



Co-Browsing Solutions: A Buyer's Guide

Evaluating a co-browsing solution?
Here's what to keep in mind.

More than ever, organizations must be able to offer clients online service that comes as close as possible to an in-person customer experience. Co-browsing allows your customer-facing teams to jointly navigate webpages with customers and guide them through their digital experience.

Whether you have customer service agents walking customers through transactions, bank officers helping clients complete forms, or trainers helping people learn, co-browsing lets any customer-facing team member see exactly what a customer sees and visually guide them.

The result? A fast and frictionless customer experience, minimal frustration on all sides, and resolution in real time.

Co-browsing complements your existing phone and chat service channels while also elevating your services with a concierge-like online customer experience.

Co-Browsing for Customer-Facing Teams:

- **Customer service and account support** > Help customers change a subscription, update billing information, change settings.
- **Form conversions** > Assist clients with submitting an online application, filling out warranty information, submitting a claim, or providing banking information.
- **Onboarding and training** > Offer white-glove training sessions for online software, introduction to knowledge base.

STEP 1

Know Your Needs

To choose a co-browsing solution that meets your needs, you should first pinpoint your key objectives.



Goals

What are your primary goals and in what order of priority?

What metrics matter most: operational metrics like average handle time? Customer effort score? Or are you trying to up-level the customer experience?



Timing

How quickly do you need to deploy co-browsing?

A solution that requires you to line up web resources to implement code on a site could slow down your deployment.



Priorities

Have you mapped out the problem areas you want to fix in the customer journey?

A clear, comprehensive strategy makes for a better co-browsing experience.



Security

What security standards must your co-browsing solution meet?

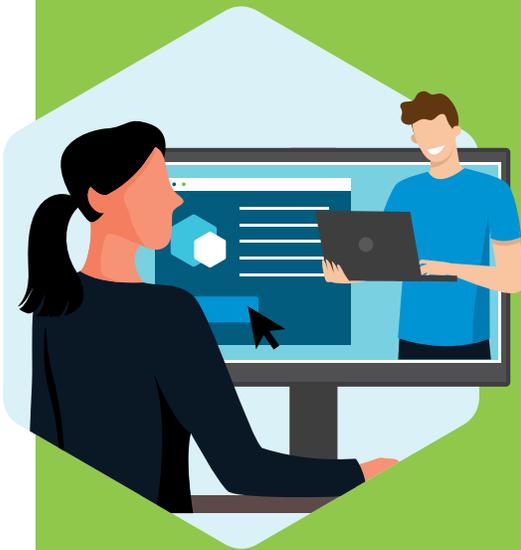
Mitigate risk to your business by ensuring that customer data remains private, agents don't have access to more customer information than they need, and that the solution is architected with security in mind.



STEP 2

Understand the Key Components of Co-Browsing

A good co-browsing solution makes life easier for customers and gives you the flexibility to customize your services for your organization's needs. It also has to be secure and reassure customers that their information is protected. Finally, it should meet your needs without requiring frequent website updates or forcing your traffic through the provider's server.



Simple, Frictionless Customer Experience

A customer-friendly co-browsing solution should:

- Make life easy for customers by allowing agents to see what the customer sees, get to the heart of the matter, and resolve issues quickly.
- Let people skip the hassle by not requiring any downloads to start collaborative browsing. This capability lowers the barrier for customers to successfully complete a process, prevents drop-off, and ensures they keep using your product or service.
- Reduce customer effort to get back to what they were doing, show them how to do it themselves in the future, and keep them coming back for more.



Worry-Free Security

Security is not optional. A secure solution is precisely architected for the most secure co-browsing experience possible, including features such as:

- Connection to an isolated browser in the cloud, never to the end user's device. It should not save customer data or force your traffic through the provider's solution.
- Masking all sensitive customer PII data from the agent's view, whether you are co-browsing on your own website or a third-party domain.
- Button block capabilities that mitigate risk by restricting agents from clicking on particular links or buttons on behalf of the customer (e.g. Accept, Buy Now, Submit, Cancel).



Full Flexibility

An exceptional customer experience requires a solution that lets you follow the customer journey wherever it leads:

- Empower customer-facing teams to give your customers guided assistance on any device, mainstream browser, or website – not just your own.
- Follow customers across tabs and toggle back and forth between these tabs as part of the co-browse session.
- Control your deployment approach by ensuring your solution lets you instantly deploy without code, so you can build a business case without touching your site, then add code later. The set-up should let you easily configure account settings and own the customer experience without calling in your web team.



Personalized Service

Co-browsing isn't one-size-fits-all. A good solution lets you:

- Differentiate and clarify the agent's activities with features like labeled cursors and personalized roles (e.g. loan officers vs agents) to make it clear who is taking what actions.
- Deliver truly meaningful service by localizing messages and labels in the customer's preferred language.
- Add shortcuts like configured keyboard shortcuts and co-browse buttons to your site to make the service experience faster and more customized.

STEP 3

Contact Us to schedule a Live Guide demo.

Live Guide is an instant and secure co-browsing solution that enables all customer-facing teams across the organization to provide personalized, concierge-level visual guidance on any digital property. Remote teams? No problem. Live Guide is entirely browser-based, so if you've got a computer and internet connection, you're ready to roll.

