



EBOOK

Solving CX's human connection gap

A guide to supporting and enhancing your digital CX with human-to-human service.



INTRODUCTION

There's a human connection gap in digital experiences. Here's what that looks (and feels) like.

We're living in an age of hyper-normalized digital convenience. We expect everything we buy online to involve a frictionless, self-service, end-to-end journey - all taken from the comfort of our couches.

But many digital customer experiences fall far short of this expectation - especially when buying and seeking support for complex products and services.

For example, take applying for a mortgage.

First-time homeowners could be forgiven for expecting to do the whole thing online themselves. But fairly early on in the application process, they'll likely come up against complications that self-service can't solve.

True convenience here would involve customers connecting directly to a human expert who can empathetically guide them to a solution. But many banks aren't set up for that - so instead, customers are left to navigate their way through friction themselves.

And whether they have to call a contact center or visit a physical branch, the more the customer has to work to get the human help they need, the more frustrated they'll feel.

"Why do they make it so hard to talk to a human being?" (They'll think.) "Shouldn't all this inconvenience be a thing of the past? Doesn't this bank want my business?"

And so off they'll often abandon the process and find a more convenient solution with another bank or mortgage lender. Another potential customer slips through the cracks of the human connection gap.

But it doesn't have to be this way



INTRODUCTION

With the right tech, you can plug that gap. Here's what that looks (and feels) like.

Now lets replay that same scenario - but with human connection embedded into the digital mix.

A customer visits a bank's website to apply for a mortgage. But this time, when they get stuck on something tricky, they notice an option within the app offering them the option of being guided through the process by a mortgage expert.

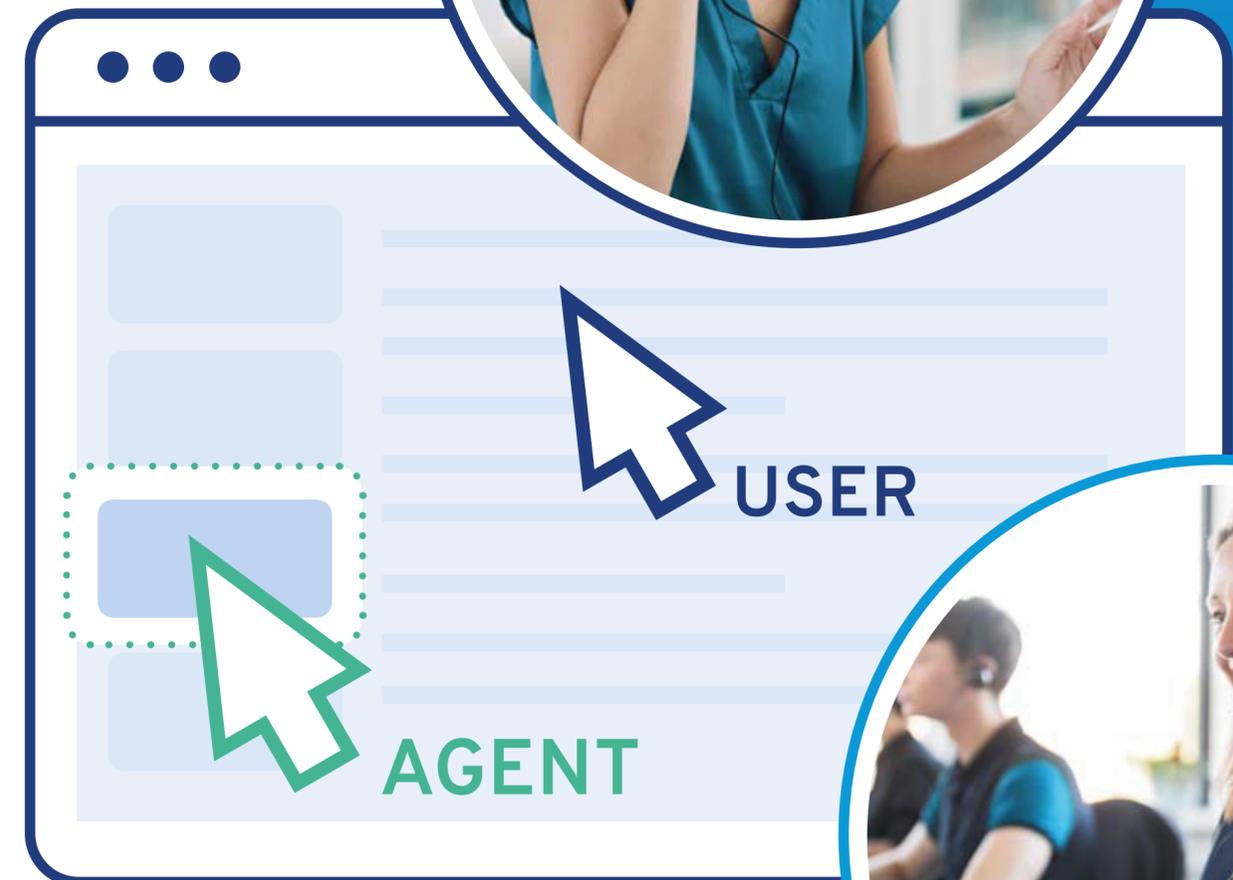
They decide to take advantage of this option and seek advice from a human advisor. With a click and a code, they connect to someone who can help them with the process without leaving the website. With the help of an advisor guiding them visually through the process, they have completed their loan and are on their way to homeownership.

Plus, they're also getting extra services online - like complimentary mortgage advice.

The emotions they're feeling in this scenario will be completely different: Relief. Gratitude. A real, human connection to the business. And primed to be a bank promoter rather than a detractor.

That's a dream outcome for any business with a focus on growing digital channels that support a complex product or service - and it's easier to pull off than you think. In fact, many businesses are already providing just that sort of experience today.

It's called a Guided Customer Experience (or Guided CX). And it changes everything.



The big picture: what Guided CX means for your customers and your business.

Chapters

1

Understand the origins and costs of the human connection gap in digital CX – and why it's critical for businesses selling and supporting complex products and services to close it.

Key takeaway:

- In any complex digital journey, there are **Critical Advisory Moments** where customers could use (and benefit from) the empathetic, sensitive subject matter expertise that only a human can provide. But most digital CX has a human connection gap.

2

Explore why Guided Customer Experiences will bridge the human connection gap by providing the human connection and expertise customers need at Critical Advisory Moments.

Key takeaways:

The ideal Guided CX should be:

- **Frictionless:** enabling both your customer and expert to get started in seconds
- **Visually clarifying:** enabling your customer and expert to see what each other needs to see (including, if preferred, each other)
- **Secure and trustworthy:** ensuring the expert doesn't see anything they shouldn't.

3

Discover some examples of Guided Customer Experiences that remove pain, frustration and friction from digital CX, by making things easier and more efficient for businesses while growing customer satisfaction and loyalty.

Key takeaways:

Guided Customer Experiences remove friction:

- By lending a helping hand during self-service processes.
- By making customer service and support super fast and effective.
- By educating platform users so that they mature faster and less intervention and support is ultimately required.

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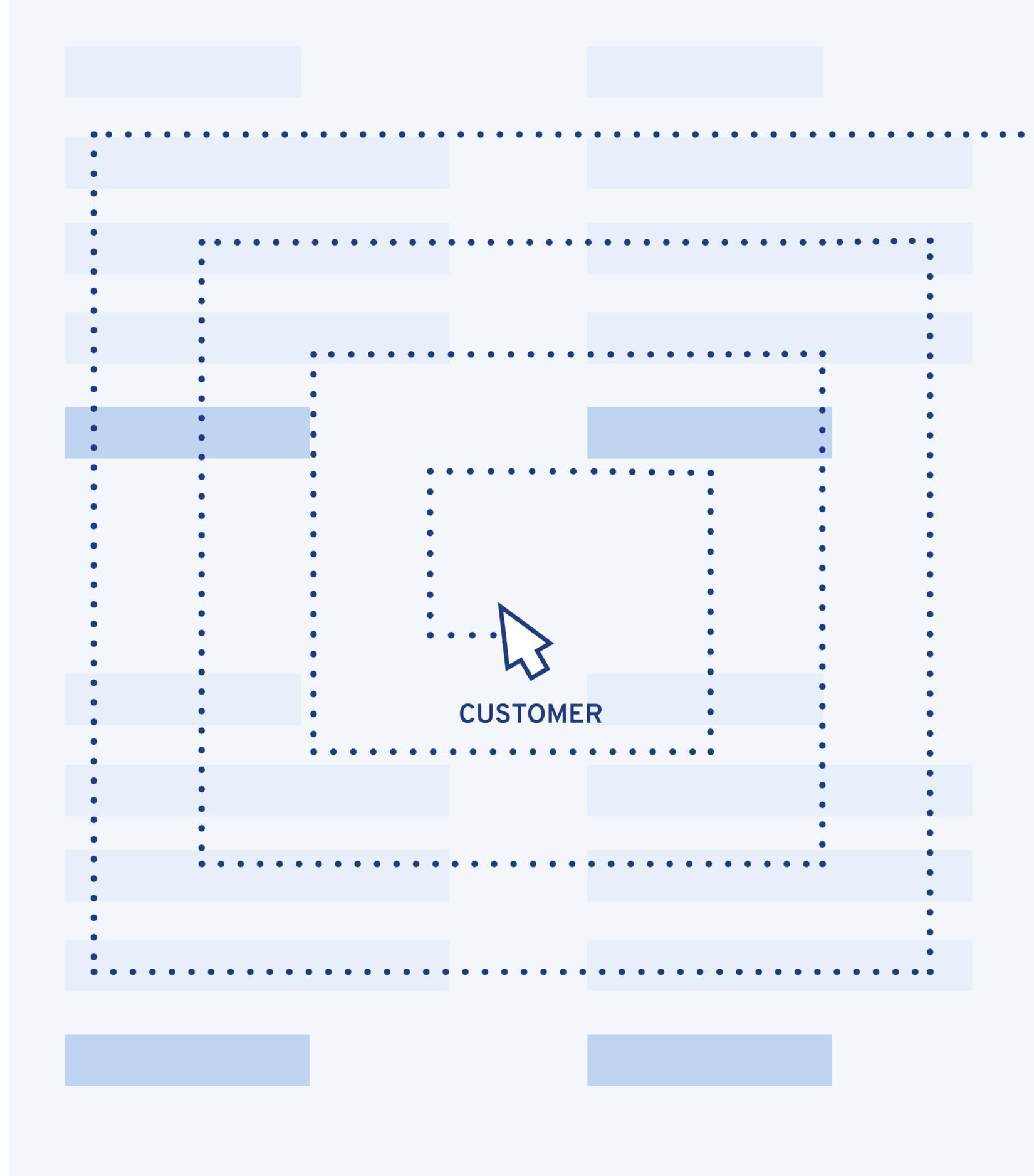
Uncover why Guided Customer Experiences don't only smooth digital CX friction; they also create exciting revenue driving opportunities – as well as forecasting some predictions about the future of Guided CX.

Key takeaways:

- Guided Customer Experiences can drive revenue by improving existing digital experiences (enabling more upselling and cross selling opportunities) and by creating new, valuable digital experiences.
- Bringing human connections into digital environments creates all sorts of exciting future opportunities for the automotive, luxury retail, and travel industries.

How CX lost its human touch

For decades, businesses have been investing in online transformation (and automation) as well as enabling as much self-service for their customers as they can.



How CX lost its human touch

Automating processes can create efficiencies and cost savings that can lead to more time dedicated to innovation. Automation also generates valuable data for use in refining and optimizing the customer journey. So the drive towards digital CX makes sense.

But when it comes to selling and supporting particular, high-touch products and services, digital CX has failed to replicate or substitute for a critical element of sales and customer service:

Human interaction.

Consumers have long felt this absence. In 2018, PWC reported that “82% of U.S. and 74% of non-U.S. consumers want more [human interaction] in the future... Today, 59% of all consumers feel companies have lost touch with the human element of customer experience.”

And since 2018, of course, digital automation of the customer experience has only accelerated. The 2020 pandemic brought things to a head, both accelerating digital transformation and (if only temporarily) removing the option of meeting customers face-to-face.

With more and more customers going online to buy and get support for products and services, both businesses that used to provide in-person service to support customers and digital-native businesses that never provided that in the first place now have to reckon with a human connection gap in their digital CX.



Why (and where) the human connection gap matters

Simple purchases and services can be supported through self-service and automation. But the universe of digitally transformed purchasing and service experiences is growing – in size and complexity.

Some purchases and services are expensive and emotional.

They **involve complex processes** with many steps, and the customer may get stalled or lost along the way.

Or they might **require consultation from an empathetic subject matter expert** so the customer can choose the option that best fits their needs.

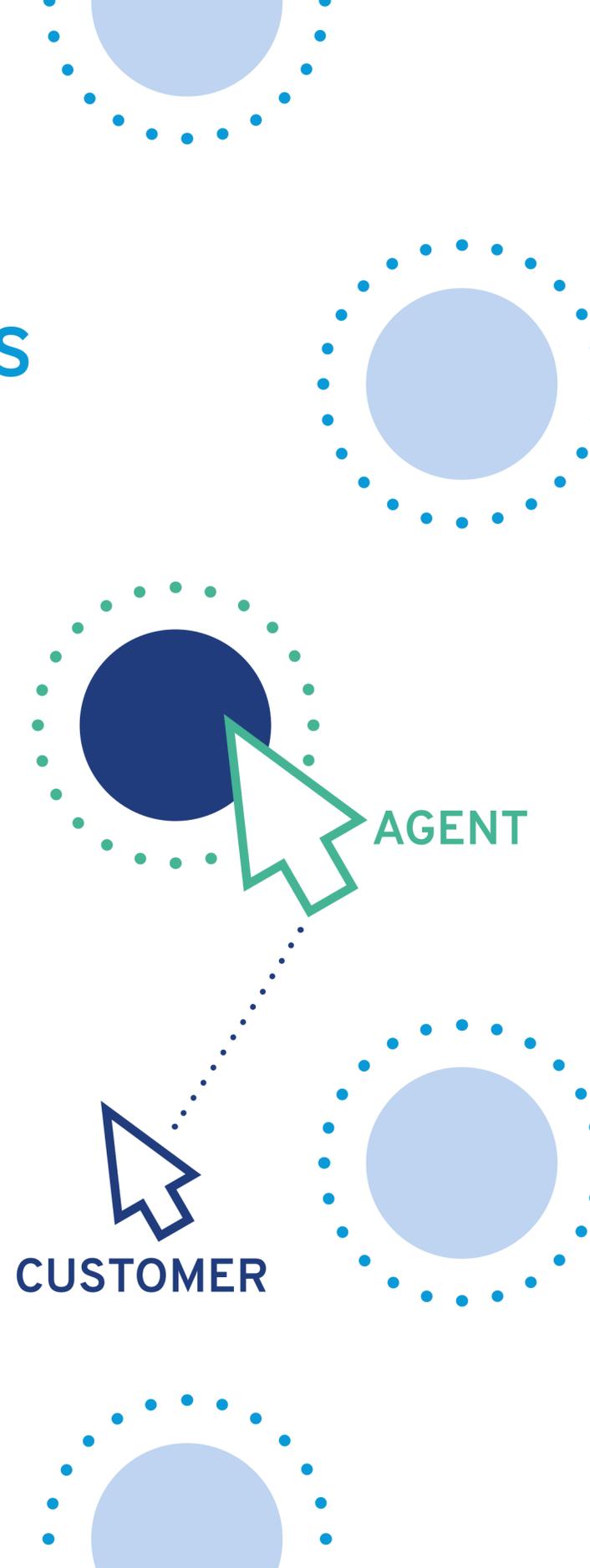
There are **Critical Advisory Moments** in the purchase and support cycle for complex products and services. These moments require (or benefit from) high touch, empathetic and strategic interactions with a subject matter expert.

Critical advisory moments are relatively easy to facilitate when you can meet the customer in-person – in branches, stores, or during home visits. But automated digital technology (which handles low-touch engagements with incomparable efficiency) isn't built to serve them.

For example, bots can answer the question, "What options are available to me?" But only human experts can make recommendations on which option is right for you.

And bots won't be replacing humans in this regard for the foreseeable future. A McKinsey study suggests activities involving "the application of expertise to decision making, planning, or creative work" are among the least automatable.

Whether you're a brick-and-mortar business digitally replicating a traditional in-person experience, or a digital-native company looking to enrich your digital services with face-to-face interactions, there's a new **human connection imperative for CX**.



What is a Critical Advisory Moment?

Critical Advisory Moments are forks in the customer journey – where one path advances the process and the other terminates it (and often starts a new journey with your competitors).

Customers are confused, frustrated, and paralyzed by uncertainty. An automated assistant can't help them – your customers need a human connection with an expert.

And crucially, how you provide that advice is also critical.

That's because Critical Advisory Moments are intensely vulnerable to disruption. Customer patience might be wobbling on a knife edge. You do not want to make your customer work harder at this point – even asking them to open an email and click a link to get in touch could be the last straw.

But if you provide the right kind of guidance at Critical Advisory Moments, you'll hit the jackpot for customer satisfaction and conversion speed.

Check Critical Advisory Moment in action.

Introducing the Guided Customer Experience

The human connection gap in CX is felt on both sides – by customers and the businesses serving them in any number of unguided customer experiences.



CUSTOMER



AGENT

Introducing the Guided Customer Experience

When purchases and support services are high-touch and customers reach Critical Advisory Moments, unguided experiences are:

- **Isolating:** there's no way to speak to a human expert without significant effort.
- **Disruptive:** you have to pause (or stop) what you're doing to get in touch with the expert
- **Impersonal:** once you've managed to get in touch with an expert, communication is suboptimal (you can't even see their face).
- **Obscure:** not only can you and the expert not see each other, but you can't even share what you're seeing with each other.



Customers need something more curated, managed, interactive, user-friendly, collaborative and empathetic.

They need a **Guided Customer Experience** that provides the human connections they're asking for in the digital space. An experience designed for those Critical Advisory Moments in the customer journey where only human expertise can help.

An experience that gives your customers a better experience and your agents and advisors a powerful tool for continuing (or starting) to make the most of their in-person talent for satisfying customers and close sales in the digital space.

An experience that doesn't disrupt those highly sensitive Digital Advisory Moments by making the customer work harder to be helped when they need and expect things to be made easier.

So, what does that sort of Guided Customer Experience actually look like? We hinted at that in the introduction, but here's a more detailed picture of what it should look like.



A Guided Customer Experience provides the human connections that customers are asking for in the digital space.



In an ideal Guided Customer Experience...



Your customer can get started in seconds, with just a few clicks.

A Guided Customer Experience should remove friction, not increase it. It shouldn't require the customer to open an email or download some software. They shouldn't have to leave your website or app to get help. And they shouldn't have to wait more than a few seconds.

(And your agents can start guiding them, too.)

Your agents shouldn't have to leave their environment to get started, either. The Guided Customer Experience should be embedded in their environment so that it fits frictionlessly into their workflow – and so each Guided CX session can be both informed by and contribute to your CRM.

Your agent can see what your customer sees (and visa versa).

The customer can share their screen with your agent, so your agent doesn't have to guess what your customer's looking at. This establishes a mutual understanding and ensures issues get resolved faster.

If need be (if seeking help with a physical product, for example), the customer can share what they're seeing in the physical world through their smartphone camera.

Plus, your agents can share their screens with the customer. Salespeople can share presentations and demos to help close sales. Service agents can demonstrate to customers how to perform complex processes and troubleshoot.

Furthermore, your agents can guide your user's navigation, highlighting page content and navigation options, and scrolling the page to guide the customer.

Your customer can trust that it's a secure experience.

Needless to say, it's vital that this is a secure Guided Customer experience, so the customer feels at ease. Again, this is about increasing trust.

Not having to leave your website or app or click on a potentially suspicious hyperlink helps here, of course. But the customer should also be able to be reassured that any sensitive, personally identifiable customer information in the shared view will be automatically masked (redacted) so the agent can't see anything they shouldn't.

Your customer can see your agent (and—if they like—the agent can see them).

Nonverbal communication is incredibly important, and face-to-face customer service is powerful. It's also one of the biggest elements of in-person experience that's sorely missing from digital channels.

Thanks to popular web-conferencing software, more of us than ever are now used to conducting conversations through our laptop, mobile and tablet screens. The Guided Customer Experience brings it into online interactions.

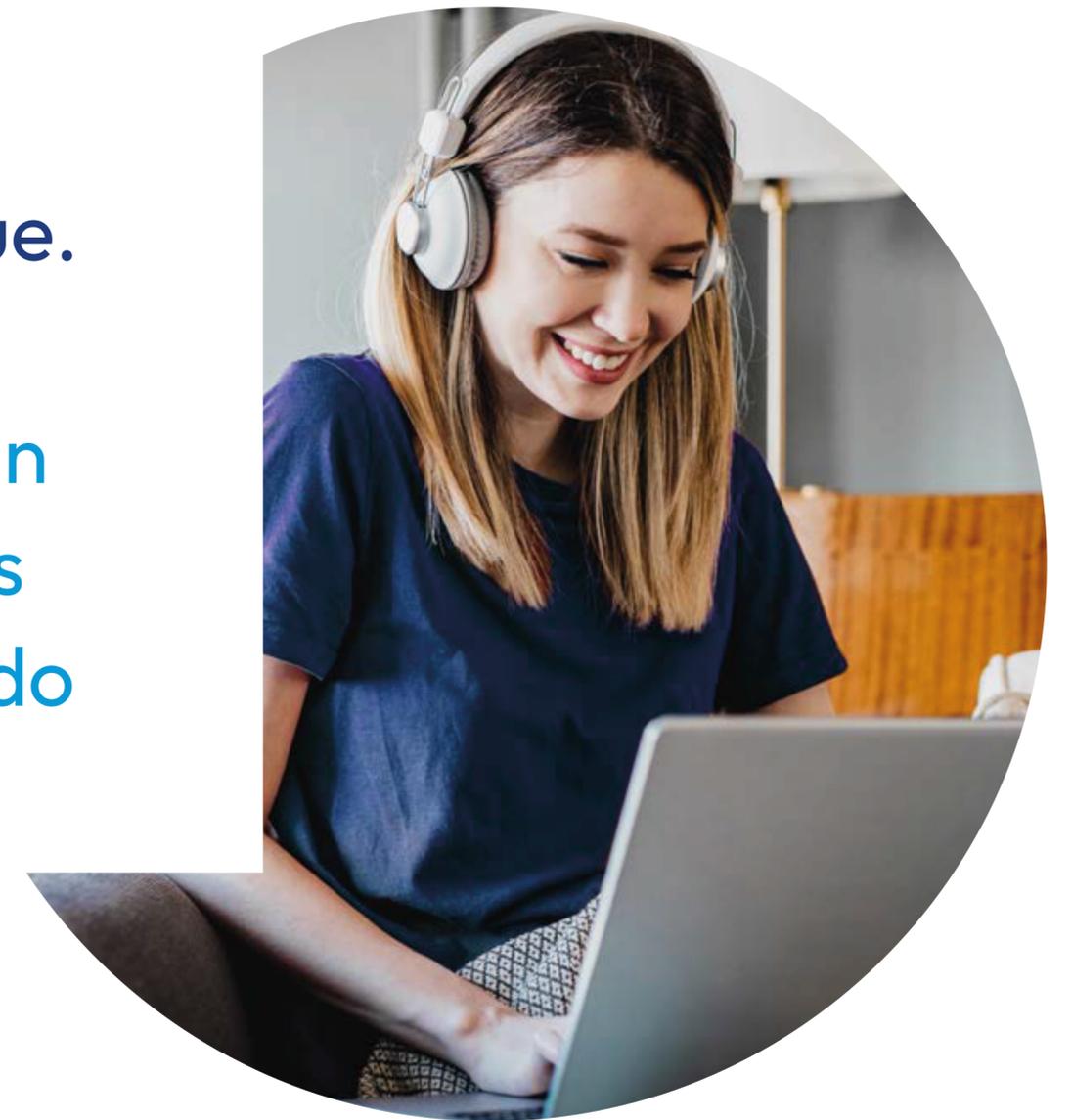
A guided experience should allow customers to see your agents face on their screen with a real-time video feed, and (if your customer wants to) your agents to see your customers' faces, too.

See how this works in action, [request a live demo now.](#)

[Book a demo](#)

The Guided Customer Experience bridges the human connection gap for businesses selling and supporting complex products and services. And not only does it remove pain, frustration and friction from digital CX – it also opens up new possibilities for generating revenue.

Let's take a look at what Guided Experiences look like in the real world – how they're already helping businesses and customers today, and what they might be able to do in the near future.



Guided CX removes friction from the digital experience

Guided CX enhances digital experiences, making complex purchases and processes easier and drives customer satisfaction and loyalty. Because Glance Guided CX is designed specifically for Critical Advisory Moments, it intervenes in customer experiences without disrupting them.



Guided CX lends a helping hand to self-service

Guided CX isn't about replacing self-service. In many cases, customers still want to be able to self-serve as much as possible.

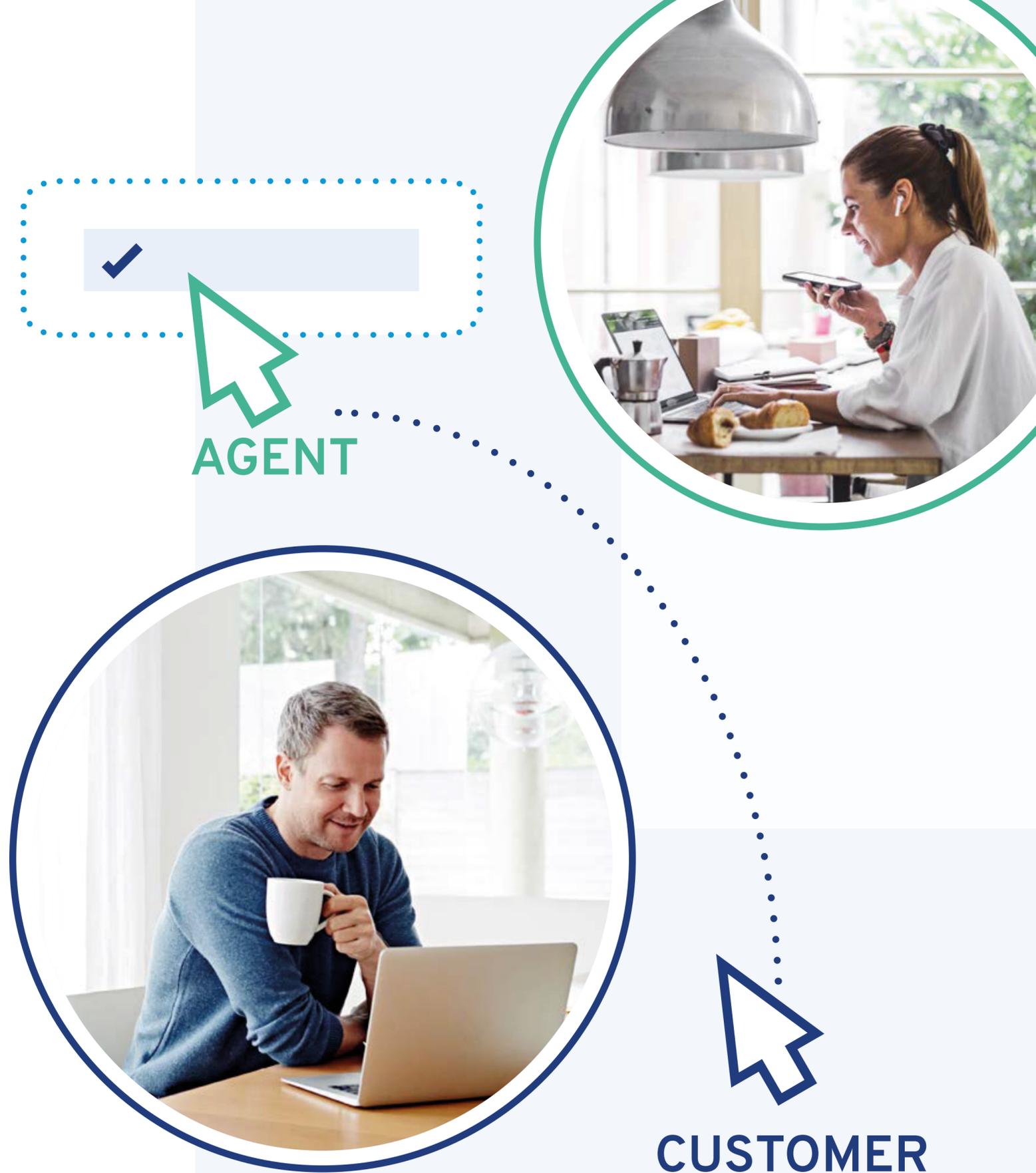
But when they reach those Critical Advisory Moments in those self-service journeys where a human connection is required to guide them through, Glance Guided CX enables businesses to reach out – and smooth the path to purchase.

Take the financial software specialists Intuit. Operating in a tax preparation software market that's crowded with low-cost competitors, Intuit wanted to deliver a premium service to help their customers do their taxes and achieve maximum allowable tax refund.

By deploying Glance within their website and app, Intuit has enabled customers to ask the company's tax experts questions as they fill in their tax returns (without having to download or install anything). Giving customers this option has helped Intuit see a 10% increase in their case resolution rate and an 18% increase in Transactional Net Promoter Score (tNPS).

Find out more how we helped Intuit. Check out the case study now.

[Get the case study](#)



Guided CX makes customer support super effective

When customers actively reach out for help – by calling your contact center, for example – a common point of friction results from a lack of shared visibility.

Your support agent can't easily see the problem your customer is seeing. And they can't easily show your customer the fast-track to solving the problem (or other material it would be valuable for the customer to see at this stage).

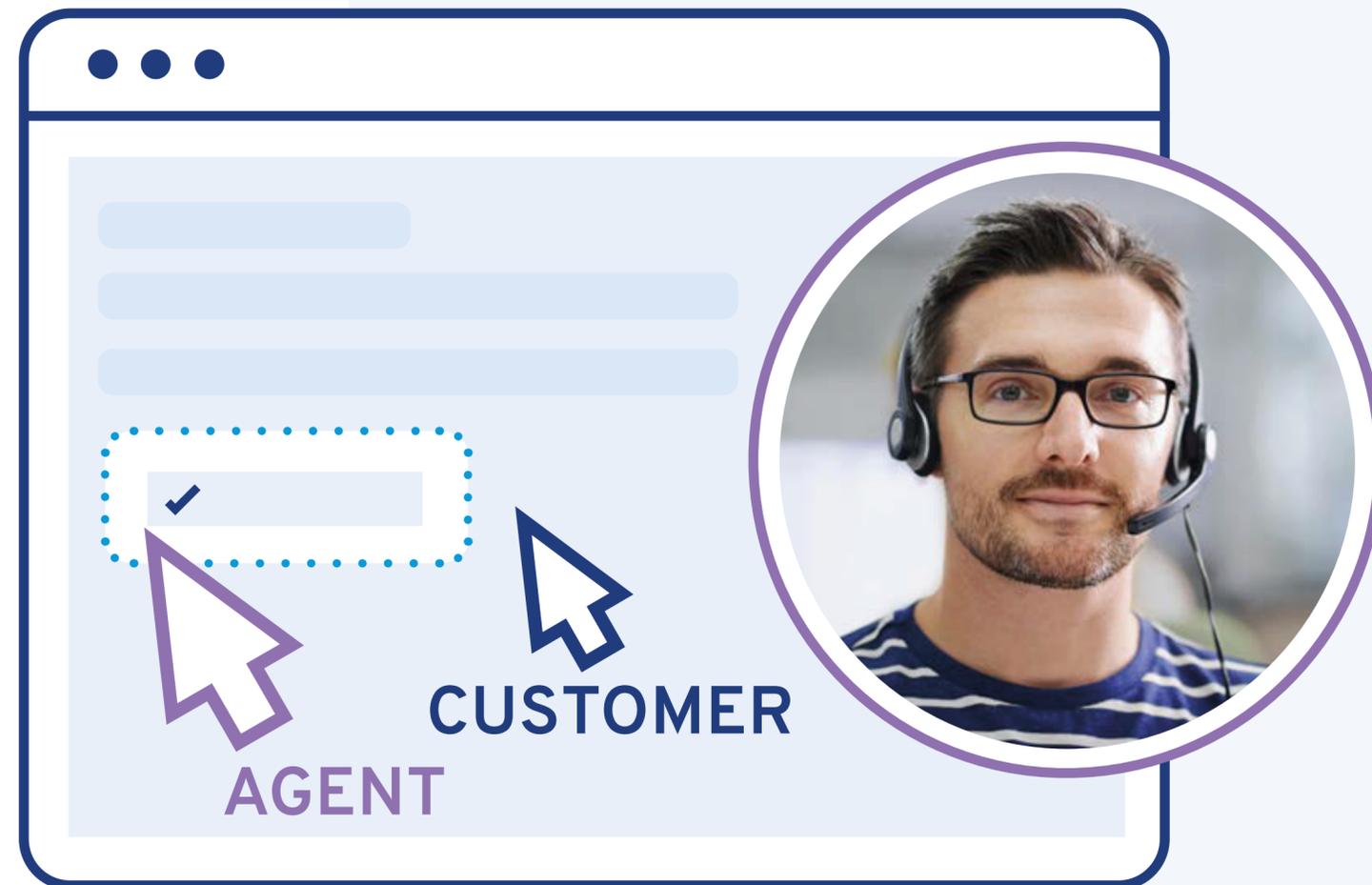
Our customer Constant Contact, an SMB online marketing solutions provider eager to ensure that interacting with an interaction with their contact center is an impressive experience, have overcome this friction with the help of Glance Guided CX sharing sessions.

Constant Contact's agents can now easily see customers' browser views screens (with sensitive information pre-masked) and instantly identify and understand customer problems. In many instances, they can show customers (by highlighting page elements) how to solve their issues – or even (with the customer's permission) take over and resolve things themselves..

Glance has accelerated and improved Constant Contact's customer support, driving an uptick in both First Call Resolution and Customer Satisfaction scores.

Check out [the case study now](#)

Get the case study



Guided CX rapidly transforms platform users to platform experts

Along with improving your self-service and customer support processes, Guided CX can be used to educate platform users so that, in the long run, less intervention and support from the business is required.

Digital platform owners realise more value from mature 'power users' who know their way around the platform. You can let users train themselves, of course, but this can take time – and there's potential for users to opt out when they hit snags.

Glance Guided CX is helping MINDBODY (whose business management software serves gyms, spas and salons worldwide, helping customers find and book with them) and Truckstop.com (a SaaS-based digital-freight marketplace) to onboard subscribers and customers with guided tours, facilitating and accelerating the maturation of platform users.

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

Read more about our work with MINDBODY [here](#). And to read our Truckstop.com case study [here](#).

But Guided CX isn't just about removing friction from digital engagements. By uniting the best of digital and face to face it actually unlocks new value and services – as we'll see in Chapter 4.



Guided CX adds new value and creates new experiences

When businesses begin to provide Guided Customer Experiences with Glance, it isn't long before they spot opportunities for driving revenue by capitalizing on the Guided Customer Experience effect and by creating new and valuable digital experiences.



Here's a few examples of that happening:



Intuit used Glance to launch a lucrative new remote consultation service.

Once they realised how powerful a Guided Customer Experience could be, Intuit realised they could use Glance to do more than just support the self-service process.

So they launched a whole new consultative process (TurboTax Live Full Service) for customers willing to pay a premium to have Intuit's experts do their taxes for them. Intuit's agents now hold consultative interviews with customers to gain an understanding of their exact situation – before filling in the customer's tax returns for them.



Constant Contact transformed their Service Center into a Revenue Center with the CSAT generated by Glance.

Constant Contact saw that the big boost in CSAT driven by Glance represented an opportunity to cross-sell and up-sell related products to happy customers.

Their agent KPIs now include recommending up-sell options, acceptance rate and revenue contribution.

Check out the full Constant Contact case study to find out more about how we helped turn their Service Centre into a Revenue Centre

[Read the case study now](#)

The future of the Guided Customer Experience

The possibilities opened up by bringing human connections and in-person experiences into the digital environment are endless. Who knows what comes next? We have a few ideas...

In-branch and in-store Guided Customer Experiences

While the Guided CX can give customers an alternative to visiting the brick-and-mortar business, if visiting the brick-and-mortar is essential (or preferred), Guided CX can still play a role in enhancing that visit. Need to talk to an assistant, for example? If there are Guided CX booths in-branch or in-store, there'll be no need to queue up at the counter.

In-car Guided Customer Experiences

With high-quality and robust screens increasingly a fixture in dashboards, Guided CXs could get out on the road, enabling specialists to join customers in-car to help them set up, configure and operate the evolving computer interfaces that are starting to replace analog dials and buttons.

Luxury brand experiences delivered to your desktop

Go shopping for expensive items in a curated brand environment that makes you feel like you're getting the A-list treatment.

Guided tours for prospective tourists

Pick the perfect resort or hotel (or room) to stay on your vacation – and get a sneak preview of all the amenities before you've so much as ordered a bottle of sunscreen.

Conclusion

The Guided Customer Experience is the solution to the human connection gap in CX. (And has the potential to be so much more.)

While businesses have invested heavily in automated digital self-service, businesses have neglected to make up for a steadily increasing human connection gap in their digital CX. COVID-19 didn't create this gap, but it has exacerbated it and brought it into focus.

Currently, many businesses which sell and support complex products and services are failing to make complex online purchases and processes less complex for their customers. (And their customers aren't happy about it.)

Thankfully, there's a new discipline emerging which promises to remove the pain, friction and frustration from these complex purchases and processes: the Guided Customer Experience.

The Guided Customer Experience brings together the best of in-person and digital service to deliver

a superior digital customer experience and is now unlocking new potential revenue streams for those that adopt Guided CX technology.

Those who master Guided Customer Experiences will be the winners in an increasingly digitally transformed world. And so will their customers.

Who we are

Glance enables seamless, secure Guided Customer Experiences at the touch of a button. It's a cloud-based digital advisory layer that sits on top of your CRM, enabling your people to join your customers in a secure consultative session in a matter of seconds.

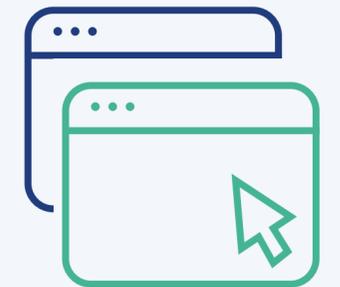
With Glance's [suite of visual engagement technologies](#), your best people can be there for your best customers when they really need them.



VIDEO



COBROWSE



SCREENSHARE



MOBILE APP SHARE

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.



GUIDED CUSTOMER EXPERIENCE

WATCH THE VIDEO



Request a live demo to see the many ways Glance can transform your customer experience.

BOOK A DEMO



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