



INTUIT

Glance Makes Customer Interactions Less Taxing for Intuit

The taxpayer was stumped. Anyone who has ever filed a tax return can sympathize ... but because this taxpayer was using TurboTax® software by Intuit, when he reached out for help, he experienced a level of collaboration that surprised and delighted him.

"I spoke with a TurboTax agent. They had me share my screen ... Instantly, they could see everything in my TurboTax window and I saw my agent. I got the answer I needed faster and easier than I expected. It was so good I felt like there was a tax angel on my screen."

Powered by Glance's visual engagement technology, Intuit's SmartLook™ feature has provided a powerful business advantage by literally putting experts and customers on the same page — and doing so instantly.

About Intuit TurboTax

Approximately 33 million taxpayers use digital technology to prepare their taxes, and Intuit's TurboTax is the premier tool of choice for many. That's why TurboTax products have continuously ranked as the #1 best selling tax software for more than 25 years. TurboTax now combines the on-demand help of a tax expert and the power of Glance Guided CX solutions to give customers a smarter, more personalized filing experience. Thousands of TurboTax customer reviews have given the product an overall rating of 4.7 out of five stars.

Among its legions of devoted users, TurboTax is known for providing an "intuitive interface that makes it easy to file taxes online and get the best return you can." Customers don't need to know anything about tax laws or forms to get their taxes done right. TurboTax asks simple questions about your life like, "Did you get married?" or "Did you have a baby?" They then personalize the filing experience so taxpayers get every deduction and credit they deserve based on their answers.

Adding Glance

Intuit enhances the online tax experience further by deploying a one-way video connection that allows customers to ask questions, while the experts can see only the user's TurboTax window. Intuit's tax experts can visibly highlight on-screen areas to address questions or enter more information. The goal is to streamline how fast TurboTax experts can provide nurturing expertise and crucial answers to get customers moving forward successfully through the tax prep process.

Customer Name

Intuit

Market

Business and Finance

Results

- Improved Intuit's Customer Resolution Rate by 10%
- Increased Transactional Net Promoter Score (tNPS) by 18%
- Reduced Average Hold Time (AHT) by more than 15%

“Not everyone loves doing their taxes; we know that. With SmartLook™, we have the ability to have our experts see what the customer sees and highlight areas to help direct the customer. Our one-way video lets the customer connect the TurboTax expert they are speaking with. It's been a gamechanger for Intuit.”

Senior VP, Centers of Excellence
Axos Bank

This capability, dubbed SmartLook™, takes TurboTax collaboration to a new level of customer confidence. Help is delivered visually on-screen by a live TurboTax expert who can draw, annotate, and highlight items directly on the user interface. Through one-way video, customers can see the experts working on their behalf. Intuit calls this unprecedented level of collaboration “a game changer.”

Crucial advantage

Intuit chose Glance Guided Customer experience solutions to allow thousands of Intuit experts to collaborate easily and quickly with TurboTax customers. Unlike traditional screen sharing solutions, Glance’s patented cobrowsing technology controls what content is shared. After gaining permission from the customer, experts can instantly view content within the customer’s TurboTax browser window with no lag time. Glance supports any device, mobile or otherwise.

Intuit’s experts can visually illustrate and augment their verbal guidance to users by circling, highlighting, and emphasizing important points directly within the browser window, which is known as “gesturing” in Glance. They can indicate where key elements are located in the user interface. They then clarify how to fill in information and best exploit the many options offered by TurboTax’s step-by-step tax preparation process.

Intuit found just what it was looking for in Glance’s cloud-based cobrowsing technology: a global solution with encrypted local session services requiring no application downloads or Java code to be installed on a user’s device. A crucial advantage was the Glance solution’s ability to automatically prevent experts from seeing the user’s personal information, ensuring security by preventing “masked” or redacted data from ever leaving the customer’s browser.

Same page

With Glance’s market-leading visual engagement solutions, Intuit’s SmartLook™ feature allows experts to engage instantly with TurboTax customers and see the actual screen the user is stuck on. SmartLook™ allows conversations to become immediately relevant to the user’s issue, without going through the awkward and confusing verbal Q&A process that is common in traditional customer support sessions (“What do you see on your screen?” “Can you find this field?”).

Initially, Intuit rolled out the SmartLook™ capability to thousands of experts across 15 different locations, conducting more than one million customer interactions with dramatic results:

10% improvement in Intuit’s Customer Resolution Rate

18% increase in Transactional Net Promoter Score (tNPS)

15% reduction in Average Hold time (AHT)

Remarkably, Intuit’s Net Promoter Score (NPS) was higher than Uber, Google, and Microsoft Office.¹

Personal touch

Frustration levels often derail the online tax preparation process. Glance empowers a new level of online experience for TurboTax users. It has eliminated the game of “20 questions” that often precedes an agent and user getting on the same page. Intuit agent productivity has increased because of SmartLook™. The company can now focus their time and expertise on resolving issues and adding value, rather than struggling to get in sync with users and engaging in longer explanations.

¹ <https://www.netpromoter.com/something-to-love-about-taxes/>

To us, just because you’re using digital technology doesn’t mean that the interaction has to be impersonal. Intuit is full of people who care passionately about our customers, and visual technology takes the human element leaps and bounds forward in the experience.

Stacie Herring
Intuit’s Director of
Assisted Experience



In a study of 1,800+ CX companies, Metrigy named Glance a 2022 Top Performer for Visual Engagement.



Glance makes it easy to provide personal, human-to-human customer experience in digital environments. Glance’s in-the-moment web and mobile cobrowse, screen share, and video solutions increase customer satisfaction, ensure brand loyalty, and drive revenue. The world’s largest enterprises trust Glance to empower their customer-facing teams and deliver frictionless, at-the-exact-right-moment customer consultation. With integrations with Salesforce, Twilio, Genesys, ServiceNow, and more, Glance fits seamlessly into even the most sophisticated CRM-CX tech stack. Discover the power of Glance guided CX at <http://www.glance.net>.