



An Oracle Best Practice Guide
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Best Practices for Oracle RightNow Cobrowse Cloud Service

Introduction

Using phone or chat channels is a popular way for customer support staff to communicate with customers while they are visiting a company Website. These channels can be effective in helping those customers solve their problems, complete sales transactions, or otherwise achieve their goals.

In many cases, however, a customer and an agent can resolve an issue more quickly and with a greater level of understanding and satisfaction by viewing a common screen—often referred to as “cobrowsing.” Oracle RightNow Cobrowse Cloud Service enables cobrowsing and is an indispensable sales conversion and customer support tool that drives business objectives as well as revenue.

This guide covers seven best practices for executives, managers, and technical staff to consider when planning, deploying, and using Oracle RightNow Cobrowse Cloud Service. In addition, it presents ways to measure the success of such a deployment.

Understanding the Problem

Oracle RightNow Cobrowse Cloud Service is a highly effective tool for assisting customers in sales and service scenarios and has very few barriers to success. Smart businesses deploy Web self-service, live chat, and phone support, but these services may no longer be enough for today's Web-savvy consumers. Businesses also need to provide a seamless way to escalate problems to more-effective channels. There is also a growing need for a more personal assisted Web experience in the high-volume contact center. Further, all this must be done in a way that enables companies to increase agent productivity—while also enhancing the customer experience.

Addressing the Problem Through Best Practices

All these problems can be solved with Oracle RightNow Cobrowse Cloud Service to enable the customer to share the screen with a support or sales agent. The following best practices ensure that businesses get the most out of Oracle RightNow Cobrowse Cloud Service.

Best Practice #1: Clearly Define Your Goals Through Metrics

Cobrowsing has the potential to significantly improve many of the key performance indicators important to your organization. The first step in adding any new channel to your agents' arsenal is to clearly define the business problem you are solving and the associated success criteria. It is important that all stakeholders agree on a common set of objectives and measurements and that this information is clearly communicated. Implementing ways to measure and track these metrics over time will help ensure that you meet your stated goals.

Among the most common metrics for measuring success that are used by Oracle RightNow Cobrowse Cloud Service customers are the following:

- **Sales conversion rate.** Oracle RightNow Cobrowse Cloud Service enables agents to coshop with customers, recommending products or services and effectively cross-selling, up-selling, and increasing order size.
- **Shopping cart abandonment rate.** Oracle RightNow Cobrowse Cloud Service enables agents to guide customers through the checkout process, reducing shopping cart abandonment.
- **Call handle time.** Augmenting phone calls or live chat engagements with Oracle RightNow Cobrowse Cloud Service results in shorter and more effective interactions. Without cobrowsing, it typically takes four minutes for an agent to identify exactly where a customer is on a Website. This time can be virtually eliminated by screen-sharing. The remaining interaction will also be streamlined through the visual connection.
- **First-contact resolution rate.** By assisting with complex or confusing Web forms and other processes that would be too difficult to simply describe, Oracle RightNow Cobrowse Cloud Service is effective in increasing the first-contact resolution rate. This rate is further increased via a visual

connection between the consumer and the agent to ensure that an issue is completely resolved and that the consumer is not continuing to have unforeseen problems.

- **Customer satisfaction.** The ability to be “on the same page” has been shown to significantly reduce customer frustration, leading to higher satisfaction rates.
- **Web self-service rate.** With Oracle RightNow Cobrowse Cloud Service, guiding customers to appropriate answers in the knowledgebase and teaching them how to search and navigate more effectively in the future will help customers acquire the skills they need in order to increase their own Web self-service rates.

Best Practice #2: Invest in a Pilot Program

An effective pilot program will produce results that will benefit your organization long after the pilot has concluded. A successful pilot program includes several elements.

A pilot program should produce a set of baseline measurements for the project’s success criteria. Then, by measuring the same criteria after deploying Oracle RightNow Cobrowse Cloud Service, you can measure its effectiveness and look for ways to continue to increase its benefits. It is recommended that at the close of each Oracle RightNow Cobrowse Cloud Service session, the customer be presented with a postsession survey through Oracle RightNow Feedback Cloud Service. This enables you to gather information on customer satisfaction and other data that may be used to calculate the various metrics for interactions, including the effectiveness of Oracle RightNow Cobrowse Cloud Service sessions versus traditional phone or chat engagements.

A successful pilot also effectively trains agents in how to use the tool and how to handle unexpected circumstances. Best practices for such training include the following:

- **Keep training sessions small.** It is generally best to start with a trial group of agents who are open to new and improved approaches. Small-group or one-on-one training is far better than large groups or relying on manuals for self-guided learning.
- **Flag potential pitfalls.** Trends will emerge pertaining to the potential pitfalls that agents should be trained to avoid. For example, before being given access to Oracle RightNow Cobrowse Cloud Service, all agents will need to have Java installed and enabled on their computers. Likewise, agents should be familiar with the process of ensuring that customers also have Java installed and enabled. Agents should instruct customers to click **Run** or **Yes** to accept the Java certificate if prompted.
- **Highlight tips for success.** A simple way to ensure success is to have agents instruct customers not to close the Oracle RightNow Cobrowse Cloud Service share window when engaging in a screen sharing session as part of a phone engagement.
- **Monitor use after training.** It is very important to collect customer and agent data to ensure proper usage and results. There should be a diagnostic assessment to ascertain whether a cobrowsing session was effective. The feedback system can also serve as a communication vehicle enabling agents to share effective uses of the new technology.

Best Practice #3: Make a Good First Impression

Anytime a new tool is added to your sales or service tool set, it should reflect your corporate branding and be integrated into your workflow as tightly as possible, giving customers a seamless transition to the new channel.

Start by customizing the Oracle RightNow Cobrowse Cloud Service consumer window to reflect your logo, style, and customized verbiage. The messaging included in this window should appropriately set expectations for customers regarding what they should expect and what action they must take. For example, it should be clear to customers whether the agent has permission to simply view their desktop or if that person will also have the ability to control their mouse and keyboard. In the case of a phone engagement, customers should be instructed to give the agent the five-digit code displayed after they select the screen-sharing link to initiate the screen-sharing session. A legal disclaimer and a privacy statement are also necessary in this window so that customers can read them before agreeing to share their screens.

Once a customer is ready to engage in a screen-sharing session, it is important to make the process as quick and efficient as possible. Oracle RightNow Cobrowse Cloud Service accomplishes this in the following ways:

- It does not require software to be downloaded or installed.
- It works with any browser on any computer.
- It does not have problems rendering any consumer page, regardless of complexity.

Best Practice #4: Ensure That Security Requirements Are Met

Customer security concerns and regulations are increasing, and customers must feel they are in control and safe in their assisted Web experiences. Therefore, it must be the decision of each customer whether to grant the agent access to the personal desktop. Oracle RightNow Cobrowse Cloud Service alleviates these security concerns in the following ways:

- It lives in the browser and does not touch the customer's hard disk.
- It does not violate security protocols, trigger pop-up blockers, or invoke security alerts.
- It neither has technical issues with firewalls nor appears to behave like malware.
- It uses only HyperText Transfer Protocol Secure (HTTPS) ports 80 and 443.
- It can restrict agent access to "view only," ensuring that a company cannot be held liable for malicious actions—thereby blocking customer damage claims.

Another common security concern includes the sharing of private or sensitive information. If pages on your Website display or prompt for information such as credit card numbers, Social Security numbers, or medical information, you want to ensure that those pages are Payment Card Industry Data Security Standard (PCI DSS)–compliant and Health Insurance Portability and Accountability Act of 1996 (HIPAA)–compliant. In some cases, that may mean not displaying that information to the agent; in others, it may simply mean that the data should not be stored in historical records. It is important for

businesses to review their Websites and to protect these sensitive data fields. By working with professional services, you can ensure compliance when working with Oracle RightNow Cobrowse Cloud Service.

Best Practice #5: Know When to Engage a Customer

A cobrowse session is often used to escalate an unproductive phone call or chat session to a more effective channel. It's critical to identify the customer-agent interactions in which cobrowsing can provide the most benefit.

Cobrowsing has been shown to provide tremendous benefit when a visual connection is needed to speed the transaction and reduce confusion. If a customer is struggling to explain some difficulty to an agent, sharing the screen will often quickly eliminate the need for a difficult and awkward explanation and enable the agent to move on to resolution. Similarly, if a customer is struggling to follow the directions of an agent, it is highly effective to share the screen and enable the agent to show the customer exactly where on a Website the user needs to navigate, enter information, or interact in some other way.

It is important to train agents to recognize the appropriate times to escalate a phone call or chat session to a cobrowsing session. Customer interactions that typically benefit from this sort of visual connection include the following:

- Helping a customer through a complex buying decision
- Filling out complicated Web forms or applications
- Referring customers to complex Web URLs
- Helping customers find and understand Web-based support information for complex products and services
- Explaining new online product or self-service capabilities

These scenarios are commonly associated with industries—such as online retailing, insurance, mortgage lending, online banking, and financial services—in which the application or approval process can be very complicated. Your business likely has other mission-critical applications that can benefit.

Best Practice #6: Provide a Good Customer Experience

There are numerous simple things an agent can do to make a customer feel more comfortable with the cobrowsing experience:

- Don't force it. Recommend when a screen sharing session would be beneficial, but be prepared to assist the customer by using the existing channel.
- Notify the customer if you intend to control the mouse or the keyboard.

- Advise the customer that you are going to move the mouse to another part of the screen. Use the mouse to trigger dynamic pop-ups or drop-downs for the customer. Once the mouse is in the correct position, instruct the customer to click or type where indicated.
- Continually communicate with the customer throughout the interaction.
- Move deliberately if you take control. Teach the customer how to do what you are doing.
- End the cobrowse session prior to ending the phone or chat engagement.
- Ask for feedback after the interaction.
- Record all pertinent information in the incident record for a complete transaction history.

Best Practice #7: Make Continuous Improvement

Exit surveys for customers should be utilized regularly to gain feedback. This feedback, combined with monthly metric reviews, will indicate whether you are meeting your original business goals and will enable you to tweak processes or provide additional agent training if need be. This feedback can also call attention to opportunities to leverage Oracle RightNow Cobrowse Cloud Service in other parts of the business, enabling you to reap additional rewards.

Conclusion

Oracle RightNow Cobrowse Cloud Service is an invaluable tool to use when other live agent engagements such as phone calls and chat sessions are not enough. The ability for consumers to share their screens with agents and navigate the Website together, fill out forms, or find information will enable businesses to increase revenue and quickly resolve support issues. Taking the time to get a clear understanding of your business objectives and to properly plan, train, and deploy the solution will increase your likelihood of success.



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Author: Carol Volk

Oracle Corporation
World Headquarters
500 Oracle Parkway
Redwood Shores, CA 94065
U.S.A.

Worldwide Inquiries:
Phone: +1.650.506.7000
Fax: +1.650.506.7200

oracle.com



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