

The Value of Guided CX for Financial Services

- **CHANGE THE GAME** with memorable in-brand customer experiences
- **REDUCE CUSTOMER CHURN** and improve customer loyalty with new upsell and cross-sell opportunities
- **DRIVE MEASURABLE** business value with better agent productivity and new revenue opportunities

Financial decisions are among the most personal, emotional - even vulnerable - decisions people make in their day-to-day lives. When your company strives to support such fundamentally human transactions in digital spaces, there's bound to be heightened emotions, fears, and frustration - which can even lead customers to abandon your brand altogether.

Enter guided CX (customer experience). When the customer experience is elevated, financial services companies not only improve customer confidence, they build trust in their brand and foster valuable life-long relationships with their customers.

In this infographic, learn how one financial services company creates stand-out customer experiences with Glance using visual engagement solutions.



IMPROVE revenue by **22%**



SAVE on operating expenses by **15%**



BOOST customer satisfaction by **26%**



INCREASE agent productivity by **28%**

What is Visual Engagement?



Live Video Chat

Representatives and customers can see one another's faces to better communicate and build trust right inside your website or application: no software downloads required.



Mobile App Share

Live video and cobrowse working natively inside your existing mobile applications.



Cobrowse

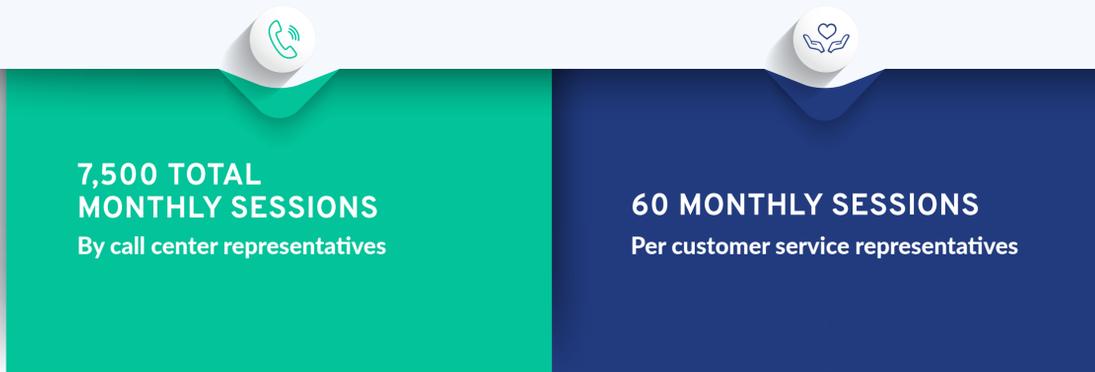
Representatives can see what customers see onscreen, and use cursor "gestures" to guide their navigation within and across pages.



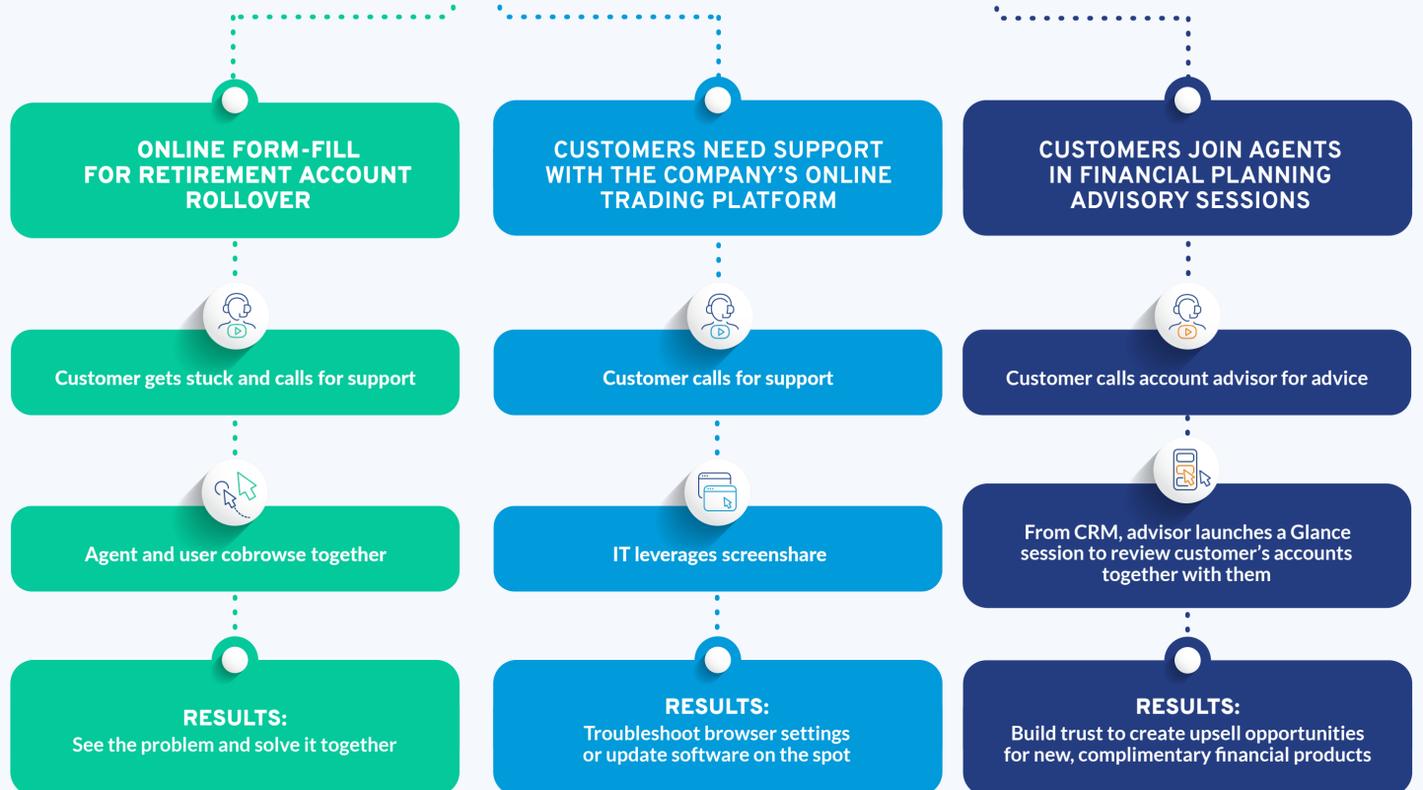
Screen Share

Representatives and customers can grant or request permission to share their screens with one another.

USE OF VISUAL ENGAGEMENT BY THE NUMBERS: Financial Services Company



3 EXAMPLE USE CASES:



One of our credos is seeing our business through the client's eyes, and cobrowsing is one way we do this.

Cobrowse helps deepen the trust clients have in the firm's services and helps agents realize upsell opportunities with customers.

To learn more about these and other customer successes with Glance in the Financial Services and Banking industries and beyond, read the [Metrigy Financial Services BVA report](#) or visit glance.net