



Genesys Engage Cloud Use Cases

Genesys Co-browse (CE27) for Genesys Engage cloud

2/26/2021

Extend voice or chat interactions with co-browse

What's the challenge?

Your customer is frustrated because they're having trouble on your website. Your agent is frustrated because he can't see where the customer is struggling. The customer has to describe what's on the screen; the agent has to articulate where to click. It's cumbersome — and results in long handle times.

What's the solution?

Improve first contact resolution by letting agents "show and tell" with your customers through a co-browsing session, using real-time annotations, comments, or even the ability to take control of the customer's screen. There's zero footprint for customer ease and content masking for peace of mind.

Other offerings:

Genesys Cloud Genesys Engage on-premises

Contents

- [1 What's the challenge?](#)
- [2 What's the solution?](#)
- [3 Use Case Overview](#)
 - [3.1 Story and Business Context](#)
 - [3.2 Use Case Benefits*](#)
 - [3.3 Summary](#)
- [4 Use Case Definition](#)
 - [4.1 Business Flow](#)
 - [4.2 Business and Distribution Logic](#)
- [5 User Interface & Reporting?](#)
 - [5.1 Agent UI](#)
 - [5.2 Reporting](#)
- [6 Customer-facing Considerations](#)
 - [6.1 Interdependencies](#)
 - [6.2 General Assumptions](#)

-
- 6.3 Customer Responsibilities
 - 7 Related Documentation
 - 7.1 Document Version

Use Case Overview

Story and Business Context

A customer and a contact center agent are having a conversation over the phone or through a web chat session. During the conversation, the ability to see and control the customer's browser through co-browsing functionality enables the agent to convey information more effectively and get the customer's issue resolved more quickly.

Use Case Benefits*

Use Case Benefits	Explanation
Improved Customer Experience	Mitigate customer frustration by providing a better method to serve and assist customers therefore reducing customer effort.
Improved First Contact Resolution	Optimize the customer service experience by opening a co-browse session with the customer to resolve their request the first time.
Increased Revenue	Reduce shopping cart abandonment and increase online conversion rates
Reduced Handle Time	Use annotations, comments, and browser control to aid quick resolution.

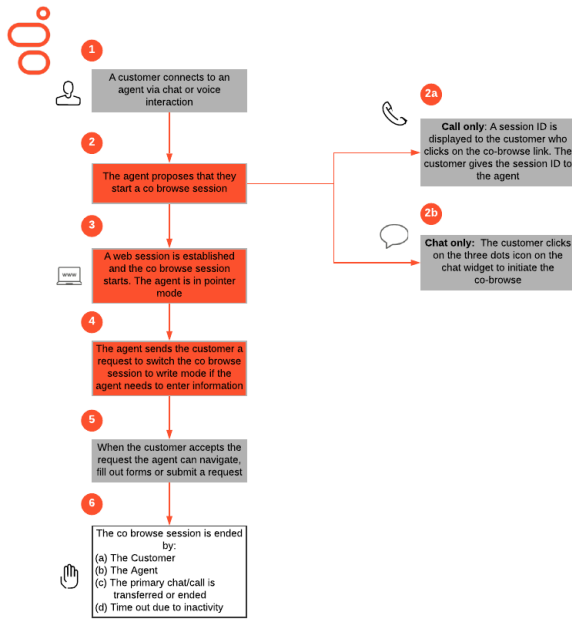
Summary

During a call or a chat session between a customer and an agent, the customer can initiate a co-browse session with the agent, so both the agent and the customer share the same instance of the browser. This session enables the agent to provide direct support to a customer trying to complete a request on the company's website.

Use Case Definition

Business Flow

The following flow describes the use case from the perspective of the customer and the contact center agent.



Business Flow Description

1. The customer and agent are connected via a chat session or a voice call.
2. The agent may propose to the customer to start a co-browse session to support them on the website. For security reasons, only the customer can open the co-browse session.
 - **Call only:** A session ID is displayed to the customer if they click the co-browse link in the Assistance/Channel Selector Widget. This session ID is needed to join the agent desktop with the correct browser session. The customer gives this session ID to the agent over the phone. The agent enters the session ID into the agent desktop to start the co-browse session.
 - **Chat only:** The customer clicks the three-dots icon on the chat widget and selects "Start Co-browse."
3. When the session is established, the agent's desktop displays a view of the website in the browser window the customer is using. Agents start co-browse sessions in Pointer Mode. In Pointer Mode, the customer and the agent can see each other's mouse pointer but the agent cannot enter any information into the webpage, click buttons, or navigate the customer's browser.
4. If the agent needs to enter information into the webpage or to navigate the browser, they can send the customer a request to switch the co-browse session to Write Mode.
5. Once the customer accepts this request, the agent can navigate, fill forms, and click hyperlinks on the webpage. Sensitive Data can be masked before presenting to the agent, and agent controls (the ability to fill certain fields or submit forms) can be blocked through instrumentation. The customer can revoke the Write Mode at any time, returning the agent to Pointer Mode.
6. The co-browse session ends when any of the following events occurs:
 - The customer chooses to end the co-browse session
 - The agent chooses to end the co-browse session

-
- The primary chat or voice interaction is transferred or ended by either the customer or the agent
 - Due to inactivity after a preconfigured time-out expires

The primary voice or chat interaction can continue even when co-browse has ended.

Business and Distribution Logic

Business Logic

Starting a co-browse session without primary interaction: Co-browse sessions take place on top of a primary interaction (in this case, chat or voice). If the customer initiates a co-browse without any primary media, the instrumentation prompts the customer to start a conversation via voice or chat before initiating the co-browse.

Distribution Logic

There is no applicable content for this section.

User Interface & Reporting?

Agent UI

The agent interface related to co-browse must:

- Enter the session ID when co-browse needs to be started from a voice call
- Automatically start a co-browse session if the session has been started by the customer through their chat widget
- Display the customer page view when co-browse is engaged

Transfer, Conference, and Supervision of co-browse sessions are not supported.

Reporting

Real-time Reporting

Minimum requirements:

- Implementation of standard templates in Pulse: eServices Queue KPI, eServices Agent Activity

Current Co-browse Agents

- Chat Agents: Number of agents working on chat
- Chat with Co-browse: Number of agents working on chat with co-browse
- Inbound Voice: Number of agents working on inbound voice
- Inbound Voice with Co-browse: Number of agents working on inbound voice with co-browse

Current Chat Interactions with Co-browse

- Chat: Number of chat interactions currently handled by agents
- Co-browse in Chat: Number of chats with co-browse interactions currently handled by agents
- (Co-browse in Chat)/Chat, %: Ratio of current number of chats with co-browse interactions to the total number of chat interactions
- Web Chat: Number of web chat interactions currently handled by agents

Co-browse in Web Chat: Number of web chats with co-browse interactions currently handled by agents

- (Co-browse in Web Chat)/Web Chat, %: Ratio of current number of web chats with co-browse interactions to the total number of web chat interactions

Current Voice Interactions with Co-browse

- Inbound Voice: Number of inbound voice interactions currently handled by agents
- Co-browse in Inbound Voice: Number of inbound voice with co-browse interactions currently handled by agents
- (Co-browse on Inbound Voice)/Inbound Voice, %: Ratio of current inbound voice with co-browse interactions to the total number of inbound voice interactions

Co-browse Session Details

- Current Agent State: Auxiliary statistic needed for user data retrieval
- Co-browse Session State: Alive or finished
- Co-browse Session Start Time: Session start time
- Co-browse Session ID: Session ID
- Co-browse Session Quantity: Session quantity

Historical Reporting

Minimum Requirements:

- Support of Genesys Info Mart and Genesys Customer Experience Insights

Co-browse Detail report provides details on any Co-browse session.

- Agent, Queue, Day, Media Type, Interaction ID
- Session ID, Co-browse start/end times, related Interaction start/end times, durations

- Modes used, modes start/end times
- Pages (URL) co-browsed

Co-browse summary report provides a higher-level view of Co-browse usage.

- Agent, Queue, Day, Media Type
- Count of Interactions with or without Co-browse, number of Co-browse sessions
- Count of sessions with Write mode invoked
- Average Handle Time for Interactions associated with Co-browse
- Average Duration before Co-browse sessions started

More reports will be made available in the coming months.

Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

All of the following required:	At least one of the following required:	Optional	Exceptions
None	<p>Digital</p> <ul style="list-style-type: none"> • Genesys Chat Routing (CE18) • Genesys Digital Callback (CE22) <p>Inbound</p> <ul style="list-style-type: none"> • Genesys Call Routing (CE01) 	None	None

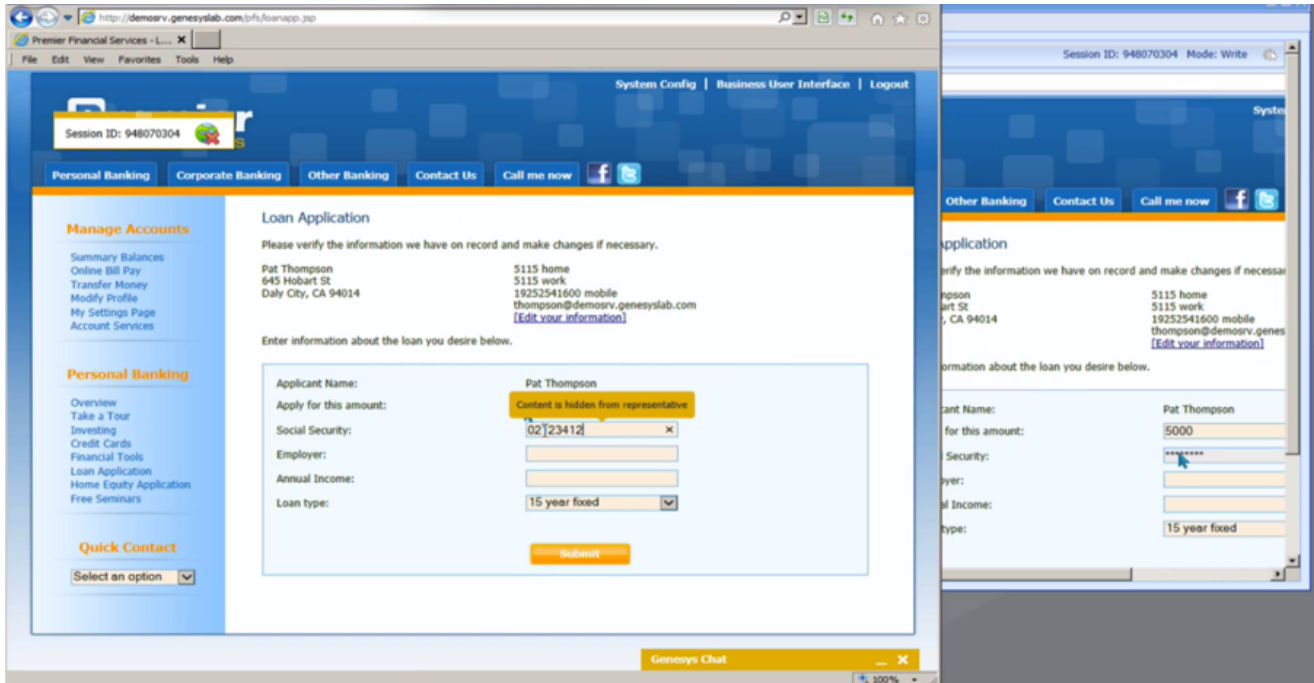
General Assumptions

All features described in the use case are supported in Genesys Engage cloud.

Customer Responsibilities

- The Genesys customer is responsible for integration of the solution into the company website.

- The Genesys customer is responsible for tagging information and fields on their website that need to be hidden from the agent during a co-browse session, or agent controls that need to be blocked (such as a Submit form). This responsibility is achieved with the DOM Restrictions Editor User Interface.



- Customer's website is instrumented with Genesys Widget and includes Co-browse instrumentation script.
 - Use of Genesys Widget is the recommended in most use-cases. If Genesys Widget cannot be used, the Customer can use Genesys Co-browse JavaScript API, as an advanced capability, to include Co-browse on their website.

Related Documentation

Document Version

- V 1.2.2