

EBOOK

Guided CX in Mobile Apps: Best Practices with Glance



Introduction: Customers Love Mobile Apps

Can you name one communications channel that's;

- Seldom, if ever, out of arm's reach?
- Used 3.5 - 5.5 hours per day?¹
- Preferred by nearly 2/3 of us to engage with websites?²

If you said mobile devices - you're right.

Customers love mobile apps. Which is why they dominate the way we shop, bank, and interact with brands: both B2B and B2C.

In this ebook, read about the innovative ways companies use Guided CX to deliver standout mobile experiences.



What is Guided CX?

Guided CX (Customer Experience) leverages interactive technologies so a company's agents can literally join their customers in websites or in apps, guiding their navigation and form-fill processes, advising on critical transactions, and supporting product questions or issue resolution.



Guided CX in Mobile Apps: Best Practices with Glance

Chapters



#1 Capture mindshare

The power of a great mobile experience

When a company offers a great mobile app, they put their products and services right at their customer's fingertips all day, every day: literally.

We check our mobile phones maybe hundreds of times per day, and every app gets a (smaller or larger) piece of that mindshare.

Think about how many times you used to go into your bank's branch per week - vs. how many times you check their app per week - or per day, now.

Make no mistake about it, mobile apps BOOST our interactions with brands.

With Glance, "We also got amazing feedback from our agents on how much easier it was to help customers through difficult situations with both configurations and troubleshooting."

– Director of Customer Service Technical Operations, Restaurant Point-of-Sale Software and Hardware company

GET CREATIVE WITH GLANCE:

Powering mobile app innovation for B2B - not just B2C - companies.

Did you know? A Restaurant Point-of-Sale Software and Hardware solutions company meets its customers' needs for training and technical support using Glance. Glance Mobile App Share powers better onboarding and support; Glance Mobile Camera Share lets company representatives help customers with hardware set up and troubleshooting, and Glance Agent Video helps to create more warm, personalized experiences.

The results? Glance supports ...

- 100% of training interactions
- 800 agents
- 20% higher CSAT than non-Glance interactions



#2 Be memorable to compete

Great opportunity = greater competition.

The last best experience that anyone has anywhere becomes the minimum expectation for the experience they want everywhere.

- Bridget Van Kranlingen, Sr VP, IBM Global Markets

That means your competition on mobile is not just limited to your industry. Your competition is any company with a great mobile experience - and the more innovative and memorable apps become, the more time customers spend on other apps - and not on yours.

BEST PRACTICES CHECKLIST: Ask yourself and your teams



What can your app do that no one else's can?



What expertise does your company (and your customer service team) offer that no one else does?



How can your app better connect users with your brand, your representatives, and the knowledge and services only you can offer?

#3 Create continuity

One more "way in"

Your app is an extension of your business. Apps reflect your brand and "feel like" your website, or even your in-person experiences, creating continuity and ease-of-use through familiarity for users.

Offer options

No one loves a must - when you must "download our app" or "go to our website" - instead, great apps offer options so users can engage in the ways they choose.

Do not annoy

Remember - apps with constant notifications, daily "download the update" obstacles, or old-fashioned UIs put them one step closer to that single click it takes to uninstall.

Beter CX creates value

- **20% improvement** in customer satisfaction
- **15% increase** in sales conversion
- **30% increase** in employee engagement

- McKinsey

#4 Avoid the pitfalls

Don't be vulnerable to these app pitfalls

Customer expectations don't always match mobile app realities. Check out a few of these potential incongruities to be sure your design doesn't fall victim.



Customer expectations

Continuity with website

Ease of use

Personal connections

Mobile app experiences

MVP is launched

You know the drill: customers expect an app to have all the same functionality of a website - but in reality, sometimes the "minimum viable product" goes out the door, which often means it's lacking expected features.

Frequent updates

As companies release those updates, prompts pop up so you'll update to the new version - and the new version ends up moving your favorite buttons.

Incongruous help

And when we're reaching out for help, all too often all too often the support team doesn't know whether we're in the app, the website, or the product offering - is it even the same support team? The same support technologies? It can take a while to work it out. It only takes one or two of these pitfalls for your customers to abandon your app - and, as the saying goes, we seldom get a second chance to make a first impression.



#5 Design for CX, not just UX

CX - Customer Experience - is more than the look and feel of an app. It's what happens when it doesn't work. It's all the steps a customer must take with a company to reach their goals - the journey they are on to accomplish something - and how your app fits in their journey.

CX is the sum total of a customer's experience with your company: from the marketing channel that brought them in, to the website and app they engaged with along the way, to the product they ultimately decided on, to what happened when they used it (and when it failed to work).

CX and Mobile Apps: remember - your mobile app is a step along the customer journey that can better connect your company with your customers.



BEST PRACTICES CHECKLIST:

Are you optimizing the customer journey whenever - and wherever - they need you?



On your website:
Can customers reach out in a variety of ways when they're stuck?



In your product:
Is product "help" and "how to reach a person now" visible and obvious, on every page?



In your app:
Is there a single, consistent customer (and agent) experience between your website, your app, and your product, or are agents just as confused as customers are when they reach out for help?

#6 Personalize, personalize, personalize

Mobile apps reflect customers' priorities:

Our devices hold everything from our favorite recipes to our favorite pet (oh, and people) pictures - from our friends' contact info and concert tickets to our playlists and shopping lists. They are insanely personal - and finding a space on their device for your company's app is a personal choice on the part of your customers - demonstrating they prioritize you.

So, what can your app do to prioritize your customers?

We love an app that knows us when we return - respecting security above all else, of course - and when we're stuck with a function, a transaction, or a technical glitch somewhere in that app, we love help that's delivered in-context, by a person, without extra clicks, and without backing out and starting over.

In the same way, does your support team know your customers?

Or, do they need to repeat their needs to each person they meet with, in succession? Personalizing help - on your website, in your product, and in your app - with a real person who can join them in the app to offer guidance or advice, is the ultimate in personalization.

Connect your agents with your customers, in your app and with nothing to download - ever. Video chat with customers while guiding them (gesturing) onscreen through your app.

Glance Mobile App Share makes it possible, with an SDK y our development teams use to configure and customize the mobile app share experience for your customers.



#7 Elevate support

Look: we know it's not glamorous. But when something goes wrong, people reach out for help. And when they need you, you should be there. Yes, even in mobile apps. It's part of the overall experience - remember, it's about CX, not just UX - and the ability to reach out for help within a mobile app, just like within your website and desktop products - is important to building mobile app adoption and ongoing use.

Cost center or value driver?

Transforming your support agents from merely "a cost of doing business" to "a value driver accelerating business opportunity" is all about how available they are to customers. And arming them with better tools to do their jobs can make it easier for them to communicate with customers. Speeding up problem resolution doesn't have to mean getting customers off a call as quickly as possible. Happier customers are often happy to talk about other topics - giving agents a chance to offer new features and products and inviting upsell and cross-sell opportunities. Your agents have more time to teach customers about existing features and to avoid future support calls, or ask customers what new features they'd like to see next in the app - creating new loyalty and renewal opportunities. Your customers are your most valuable resource - supporting them in your apps, and everywhere else, shows them that.



Arming agents with better tools to do their jobs can make it easier for them to communicate with customers

BEST PRACTICES CHECKLIST:

Every channel, anytime:

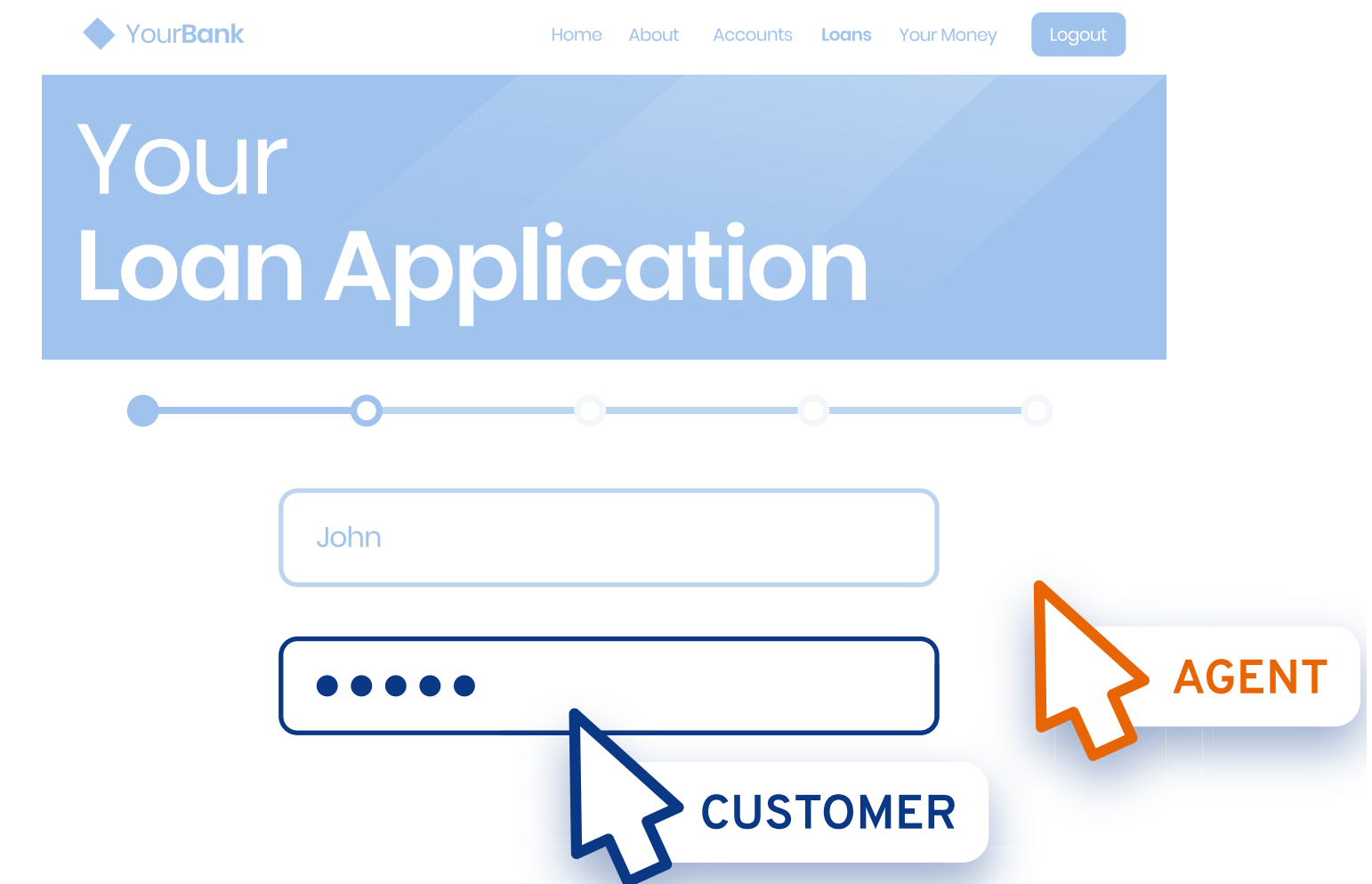
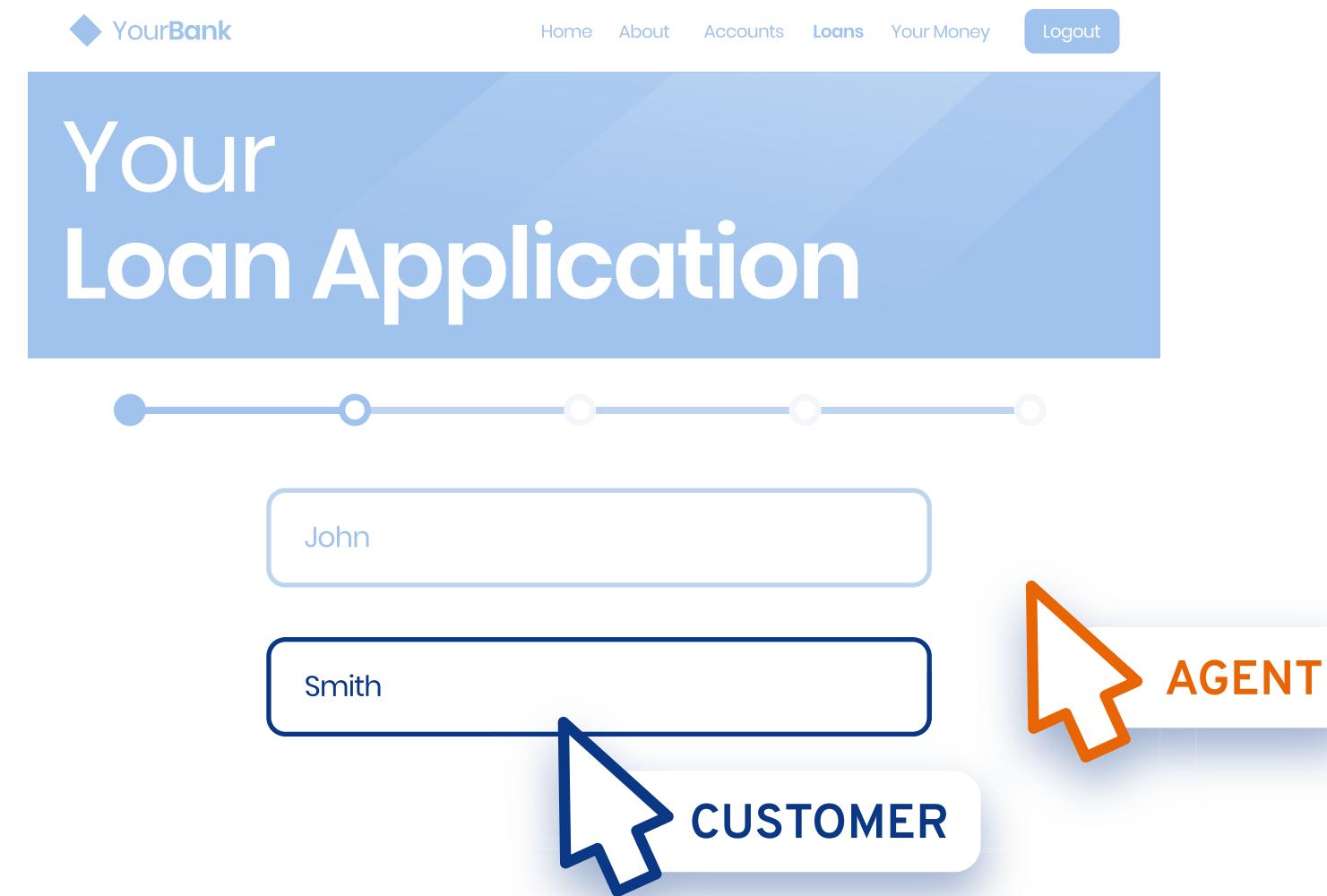
How do your customers want to reach out? Does your app cover all the bases today? Here's a list of customer favorites – see how many you offer:

- Text Message SMS
- Social media / DMs
- Email
- Scheduled Meeting/ Call Time
- Web-based Chat
- In-app Chat
- Cobrowse
- Screenshare
- Live Video Chat
- Mobile App Share
- Mobile Camera Share

#8 Prioritize security

Picture this: Your customer and your agent are engaged in a mobile app share session ... when suddenly, a customer's personal information in the app pops up. With Glance, this never has to happen. Your app developers indicate data (fields, text, etc.) that are masked from the agents' view. That information is never communicated, and therefore never stored. Customers still see it, but agents can't: protecting privacy for PII and ensuring companies comply with industry requirements.

Both customers and agents are protected. With Glance, when customers navigate away from a site during a mobile app share session, agents' view of their screen is obscured with a note that the customer has navigated away from the site. No personal information from the customer's phone is visible during the mobile app share experience: just the company's app.

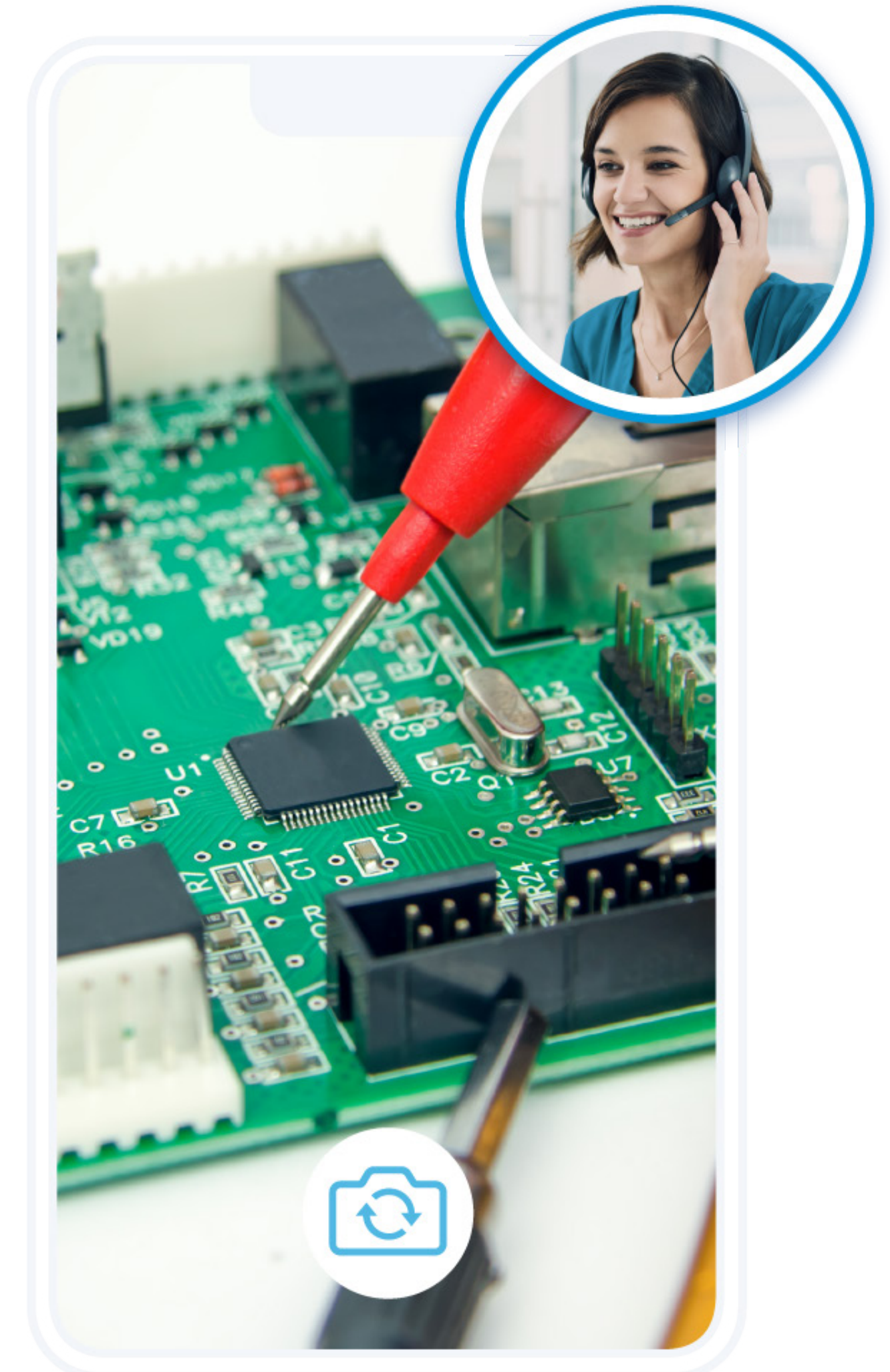


#9 Capture the opportunity mobile offers

Mobile apps can be many things to a company:

- **Product** - another way to deliver your products and services and services. In some case, your app is your offering!
- **Product companion** - a mobile app can add value to your product or service offering
- **"Freemium" (or trial version) offering** - customers get used to using your product (the app) and sign up or pay to extend the service they've grown to love
- **Marketing** - an extension of your website, that customers can access when they need them
- **Portal** - your customers' favorite way to "log in" that keeps your products, services, subscriptions, marketing, or other offerings front-and-center for them
- **A means to deliver support** - make use of the extended features of mobile (phone, text, camera) to connect with customers and help them on their journey with your products and services.

With Glance Mobile Camera Share, agents send a link for customers to click on and share their camera, to give the agent a view of their environment. Use cases range from retail sales "what matches with this?" to hardware support "how do I fix this?" and everything in between.



#10 Innovate with mobile apps

The easiest tech to use - and the tech that customers reach for first - is often the most complicated and innovative on the back end. We'll more quickly adopt what we love to spend time doing (using mobile apps!) - and as companies compete to offer the next indispensable app, customers will get used to those experiences and in turn push companies to advance their approaches and innovate their apps once again.

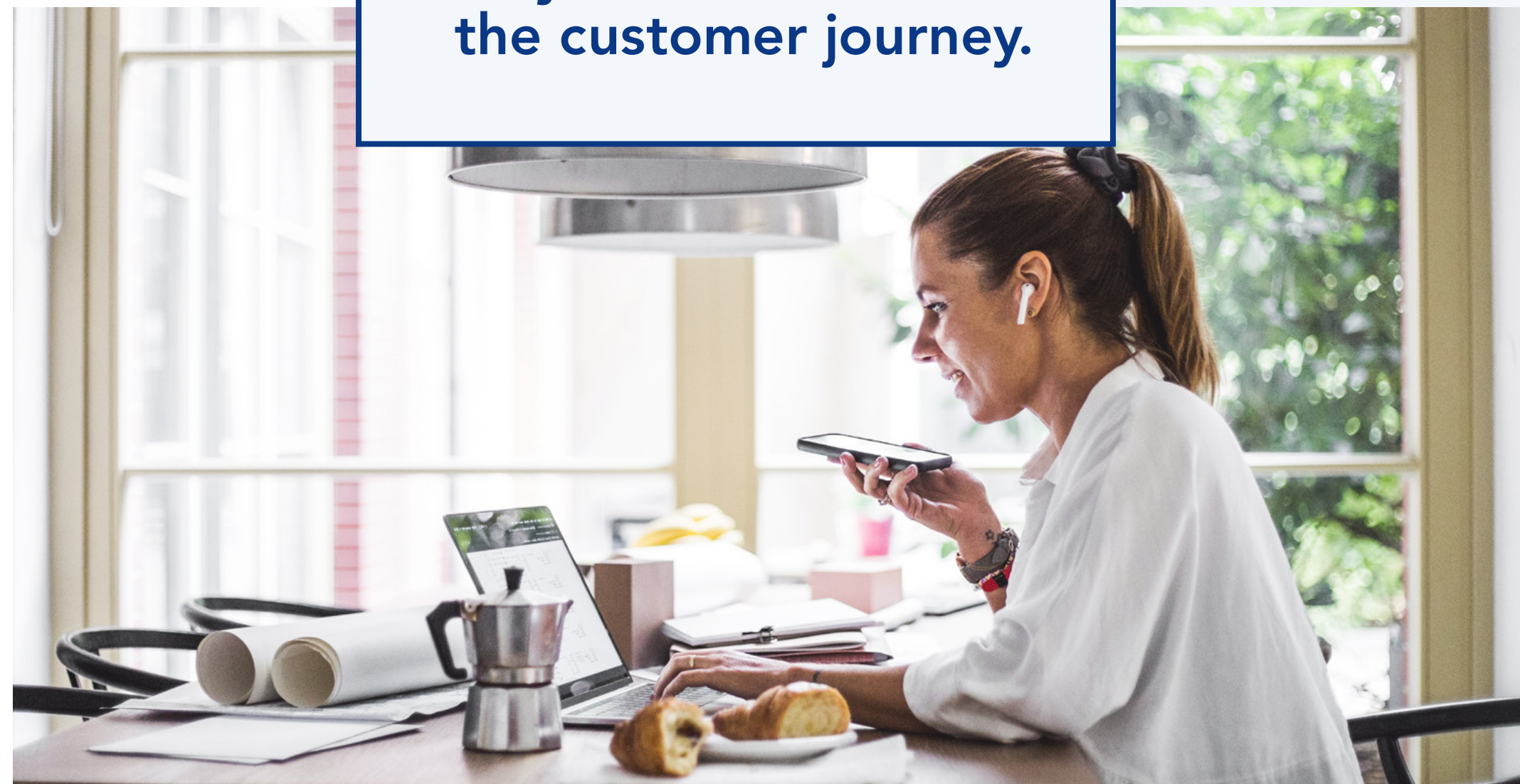
As companies compete on experience, apps may even take the lead - advancing to the forefront of a customer's journey with their brand.

Conclusion

What will never change? The need to connect, person to person (not just person to app). The place we connect most, our mobile phone - or, rather, our mobile phone, text, social media, messaging and live video chat device - reflects the way we want to connect most - with other humans. And when businesses can find new ways to deliver those person-to-person connections securely via an app, they can ensure they are meeting customers exactly the way they want to be met.



As companies compete on experience, apps may take the lead in the customer journey.



GET STARTED

Why Glance is different...



A frictionless experience for your customer

Provides a seamless, branded Guided Customer Experience that requires no downloads and launches in under 5 seconds.



And frictionless for your subject matter expert, too

Glance easily integrates with any CRM, agent desktop or contact center tech. Sharing sessions are automatically logged in your CRM for measuring impact on KPIs.



Protected by state of the art security for customer trust (and regulator reassurance)

Sensitive information is automatically masked, so your experts never see what they're not supposed to. Glance passes every InfoSec audit.



GET IN TOUCH

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