



GLANCE GUIDED CX

The #1 Cobrowsing Solution in Financial Services

Recreate in-person experiences digitally with Glance



Support

Technical and transactional support at critical moments

Allow banking representatives to guide customers through online account questions and transactions.

- Password changes
- "How-to" questions (deposit a check online, navigate an app or website, etc.)



Higher CSAT rating



Better customer retention



Reduced call handle time



Connect

Loan applications, new account or credit card applications, etc.

Empower loan officers to join borrowers on-screen for guidance during the application process.

- Fill out forms together; locate, upload, and review paperwork
- Provide guidance through a tricky or high-value process



Lower abandonment rate



Higher employee satisfaction



Less customer churn



Advise

Wealth management, tax questions, financial consulting

Enable financial advisors to deliver expertise, helping customers navigate investment choices.

- Navigate investment site, understand choices
- White-glove service, expert advice



Higher NPS



Improved net new revenue



Higher lifetime value

FinServ Customers Get Results

Higher CSAT with "Do It Together" digital banking

At a top-five bank in the U.S.

SOLUTION: Guide online transactions (opening accounts, depositing checks)

RESULTS: 1 in 4 customers have experienced Glance, resulting in a 97% satisfaction rating

"Digital technology coupled with a human connection allows us to help our clients in different and profoundly important ways."

A human approach to online investing

With a top U.S. wealth management company

SOLUTION: Increase efficiency during advisor support, portfolio reviews, and password reset resolution

RESULTS: \$18M+ net new revenue, 14% improvement in call handling time, 13-point increase in CSAT

"Enabling our advisors to join customers wherever they are to guide them is changing how we work with our customers and grow the business."

Improve customer loyalty with digital interactions

Bankers join customers in online banking app

SOLUTION: Guide customers through bill pay, fund transfer, and banking product applications.

RESULTS: Decrease billing-related calls, increase autopay enrollment, and drive new web portal registrations.

"Guided customer experience helps to reduce both frequency of calls and cost per call, creating operational efficiency and overall satisfaction among customers and agents."

Benefits administration support for employers and members

At a top SaaS provider for employer-managed HR benefits

SOLUTION: Customer support and client onboarding for members and employer administrators.

RESULTS: Launched from call or chat, engagement duration drops 17.6% on average.

"We have the ability to have our experts see what the customer sees and highlight areas to help direct the customer. ... It's been a gamechanger."



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>.

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