

4 Key Trends & Predictions for Finance CX Leadership in 2023

Meet customers where they are and boost your brand for the coming year.

AI will continue to accelerate change as shifting consumer demands transform the landscape. Here's everything you need to know to win the CX game in 2023 and beyond.



#1 The New Normal is here to stay



Post-pandemic consumers expect fully remote banking - yet 53% rank real-person trust as "most important" after cost.



In 2023, financial CX will follow the convenience-focused trends of retail, with an increasing number of touchpoints shifting to chat and mobile support.

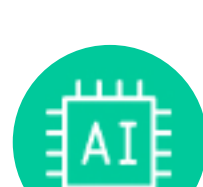


More than half of corporations cite digital CX engagement as a key factor in maintaining - or losing - consumer trust

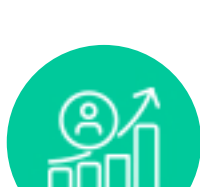


Nearly 4,000 U.S. banking branches closed in 2021 in a shift to online service

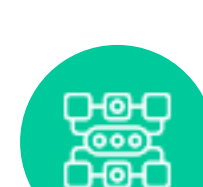
#2 AI adoption will continue at a rapid rate



The promise of artificial intelligence is very real for CX leaders, but not everyone's on board.

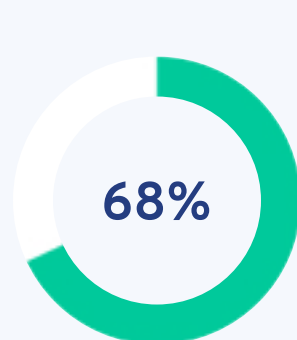


Early adopters report strong benefits across all support channels and improved post-interaction metrics.

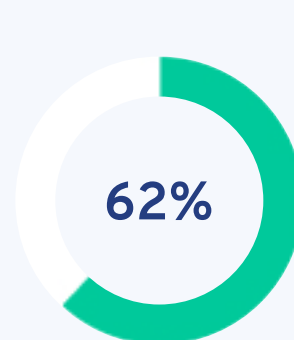


The most popular applications of AI include answer shortcuts, smart scripts, interaction routing, and representative assistance.

EARLY AI ADOPTERS REPORT:



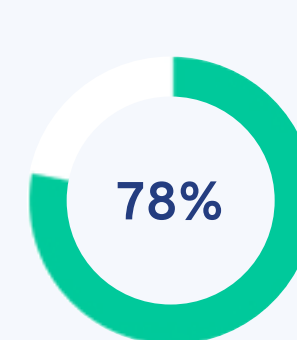
Improved CSAT



Reduced customer effort



Reduced cost to serve

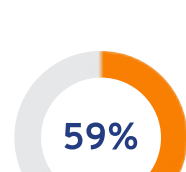


Intention to use AI for post-interaction analysis

#3 Predictive tech will drive increasingly empathetic support



Empathy has been a CX buzzword for years, but consumers aren't always feeling it.



59% of US consumers say companies have lost touch with the human element of customer service.

TO DEMONSTRATE EMPATHY -

leading companies understand the customer's needs with predictive technologies and segmentation.

TO ENSURE EMPATHETIC SERVICE -

leading CX designers integrate human interaction and provide agents with meaningful assistance.



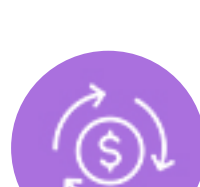
✓ 62% of companies who deployed AI saw an increase in ESAT

✓ Every 1% increase in ESAT correlates with a 1.3% increase in CSAT scores

#4 Focus on ROI will eclipse all other CX



Most companies track 50-200 CX metrics across multiple departments with scattered stakeholders coordinating reporting.



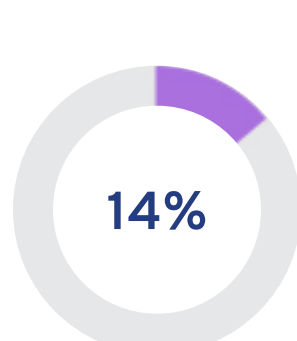
But in the end, ROI will be the only metric that matters - it's where the rubber meets the road.



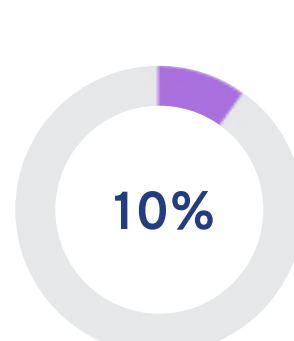
ROI represents the sum total of CSAT, agent efficiency, revenue, and more - all rolled into one.

Glance Guided CX solutions are yielding remarkable returns for industry leaders.

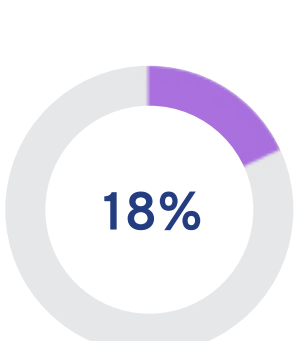
PROVEN BENEFITS OF GLANCE GUIDED CX:



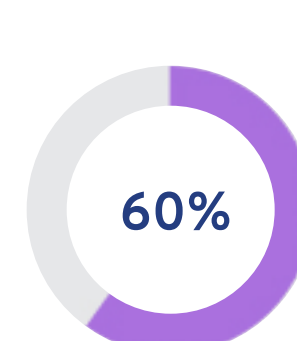
reduction in handling times



reduction in future support calls



increase in FCR



lower sign-up time for new products

These powerful efficiencies make **Glance** the **#1 choice** for executives at industry leaders such as **INTUIT** and **charlesSCHWAB**

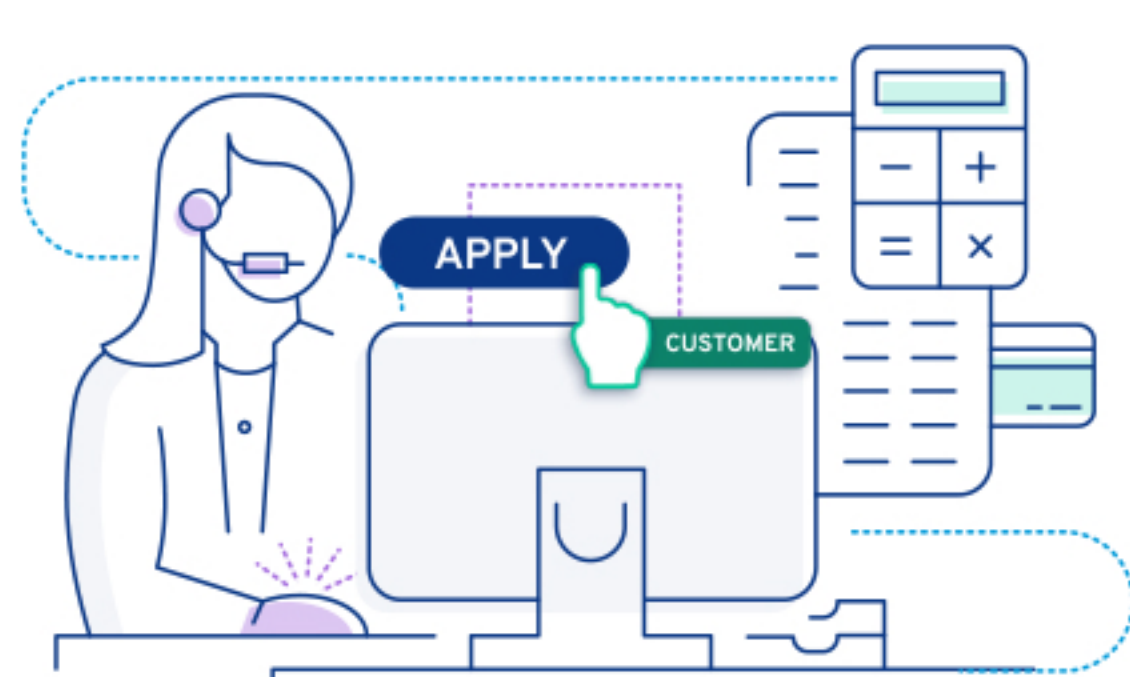
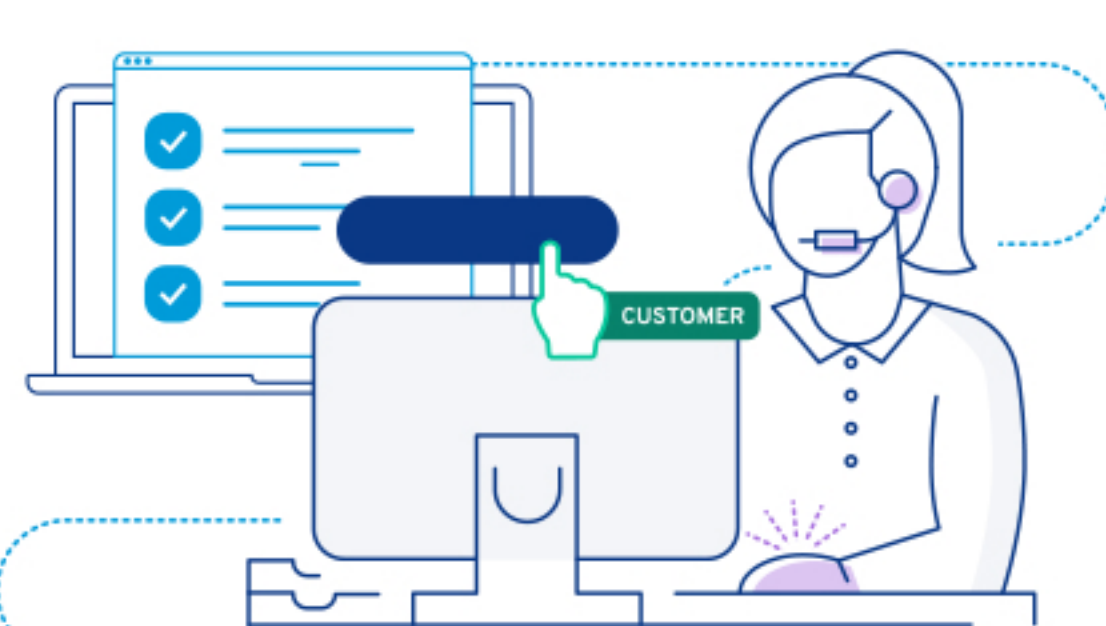
Identify the customer's problem and solve it together

A QUICK GLANCE AT HOW GLANCE GUIDED CX WORKS:

ONLINE FORM-FILL FOR 401K ROLLOVER

- 1 Customer gets stuck and requests chat
- 2 Agent and customer cobrowse together

→ Problem found. Time saved.



CUSTOMER JOINS AGENTS IN FINANCIAL PLANNING SESSION

- Customer calls account advisor for guidance
- From CRM, advisor launches a Glance session to review customer's account together
- Trust built. Upsell opportunities created.

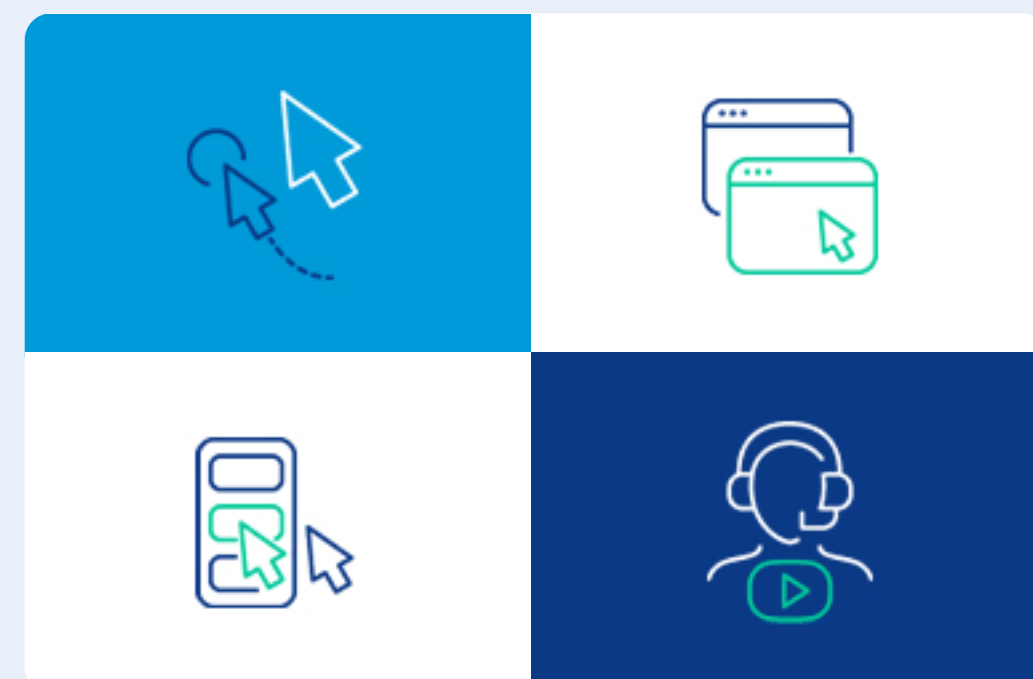
TECHNICAL SNAFU WITH ONLINE TRADING PLATFORM

- Customer calls for support
- IT leverages Glance for troubleshooting
- Customer updates software to resolve issue



Ready to experience Glance Guided CX for yourself?

Schedule a demo today and discover how easily Glance integrates with your existing CRM and contact center solutions.



[SCHEDULE YOUR DEMO](#)