

EBOOK

Personal Meets Digital: **Guided** Experiences for SaaS

How meeting your customers at critical moments can improve results across your whole organization.



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Cloud-based applications, or software as a service (SaaS), are thriving as companies in virtually every sector have greater technology needs and more remote employees. Company spending in SaaS has continued to rise since 2020, making the future look bright for the industry.

This also means that competition is fierce. Companies often have an overwhelming number of software options, with new suitors courting them regularly. But many SaaS solutions are overlooking a critical way to stand apart from the technology-driven crowd: people. One-on-one, human interactions — connected by technology. Guided customer experiences (Guided CX) like cobrowse,

video, and screen sharing technologies bring human connection to customers and prospects when they need it most.

In this guide, you'll learn how your SaaS company can leverage the power of Guided CX to improve three key areas of your business: customer experience (and customer support), sales, and services.

Company spending in SaaS has continued to rise since 2020



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

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Customer Experience

4 areas to focus on to improve SaaS customer support

Key topics:

- Context
- Assistance
- Education
- Centralization

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Sales

Making visual engagement more effective for SaaS sales teams

Key topics:

- Make it effortless
- Remove the “I don’t get it” factor
- Study how to integrate cues into conversations
- You’re in sales – be branded
- Quantify your sales impact
- Bottom line for SaaS sales teams

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Service

Being a better SaaS partner to improve customer satisfaction

Key topics:

- Improving onboarding through better guidance
- Reducing cancellations by checking usage
- Understanding customers’ needs to identify opportunities

Customer Experience

In a SaaS company, providing great support is the key to your growth and success.



Four areas companies can take advantage of to take SaaS customer support from average to outstanding

1. Context

Knowing your customers and their context allows you to more fully understand their needs. Grasping customer context – a set of known factors that enable you to fully understand a situation or need – early on will provide you with a definite advantage.

Context can be composed of several factors, notably the who, where, why, what, and how. You can empower your SaaS customer support team to understand context in a few ways:

- Creating user personas for your customer support team to study and understand
- Recreating each persona's experience by exploring their steps and the environment they're in
- Using cobrowse and screen-sharing tools to see where users are getting stuck

2. Assistance

There are three main reasons for a client to contact a SaaS customer support team member with an issue:

- Bugs
- Missing features
- Confusing features

These three points represent more of an opportunity than a problem. For instance, there's the opportunity to discover a glitch. There's also the opportunity to impress the customer by solving the issue.

Take, for instance, the example of a bug. Every bug found gives your IT team the opportunity to solve the issue and ensure that no other customers experience that problem.

In the example of a missing feature, depending on how many people request the feature, you can get new ideas for how the product can be developed.

Ultimately, this will result in more than one happy customer. Regarding confusing features, hearing from customers provides you with the opportunity to improve communication and make product expectations clear.

3. Education

SaaS customer support teams should be available to educate customers. Educate them about new features, how to use the current solution to its maximum potential, and how to grow usage of the solution within their company.

You can supplement live contact with blog posts, emails, webinars, and/or videos. All of these combined will help your customers get the most out of your product.

4. Centralization

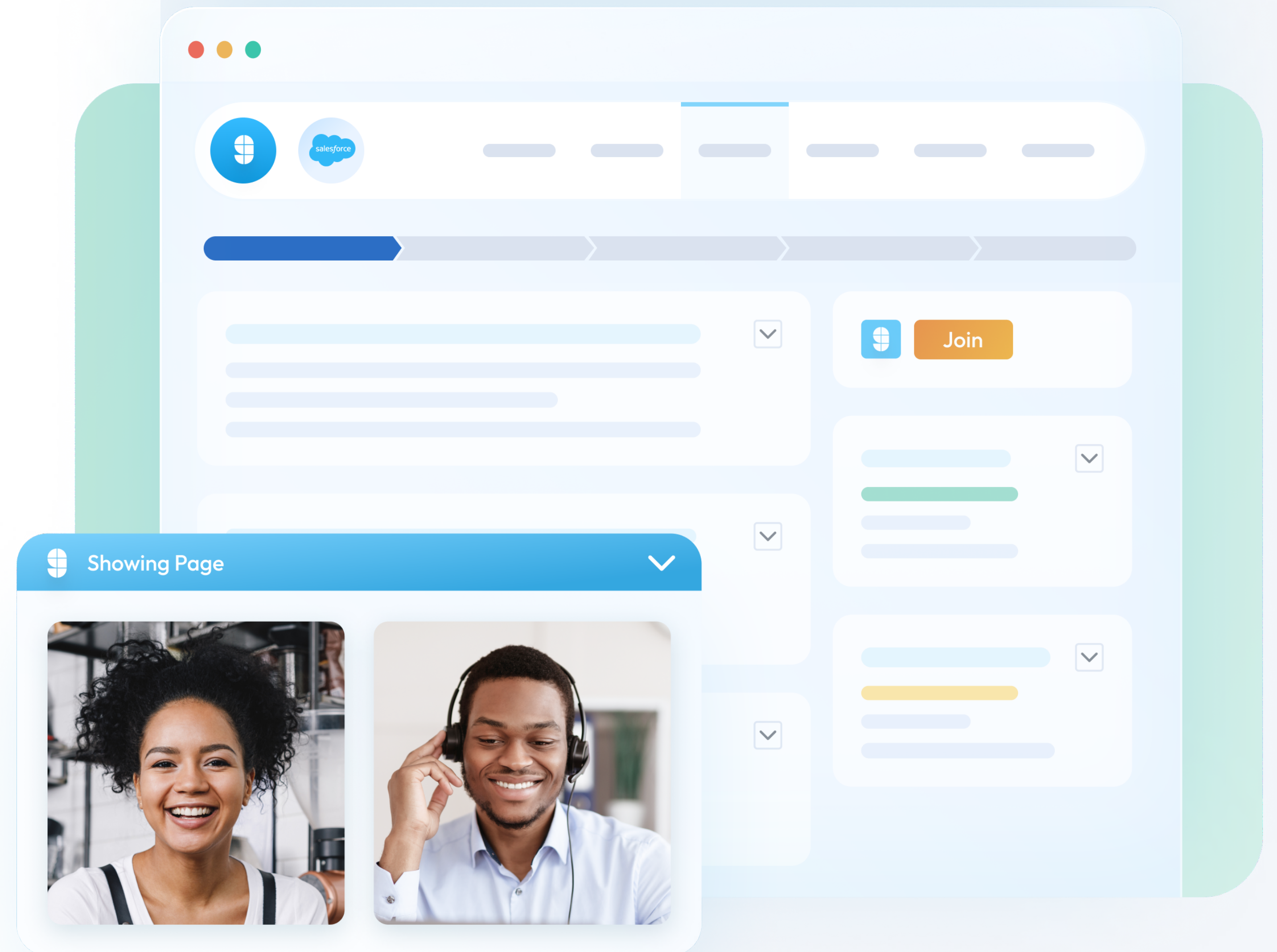
Lastly, it's important that customers understand that their questions will be handled by your customer support team, regardless of the means of contact.

In other words, SaaS companies have social networks, websites with live engagement options, use emails, and more. Ideally, you should centralize all communications from customers so that your SaaS customer support team can answer questions in the shortest possible time using the customer's preferred channel. Tools such as Intercom allow you to concentrate communication in one place.

Outstanding SaaS customer support is key to running a successful business. While companies choose solutions partially based around features, studies have shown that many will pay more to have great customer service. Great customer support will increase revenue, customer loyalty, and your business reputation, making it vital to any SaaS company.

Sales

In today's online world, a visually underpowered sales interaction has a 50-50 chance of failing to adequately engage its audience. Even worse, it can lead sales teams to miscommunicate or encourage prospects to focus on more easily consumable alternative messages.



Making visual engagement more effective for SaaS sales teams

Sixty-one percent of buyers say they can get as much value from meeting suppliers over video conference as they can from in-person visits. (McKinsey, 2022)

Even in a digital world, it's critical to beat your competitors' ability to visually engage with the same prospects you're courting. You must help prospects discover the products and services they need, demonstrate those solutions in a compelling way, and upsell advanced capabilities with further benefits. In order to accomplish all that, your SaaS sales teams must become experts at exploiting visual engagement as a sales tool.

Here's how to build their technique:

- Explain to your sales teams that truly personalized visual engagements produce outstanding, effortless sales experiences.
- Have your sales teams use visual engagement solutions to transform the selling process into a more naturally collaborative, cooperative, and stimulating relationship.
- Understand that your ability to produce amazing customer experiences creates a significant competitive advantage and will help you close more deals faster.

65% of people are visual learners



Services

Services like implementation/onboarding and account management can reap great benefits from using visual engagement technology. Here are some examples.



Being a better SaaS partner to improve customer satisfaction

Improving onboarding through better guidance

During the onboarding process, you'll need to be there for your customers, often walking them through all the steps from signup to activation to training, in order to decrease the drop off rate.

Glance visual engagement solutions can help in supporting clients through cobrowse, screen sharing, and agent video. With Glance solutions, SaaS customer support employees can see exactly where customers are and what they're doing. Guiding customers through onboarding processes provides an opportunity to enable customers to learn how to handle processes for themselves from the get-go, reducing future support calls and increasing customer empowerment.

Reducing cancellations by checking usage

It's important to check if a customer is using the software. A 2012 study by Totango found a "near-perfect correlation between non-use and cancellations: cancellations of software subscriptions were almost always preceded by a period of non-use." For this reason, it's fundamental to discover why the customer isn't using the product.

Account managers should contact SaaS customers that aren't using the product to find out why usage is dropping off. When talking with customers that appear to be breaking away, make them an offer that encourages them to give you a second chance. This will give you the opportunity to understand the source problem and to find a solution.

Understanding customers' needs to identify opportunities

It's essential to understand how and why a customer is using your SaaS product so you can help them make the most of your solution. This means really taking the time to walk in their shoes, understand their day-to-day tasks and needs, and empathize with their challenges. (Actually seeing them use the software through cobrowsing can help!)

Through this lens of empathy and understanding, you can then identify opportunities. Perhaps there are add-ons that could benefit the customer. Or there's a feature they aren't taking advantage of that would help them. Or perhaps you see an idea for a new feature that could help them and other customers like them.

To meet customers' needs, we first have to dig deep to really understand them.



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.



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