



Making the Case for Guided CX

Transform customer service from a cost center to a revenue generating engine





Technological advancements like AI have undoubtedly propelled companies forward, offering innovative ways to connect with customers and streamline operations. However, amid this digital transformation, a critical human connection gap has emerged, one that can no longer be overlooked. Despite the proliferation of tech-driven customer touchpoints, customers increasingly yearn for authentic, human interactions. This is where Guided CX steps in, bridging the divide between technology and humanity.

It's essential to understand that Guided CX isn't just a feel-good concept; it's a bottom-line booster. By infusing the human touch back into the customer journey, Guided CX fosters deeper connections, cultivates customer loyalty, and ultimately translates into increased profits. According to Gartner, 66% of businesses say they compete solely on CX.

70% of customers abandon online transactions because of a bad UX (PWC)

In high-stakes moments when customers are faced with making important decisions in a digital world – applying for a mortgage, reviewing health insurance claims, making a new investment – they crave one-on-one human guidance.

Roughly 70% of customers abandon online transactions because of a bad user experience, according to PWC. In forward-thinking organizations, Guided CX is a strategic imperative in an era where customers want both the efficiency of technology and the authenticity of human interaction.

DIGITAL EXPERIENCES ARE FALLING SHORT

Our contact centers have more technology available than ever before — and yet customers are only growing more dissatisfied. Why? Because as we've gotten closer to technology, we've paradoxically grown further from the very people we serve.

75% of customers want to interact with a real person more often as technology improves (PWC)

In an age where 75% of customers express their desire to interact with a real person more often, **ignoring this human connection gap in digital experiences is no longer an option.** Poor customer service is costing companies an alarming **\$75 billion per year** — and that number is on the rise.

What are leading brands doing about the need for Guided CX?

Leading Fortune 500 brands are giving their customers what they really want: a real human. From household name SaaS companies to top banks and national health providers, they understand the critical role of human connection, and know that customer experience (CX) and employee experience (EX) need to join forces.

What does that mean? It means bringing CX and EX together to create a powerful human experience (HX). Because engaged and empowered employees have a direct impact on customer experience and loyalty.

Companies that work to actively engage employees have customer loyalty rates 233% higher than those that don't (Bain & Company)

Let's zero in on a specific industry: financial services. A recent **Accenture report** found that when banking customers are using digital channels, they want the same level of personalization and engagement that they have come to expect from their local bank branch. Leading banks recognize this need, and are replicating branch-like experiences within their website and mobile app to maintain the emotional connection that customers crave.

It's a two-way street. Customers need more human support during critical moments. Employees need to be empowered to provide that support. You can't focus on CX without also focusing on EX. Investing in and prioritizing the employee experience is not only a moral imperative but a strategic one, as it directly impacts the overall quality of the customer experience.

HOW DO THEY DO THAT? GUIDED CX.

Guided CX transforms frustrating digital journeys into high-value, face-to-face interactions.

80% of leaders plan to increase customer service budgets over the next year (Zendesk)

What is Guided CX? During key moments in the customer journey, Guided CX connects customers and experts using technology like screen share, cobrowse, and video. It helps both parties quickly and effortlessly get on the same page.

When a customer can see a face and get direct guidance in a virtual space, they're more likely to feel more understood, complete a task faster, and be confident in their decisions.

And when an employee can see what the customer sees and guide them right on-screen, it helps them efficiently and effectively resolve issues. Put simply, it allows them to do their job better. It's real life, where people help people, with the best of the digital world to back it up.

Here are some real-world examples of what that looks like.

ConstructConnect sales reps give demos that convert

With Salesforce CRM and Glance for Salesforce, ConstructConnect reps launch demos from within Salesforce. Participants are connected with one click, in just seconds. All activity is automatically recorded with no action necessary by the reps, and ConstructConnect sales managers can easily access reports to give insights on demo effectiveness.

Results

- Reduced sales cycle by **60%**
- Improved lead conversion rate by **40%**
- Increased volume of demo to new leads by **66%**



Intuit TurboTax brings tax experts right to customers' screens, helping them file confidently

Intuit's SmartLook feature, powered by Glance's visual engagement technology, has provided a powerful business advantage by literally putting experts and customers on the same page — and doing so instantly.

"I spoke with a TurboTax agent. They had me share my screen ... Instantly, they could see everything in my TurboTax window and I saw my agent. I got the answer I needed faster and easier than I expected. It was so good I felt like there was a tax angel on my screen."

Results

- **Improved** Intuit's Customer Resolution Rate by **10%**
- **Increased** Transactional Net Promoter Score (tNPS) by **18%**
- **Reduced** Average Hold Time (AHT) by more than **15%**



MINDBODY provides white glove onboarding and customer care

MINDBODY agents onboard new customers by joining them on-screen, guiding them through the app. Customers are more likely to have quick success with the app for fewer future support calls, higher customer satisfaction, and lower churn.

When it comes to support, agents can instantly see exactly what the customer sees, understanding where they're stuck, scrolling and highlighting their screen, and quickly guiding them to resolution.

Results

- Measurable savings through **reduced average handle time** and customer churn
- **Higher customer satisfaction** and loyalty
- **Higher employee satisfaction**



A top 5 U.S. bank digitizes the in-branch experience

A top bank empowers their in-branch tellers and business banking teams with visual engagement tools such as cobrowse and screen share.

With one simple click of a button, banking team members are able to join customers on screen to see their browser or mobile app, and guide customer navigation. This high-touch "do it with me" approach makes complex processes like loan applications and opening new accounts frictionless. And because Glance was engineered to comply with the strictest enterprise information security and privacy requirements, customers can feel confident that their personal data is safe.

Results

- **98% of customers** reported a feeling of accomplishment
- **97% satisfaction rating**
- **1 in 4 customers** assisted with Glance
- **Increased trust** by changing "DIY" to "Do it Together"

Guided CX Applications **by Industry**

The chart below outlines even more ways top-tier brands are leveraging this technology.

INDUSTRY		EXAMPLE GUIDED CX APPLICATIONS
	FINANCE	• Digital loan applications • Digital personal banking • Digital investment management
	HEALTHCARE	• Member and provider support • Health benefits and claim reviews • Enrollment support
	P&C INSURANCE	• Online claims • Online policy management • Advisory selling • Agent/broker training and certification
	SAAS	• Digital sales meetings and demos • Customer support • Training and onboarding • Professional services

Tangible benefits of Guided CX

Guided CX offers a multitude of benefits to organizations ready to enhance their customer relationships, drive revenue growth, and differentiate themselves in a competitive landscape. Here are some key advantages of implementing Guided CX.

IMPROVED CUSTOMER SATISFACTION AND LOYALTY

Guided CX ensures efficient problem-solving, leading to higher customer satisfaction and increased loyalty. Customers are **2.4 times** more likely to stick with a brand when their problems are solved quickly.

... WHICH LEADS TO MORE PROFITS

Customer retention is directly tied to profitability. Even a modest 5% increase in customer retention can boost a company's profits by **up to 95%**. Notably, companies that prioritize CX experience an impressive **80% increase in revenue**.

HIGHER CUSTOMER VALUE

Guided CX doesn't just retain customers; it also enhances their value. Research indicates that **64% of customers** are willing to spend more if a business resolves their issues seamlessly, meeting them where they already are in their customer journey.

BETTER ADOPTION

With Guided CX, customers receive guidance and support throughout their journey, leading to higher adoption rates. By providing customers with the assistance they need at onboarding and beyond, companies can ensure that their products and services are effectively adopted and utilized.

STRONGER EMPLOYEE SATISFACTION

Companies that focus on CX have **1.5 times** as many engaged employees. When employees are empowered to provide excellent, tailored service and see the positive impact on customers, their job satisfaction increases.

REDUCED FUTURE SUPPORT CALLS

Customers and subscribers who have been onboarded with a guided Glance-enabled tour are more likely to have quick success, meaning fewer future support calls, higher satisfaction, more stickiness, and less churn.

ADDED VALUE (NEW REVENUE STREAMS)

Guided CX creates new service offerings where experts (third-party or within the organization) can offer new on-demand shopping experiences. Think styling consultations for clothing retailers, technical support for appliance retailers, and interior design help for furniture retailers.

POWERFUL DIFFERENTIATION

In today's crowded marketplace, Guided CX can be a powerful differentiator. Brands that provide superior experiences stand out from their competitors, creating memorable, personalized interactions that leave a lasting impression. It goes beyond traditional customer service and support, offering proactive guidance, real-time assistance, and a refreshing human touch in a digital world.

Still unsure? Get a free ROI analysis to see what Guided CX can do for you.

Take the first step toward unlocking the benefits of Guided CX. We'd love to provide a free ROI analysis to see precisely what Guided CX can do for your business.

Email hello@glance.cx to schedule your free ROI analysis now.