



INDUSTRY SPOTLIGHT: FINANCIAL SERVICES

Grow deposits, loans, and assets under management with Glance

For over 20 years, the world's largest financial institutions have trusted Glance Guided CX™ to transform "do it yourself" into "do it together" by powering human connections inside mobile apps, account portals, and websites in moments that matter.

Create "wow"-worthy digital experiences, striking the balance between AI and human CX.

Easy for everyone, works everywhere

Launch Glance from any employee desktop solution to connect instantly with customers in your mobile apps, portals, or websites.

Start from anywhere, switch seamlessly

Use existing communication channels, including routing and escalations, to start collaborating from any interaction with Glance capabilities such as:

- Mobile app share
- Cobrowse
- Secure document share
- Live one-, two-, or multi-way video
- Screen share
- Mobile camera share

Proven, enterprise-grade security and scale

Glance adheres to rigorous data privacy and security protocols, undergoes annual compliance audits, and is verified by the largest financial institutions.



Glance enables your experts to deliver in-the-moment, personal guidance to help customers:

Open an account (checking, savings, credit card, etc.)

Set up direct deposit, fund transfers, bill pay, etc.

Apply for loans (auto, mortgage, business, etc.)

Manage investment and retirement portfolios

Select, establish, and use merchant services

Understand financial products, tools, and resources

How financial institutions elevate CX and achieve results with Glance

Top bank delights customers by bringing the human touch to their digital experience

This U.S.-based bank transforms digital customer experiences from “do it yourself” to “do it together,” helping customers complete online transactions such as opening accounts, depositing checks, applying for loans, and more. It leverages the in-brand collaboration capabilities of the Glance Guided CX platform across multiple domains on desktops and mobile devices. One in four of its online banking customers uses Glance.

Outcomes: 97% customer satisfaction (CSAT) and 98% reported feelings of accomplishment for Glance-enabled interactions, increased employee satisfaction (ESAT), and increased trust in the bank.



Major wealth management firm sets customer experience bar for financial advisory services

A top wealth management company advises over 50 million individuals with financial planning, advice, and educational resources, guiding them on how to make their goals a reality. It leverages Glance Guided CX during advisory interactions regarding life moments (weddings, births, deaths, job changes, etc.), long-term financial decisions (401Ks, stock allocations, health insurance, and HSAs), wealth transfers, and new client consultative sessions. Once customers experience Glance, they frequently request it in future collaborative sessions or when needing assistance on digital properties.

Outcomes: Increased customer sentiment, satisfaction, and NPS® scores, deepened client relationships and trust, and increased new prospect conversion and asset retention.

Outcomes from industry-leading brands

20%
reduction
in AHT

10%
boost
in FCR

18pt
increase
in NPS

20%
higher
CSAT

60%
reduction in
sales cycle time

40%
boost in lead
conversion rate

97%
satisfaction
rating

394%
return on
investment



Glance Guided CX™ helps enterprises earn, keep, and grow customers through instant, personal, human-to-human collaboration sessions within their mobile apps, portals, and websites. Glance is easy for everyone and works on any platform or device.

The world's most recognizable brands trust Glance in moments that matter to build relationships, increase revenue, and boost customer lifetime value. Discover how to create wow-worthy human CX at <http://www.glance.cx>.

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