full potential of co-browsing software across channels.

1. Define goals and outcome measurement protocols

Which business problems do you wish to solve using co-browsing? Document them and consider them when designing your customer experience. Choose the right metrics to measure the outcomes of using co-browsing. Some of the common metrics used include sales conversion rate, first call resolution, rate customer satisfaction and call handling time.

2. Design a clear, brand-aligned customer experience

When a customer-facing tool or process is added to your organization, it's important that the design of that tool or process match your brand. Customize your co-browsing experience to include your logo, colors and communication style, so your customers are comfortable using the new process. Also ensure that the process is effortless for your customer. Even the smallest of things such as placing the button to launch co-browsing in convenient places helps.

3. Train your agents to use co-browsing technology

To make the most of the real-time and visually engaging features of co-browsing, it's important for your agents to be at ease using the software, Train agents to know the ins and outs of the software and help them help customers navigate and find what they're looking for easily. Also ensure that your agents are equipped to solve all kinds of issues, common ones and unique ones both.

4. Choose which channels to integrate co-browsing with

Where you integrate co-browsing depends on what you want to assist your customers with. Do you want to help you customers navigate your website and find certain resources? Do you wish to assist your customers with filling out online forms on on-boarding a software? Do you want to explain different financial services when viewing account details together? The possibilities are endless.

5. Optimize your co-browsing and chat experience

Determining how to optimize your co-browsing experience depends on a bunch of factors such as complexity of an issue and your customer's personal preference. Based on those factors, you can decide to integrate your co-browsing with chat - text based chat, audio chat or even video chat. All you have to do is let your customer know that the chatting can continue once you have initiated the co-browsing session.

6. Plan how to introduce co-browsing to customers

For instance, consider expressing that you can resolve an issue quicker if you could see your customer's screen and reinforce the fact that your customer's security and privacy is important to you. Explain what you'll be able to see and do with co-browsing and ask you customer if they have questions or concerns before proceeding.

9. So how do co-browsing software function? & How to integrate co-browsing into your website, web app and mobile apps?

Setting-up co-browsing on your website and channels is easy, especially when dealing with a lightweight and cloud based co-browsing software. In the case of our software, Tagove's co-browsing runs entirely on JavaScript within the web browser, is secure and reliable, and transmits page updates instantly. Ite runs in the cloud on OVH and Amazon Web Services.

To set-up Tagove support (chat and co-browsing integrated) on your web properties, you simply need to add a small piece of code on your website. Here's a step-by-step process that you can follow to enable the software.

1. Create an account.
2. Invite team members (if any). You could invite your software developer, so he or she can help you get set-up.
3. Embed a piece of code on your website. You could also email the code to your developer so he or she can get it done.
4. Once you have, you can customize your chat window as per requirements and begin a co-browsing session whenever required.

The co-browsing solution can only be initiated by the agent, so your customer simply has to chat and request for a session.

You could also allow initiation from the customer's side using Tagove's API, which can be made available based on request.

1 Create Account

2 Invite Team Members

3 Piece of Code

Embed Code

4 Your Wesite

5 #0cef98

#0cef98

Customization

1. Create an account.

2. Invite team members.

3. Embed a piece of code on your website.

4. Now, you can customize your chat window

5. Begin a co-browsing session whenever required.

Agent

Customer

Start Co-Browse Session
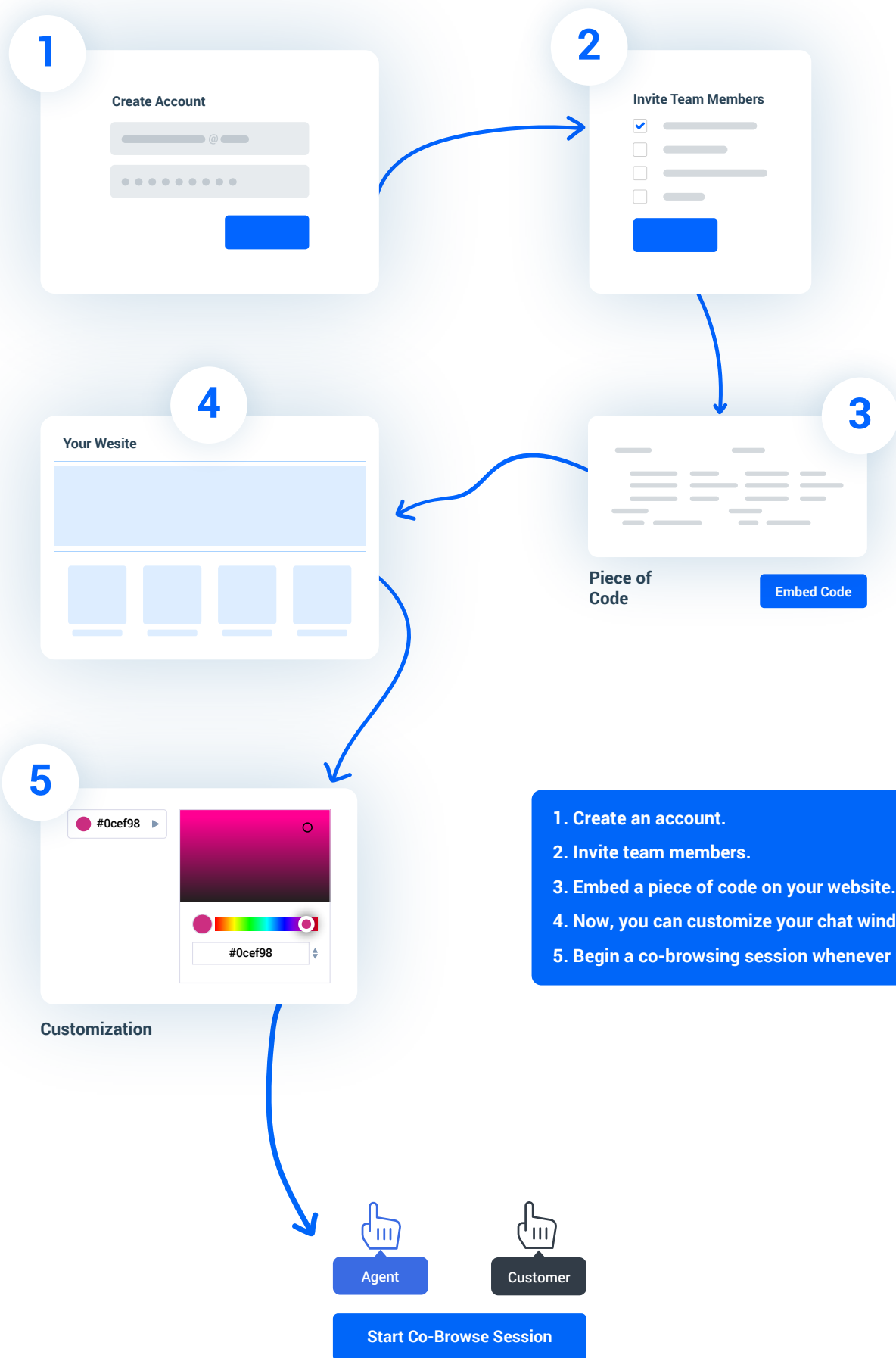
10. Conclusion

Co-browsing can help transform your customer experience, integrated with live chat support. All you require is the right customer experience design and a reliable co-browsing software.

About Acquire

Acquire is a lightweight, omni-channel live chat software that provides video chat, voice call, text chat, co-browsing, screen sharing, and chatbots integrated on your website. Our software is supported for computers and mobile devices, and across widely used browsers in the case of co-browsing. Our easy integration, safe and secure software can be the perfect solution for your customer support and sales needs. To test our software, get started on our free trial today, or write to us for more details.

Get Started Today