Web Chat, Co-Browse and Video Chat

Best Practice Guide

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Web Chat, Co-Browse and Video Chat Best Practice Guide

Of all new customer channels deployed by businesses in recent years, web chat is showing the fastest rate of adoption. According to the Aberdeen Group:

> As more companies understand the importance of reducing customer effort and its impact on the overall buyer experience, the planned adoption rate (37%) places live chat among the top channels companies are planning to adopt in 2015.
>
> **"Flash Forward: 2015 Customer Engagement Channels Adoption," Aberdeen, November 3, 2014**

Several reasons can be attributed for this growth, including improvements in technology and virtual assistants, as well as an acceptance that providing an email-only messaging channel is neither efficient nor meets the engagement expectations of 21st-century customers. Slowly but steadily, chat has become the silent winner in the channel wars.

As adoption of web chat has become widespread, organizations are beginning to learn some best practices they should consider when implementing a chat customer engagement channel. This document discusses some of these web chat best practices and also looks at best practices when deploying complementary channels, such as co-browse and video.

Web Chat Best Practices

Understand Your Target Demographic

First of all, is web chat right for your customer base? What age group are you targeting? What devices do you expect them to use? Preference for web chat varies with customer demographic. On average, the younger Gen X, Gen Y and Gen Z cohorts tend to prefer web chat to phone as an engagement channel, while customers falling outside of those demographics may prefer the phone and face-to-face engagement channels. Before embarking on deployment of web chat, make sure it is the right channel for your customers.

Understand Your Business Objectives

Once you have decided to deploy a web chat channel, you now need to be clear about your business objectives. Is your main objective to increase sales? Improve customer support? Reduce webpage bounce rate? Provide a better customer experience? You need to be clear about your business objectives, as that will determine where it resides on your webpage and when you offer your web chat session.

Take the Customer Journey

Once you are clear on your business objective and are sure that web chat is right for your customer base, the next step is to take the customer journey. Customer journey mapping involves carrying out multiple customer engagement scenarios to ensure, as far as possible, that every customer journey or navigation through your webpage has been considered. Scenarios could include product research, purchasing, self-service or a customer problem, such as a complaint, refund request, repair request or configuration problem. For each of these scenarios, you need to determine the customer starting point. This could be your web home page, your social media page or a third-party social media application, such as Twitter. Identify the steps in each scenario a customer may go through and determine at what point you want to offer a chat option, on customer demand or proactively.

Visibility – Web Chat Placement

The location of web chat on your webpage is closely linked to your business objectives. If your main objective is to drive sales, then web chat should be a prominent feature on your home page and on any web forms required to complete a purchase. If web chat is being deployed as a support channel, it should be clearly displayed as an option on your support landing page, followed up with proactive offers as a customer searches for content and support without finding results.

Web Chat Must Co-exist with Existing Channels

Just because you are deploying a new channel doesn't mean that your legacy channels are going to disappear. Contact centers have to handle a mix of channels to support customers with different engagement preferences. In addition, an initial customer engagement via chat may have to be escalated to another channel for more detailed investigation or for security reasons. Organizations deploying chat should thus not do it in isolation and must consider its integration with other customer channels, giving consistent information in context to known customer details.

Record Chat Sessions within the Customer Engagement History

Whether a customer has contacted you via chat, voice, social or other channels, the record of the engagement should be kept within the customer contact history for future reference by agents. Not only may this be required for regulatory purposes, being able to refer to previous engagements can help agents personalize future chat sessions. The ability to store a record of chat sessions is a key requirement in streamlining subsequent interactions, enhancing the customer's experience.

Contact Center Blending

Many organizations choose to separate teams handling chat (and social media) and voice customer service to maximize the productivity of the unique agent skills required to support chat sessions. For smaller organizations, this separation may not be practical or cost effective. As a result, they choose to blend chat and voice sessions.

Blended contact centers obviously have an advantage in being able to create a more flexible team that is able to adapt and respond to demand peaks and troughs in specific contact channels, breaking down siloed channel conversations. Where organizations choose to blend, they should ensure that agents do not have to perform concurrent voice and chat sessions as full attention on the customer is required during real-time, synchronous interactions.

To maximize agent productivity and enforce blending rules, organizations should choose tools that can handle the sophisticated routing and queuing of multichannel customer engagement. In addition, the integration to workforce management (WFM) applications can deliver improved staff forecasting across channels and work queues.

Concurrent or Multiple Chat Sessions

Verint recommends the use of concurrent chat sessions to maximize agent productivity. Our experience has shown the average chat concurrency rate across industry to be approximately 2.7. However, this rate can vary, depending on the industry and complexity of issues being resolved by agents. Again, tools are required that can enforce business rules on the maximum number of concurrent sessions.

Knowledge Management Integration Is Key

For the agent and customer, integration of knowledge management with chat is essential. Deploying knowledge management to support customer self-service helps deflect the number of issues escalated. Using it in conjunction with chat enables the appropriate chat queue to be provided, as well as ensuring web chat or other customer channels are used for appropriate interaction types. In addition, multichannel knowledge helps enable the consistency of answers and content across self- and assisted-service channels, while allowing the contact center to pick up where the customer left off.

Knowledge management can significantly improve agent productivity by delivering the most relevant information to the agent in the shortest possible time. Rather than having to search for key information in multiple, poorly integrated databases, by using integrated knowledge management, agents can rapidly search for information across multiple internal information sources, as well as external content, as they participate in a live chat session. The knowledge management application should be able to deliver content segments to the agent based on the context of the chat session, such as where the chat was requested (webpage, product, support articles), who the customer is (authenticated, VIP, anonymous) and the existing relationship (open issues/cases). This reduces the amount of typing required by the agent and speeds up the engagement with the customer while helping to improve satisfaction, since there is no duplication of customer effort as they move to assisted service. Where the context isn't sufficient to serve the agent, a knowledge management application should support traditional knowledge access, allowing agents to search via keywords, natural language, Boolean queries or parametric inputs, and also providing agents with browse trees, bookmarks and guided process flows.

For issues that are too complex to be answered by a single knowledge query, dynamic scripts can be used to help guide agents through complex issues by asking a series of questions to narrow down the issue – enabling assisted, case-based searching of the knowledge base.

Offer Proactive Chat – But Be Careful

Proactive chat, that is, web chat sessions initiated by the business and not the customer, should be a key feature of your web chat solution. Proactive chat allows agents to intervene or to offer a web chat interaction when they detect that a customer is having problems. To provide proactive customer support, the system must be able to be configured so that chat rules automatically trigger a chat session when, for example, a customer has spent a long time on webpage, has input incorrect values into a web form, has had multiple visits to a specific webpage, has spent a long time on an FAQ or self-service page or has searched for a specific word or phrase.

However, organizations should be careful when offering proactive chat. Visitors should be given sufficient time to browse the webpage, and proactive chat should only be offered once so as not to irritate the customer.

Hire the Right Skills

Local language, business writing and typing are key skills required by agents to provide successful web chat in your contact center. Agents must be able to type quickly and produce well-structured, coherent content that presents your organization professionally —very different skills from those required in the call center. As a result, many organizations choose to recruit separate teams to work on web chat, often pooled from subject matter experts with experience in traditional channels. In addition, web chat skills can also be used if a social customer service channel is offered—and customers using the social channel expect a much shorter time frame for a response than in traditional channels.

The day you start planning the deployment of web chat, start a recruitment and training drive to find agents who have the right skills.

Training

Where it is necessary to utilize a blended contact center, organizations should look for existing staff with expert knowledge who can demonstrate good writing ability. This provides your contact center with agents possessing solid business knowledge who can communicate effectively via a written channel.

Personalization

To improve the overall customer experience, personalization of web chat sessions is an important consideration. Personalization of the web chat session can be achieved in a number of ways, including:

- Linking customer information to previous engagements or purchase history. The agent can then refer to previous customer purchases or support requests during the course of the conversation.
- Using logos, images, pictures and fonts within the chat session that are consistent with your brand.
- Using first names for the agent and the customer.

This preserves conversation and interaction context, meaning that the customer starts to gain confidence that the agent is assisting them from where they left off, which in turn, helps elevate customer satisfaction.

Escalation

Escalation is the transition from one channel to another to resolve a customer issue. Escalation can be necessary for a variety of reasons, including security or due to the limitations of the channel itself. The challenge for organizations is to make escalation as seamless or frictionless for the customer as possible. Where possible, never escalate to another agent.

Chat Escalation to Co-Browse
Co-browse is a visual assistance tool often deployed in tandem with web chat to enable agents to provide a deeper level of support. Many customer scenarios exist where it may be necessary to escalate a web chat session to a co-browse session, for example, when assisting customers with the completion of complex forms or training customers in how to use self-service tools, such as online banking or new software product features.

Co-browse lets your agent and customer simultaneously browse the same webpage. The co-browse session can begin on the exact page where the customer needs help and can preserve the exact state of any forms on that page. Non-sensitive text entered in a form before co-browsing is automatically displayed when the session begins. Co-browse applications should hide sensitive data and restrict form submissions to customers only, ensuring security and compliance. Co-browse can be initiated by an agent during a chat session. The agent can then see the customer's screen and help guide the customer through whatever process is necessary to resolve the issue.

Chat Escalation – Video
Video has emerged as a new customer service channel and is the ultimate way of personalizing digital customer service. Much like co-browse, video is best suited for more complex customer engagement or service scenarios. Because of its higher cost to deliver, it is typically used to engage with high-value customers or customers considering an expensive purchase, such as computers and other electronics. It can also be used by organizations selling services that require a high level of trust, such as consultants, trainers and lawyers.

Escalation from Social to Web Chat
Many organizations offer Twitter as a customer engagement channel. In many cases, it is not possible to resolve customer problems in 140 characters, nor is it advisable to attempt to resolve sensitive or difficult issues on a public forum. By escalating an initial Twitter engagement to a web chat, the organization can meet the resolution speed and digital engagement preferences of the customer while, at the same time, ensuring that the engagement is conducted in a private and secure manner.

Chat Filtering and Allocation

In multiproduct contact centers, the use of initial filtering details can help ensure that the chat session is automatically routed to the agent with the right skills to answer the customer question. Filtering details can be provided systematically—for example, based on the page or product the customer was looking at before the chat started—or can be provided via a pre-chat questionnaire, capturing the customer initial question, order reference or email address. In addition, organizations should choose customer engagement applications that can handle sophisticated allocation and queuing that matches the chat session context, such as webpage, location, device, and employee skills and availability.

Filtering and smart allocation can help maximize the effectiveness of the chat session and first contact resolution. In addition, better matching of agent and customer delivers a more personalized interaction.

Clearly State Wait and Availability Times

There will be times of peak demand or unforeseen circumstances where immediate chat sessions are not available to the customer. In these situations, it is critical that the customer is placed in a queue, should they wish to do so, and kept informed of the wait time. In situations where the chat service is not available 24x7, the chat option should be removed or disabled from the webpage outside working hours. If this is not possible, you should clearly display the working hours in the messenger window. Transparency is key.

In situations of high demand and where chat is unavailable, the customer should be clearly offered other engagement channels.

Ask for Feedback

To determine the success of the customer engagement and discover opportunities for improvement, it is recommended that organizations request feedback from the customer at the end of the chat session. Typically, this is done with a survey delivered within the web chat session. Surveys should be short and focused on the key metrics you are looking to measure.

Don't know the Answer?

On many occasions, it will not be possible for a customer issue to be solved within a chat session. As previously discussed, escalation to other channels for deeper analysis of the customer problem is a potential solution. Where escalation is unable to resolve the issue or inappropriate, a customer case should instead be raised. The case or issue should then be managed to completion by a case management solution that keeps the customer and agent informed of progress.

Security

For non-authenticated users, the handling of secure information, such as credit card details, addresses, etc., should not be part of a web chat session. If secure information is required, the customer engagement should be escalated to a more appropriate secure customer channel, such as voice, or the customer should be able to authenticate via enterprise authentication portals. This enables the same agent to handle the customer's issue, enhancing first contact resolution and customer satisfaction.

Appendix 1: Co-Browse Tips

Co-browsing and chat are complementary technologies, with co-browse being a potential escalation path for agents using web chat. As a relatively new digital engagement channel, co-browse is an exciting and potentially very helpful technology, and customers typically feel at ease very quickly when they use it. However, some people may have reservations, so here are a few tips on how to make them comfortable with trying it out.

When to Use Co-Browse

Co-browse can be used as an escalation path from an unproductive phone call or chat session. Customer scenarios that can benefit from escalation to a co-browse session include:

- Assistance with the completion of complex customer forms
- Explaining or training a customer to use a new software application
- Showing a customer how to navigate a new or unfamiliar webpage

Agent Training

To help ensure continuity, a co-browse session that has been escalated from a voice or web chat session should be performed by the same agent that handled the initial engagement. This means that agents working in the contact center and web chat teams should be trained in the use of co-browse.

Security and Privacy

Many customers are rightly concerned about their Internet security. Therefore, a request by an agent to offer web assistance may trigger some concerns. To build trust, the agent should:

- Explain that it is the decision of the customer to grant access to their personal desktop to begin a co-browse session
- Explain that no software downloads or installations are required for co-browse
- State that they (the agent) are only able to access the browser and cannot access other applications or the hard drive on the customer's computer
- State that co-browse only works for our website; the agent is unable to access anything else that's on your computer
- Explain that any confidential information entered during a co-browsing session, such as credit card information, is only ever stored on the target server and not by the co-browsing system

Co-Browsing Roles

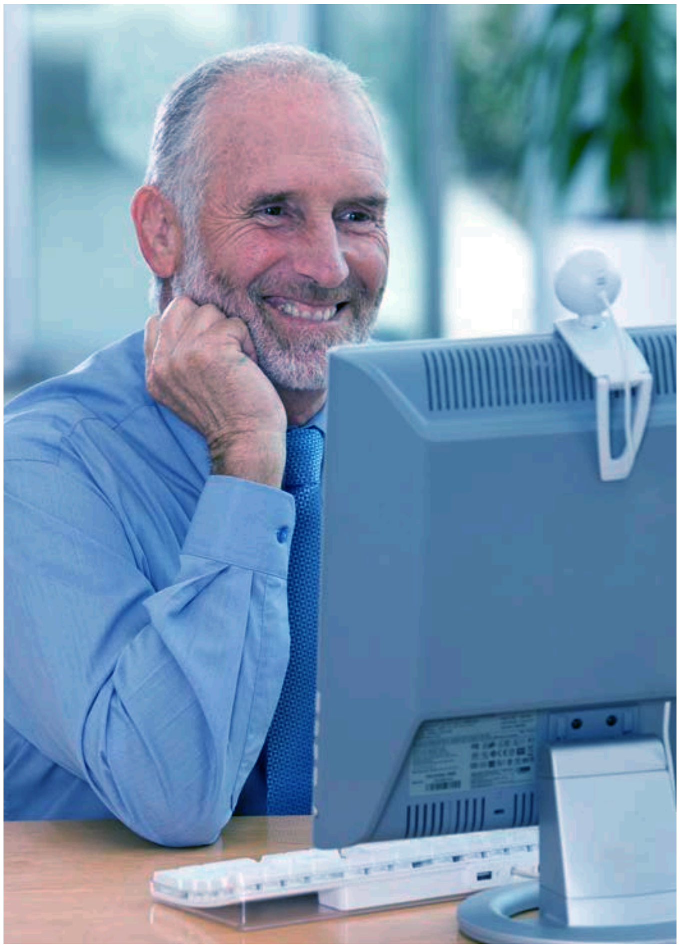
Who leads the co-browse session depends on the nature of the engagement. If the co-browse session is to resolve the customer issue, the agent should invite the customer to lead the engagement and show agent the issue they are having. If the co-browse session is to train the customer in how to use a software application, the agent should ask permission from the customer to lead the engagement.

Appendix 2: Video Chat Best Practice

While video chat is currently an emerging customer service channel, improvements in mobile and domestic broadband speeds will help adoption. Gartner predicts that:

> Over 100 of the 500 largest global businesses will introduce video-based chat by 2018 for customer-facing interactions.

Gartner, Predicts 2015: Weak Mobile Customer Service Is Harming Customer Engagement, Michael Maoz, Jim Davies, Jenny Sussin, Olive Huang, Brian Manusama, Sorell Slaymaker, 11 November 2014



When to Use Video Chat

As a result of its high delivery cost, video chat should be regarded as a premium customer engagement channel. It should be used for high-value sales opportunities or supporting high-value customers.

Agent Selection

Agents engaged in video chat should have strong communication skills. As a result, agents previously involved in voice customer support may be good candidates for video chat delivery.

Agent Appearance

The agents are the visual representation of your business or brand. As a result, their appearance is a critical consideration when deploying a video chat customer channel.

Chat Plus Video Chat

Video chat should be combined with standard chat so the video agent can deliver a complete customer engagement. Chat enables the video agent to supplement their communications with web links, images, documents and more detailed information. Video chat also acts as a potential escalation path for customer engagements that started as a standard chat session.

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About Verint® Systems

Verint® is a global leader in Actionable Intelligence® solutions for customer engagement optimization, security intelligence, and fraud, risk and compliance. Today, more than 10,000 organizations in over 180 countries use Verint solutions to improve enterprise performance and make the world a safer place.