

EBOOK

The Human Edge in AI Customer Service

The human-in-the-loop case for visual engagement in an AI-first support stack



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AI needs a better partner

According to Zendesk CEO [Tom Eggemeier](#) we are advancing toward a world where 100% of customer interactions involve AI in some form. But AI isn't the finish line. It's the starting point.

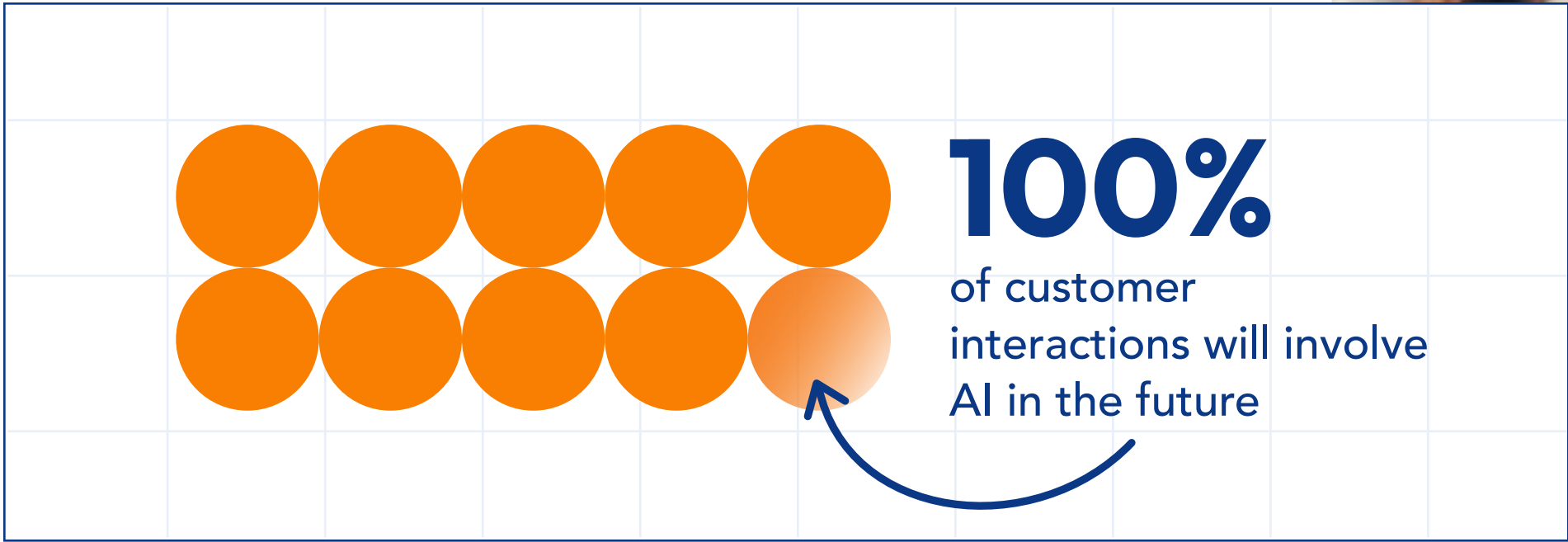
Even the most sophisticated AI eventually reaches moments where human expertise matters more than automation. A billing issue becomes unusually complicated. A customer needs reassurance before making an important purchase. A healthcare patient has questions that require both empathy and information. A financial services customer encounters an exception that falls outside of standard workflows.

These are the situations where people create the most value.

The organizations delivering the best customer experiences understand the strengths of both AI and human agents. They don't think about them as competing approaches; instead, they design customer journeys where each plays to its strengths.

The next generation of customer support is about using AI strategically and giving human agents everything they need to solve problems immediately when they step in. AI handles routine work, humans handle complexity, and in-the-moment visual engagement bridges the two.

Together, they create a support experience that's faster, more efficient, and significantly more human.



AI doesn't replace humans, it elevates them

Much of the conversation around AI focuses on replacement: will AI replace agents?

And while [Forrester](#) predicts that by 2030, AI will cause 49% of current customer service jobs to disappear, the transition is more nuanced. The organizations seeing the greatest success with AI aren't replacing people, they're elevating the human role so they spend more time where they create the most value.

AI excels at repeatable work

Modern AI is remarkably good at handling predictable interactions like resetting passwords and answering frequent questions. Automating these customer tasks reduces costs while giving customers immediate answers to straightforward questions.

According to the latest [CX Trends research](#), AI adoption continues to accelerate as organizations look for ways to improve efficiency while meeting rising customer expectations for speed and availability.

This is exactly where AI shines.

The highest-value conversations still need people

Customer journeys can be unpredictable. Some issues involve multiple systems. Others require judgment, creativity, reassurance or interpretation: nuances that are hard to train AI agents to understand and respond to appropriately.

In these interactions, context matters. Agents need to adapt to situations that don't follow a script. And they need to do it all with empathy.

AI can support these interactions, but human expertise remains essential.



When humans are still needed:

- A patient completing healthcare registration encounters conflicting insurance information.
- A banking customer notices a pattern of unexpected account activity.
- A software administrator struggles with a complex implementation.
- An insurance policyholder needs help filling out forms to make a claim.

Human expertise becomes even more valuable

Ironically, successful AI adoption often makes human agents more important, not less.

As automation handles routine requests, the conversations reaching live agents become increasingly complex. Support professionals spend less time resetting passwords and more time solving problems that require critical thinking.

That changes the role of customer support. Instead of acting as information providers, agents become trusted advisors. Instead of reading scripts, they diagnose problems. And instead of navigating routine transactions, they build confidence during high-stakes moments.

Organizations should empower these experts with technology that helps them resolve issues faster, not ask them to work around incomplete information.

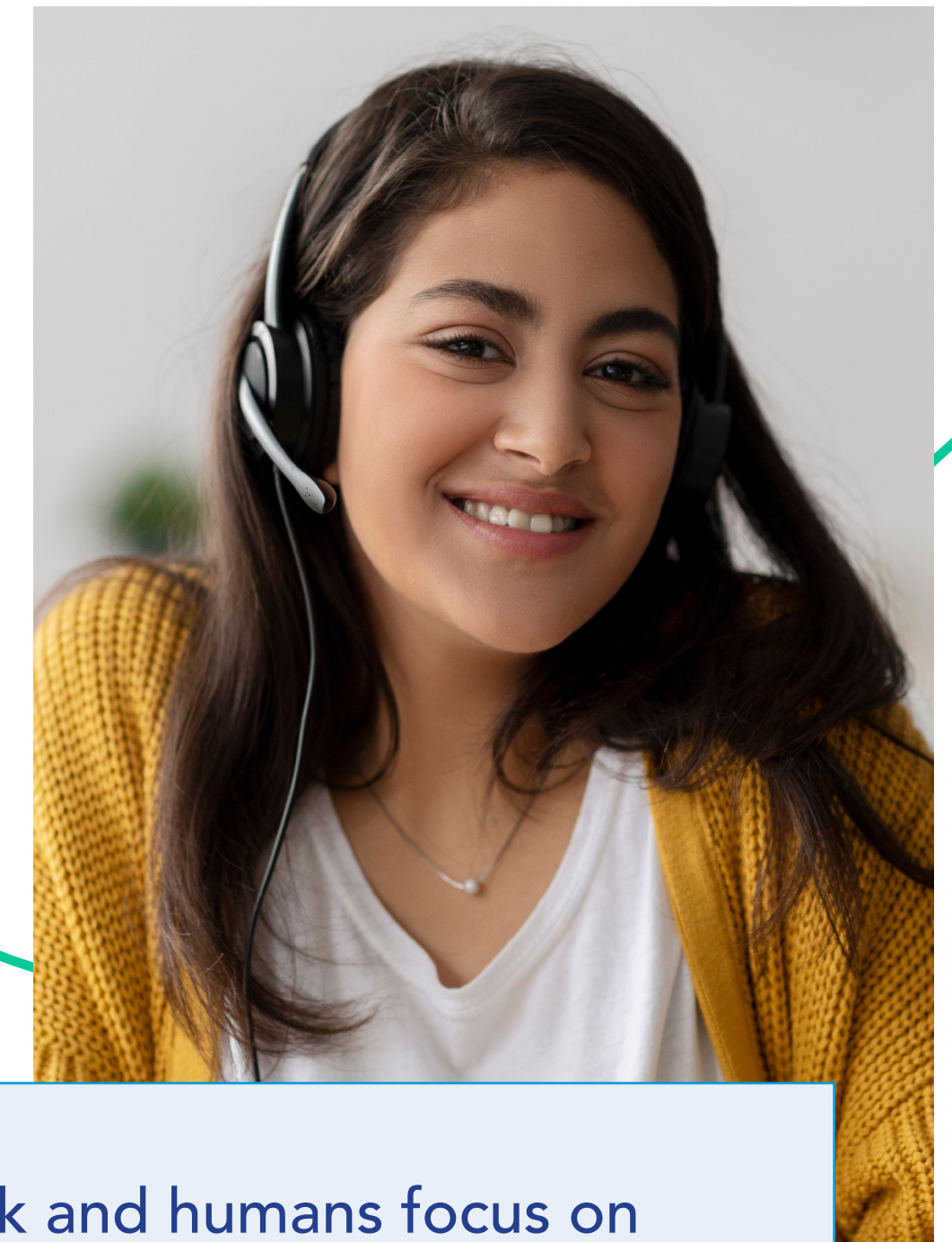
Building support around resolution, not deflection

CX leaders measure AI differently than they did just a few years ago.

Instead of celebrating how many conversations never reach an agent, they're asking better questions:

- Did the customer solve their problem?
- Was the experience easy?
- Did the transition between AI and human support feel seamless?
- Did the customer feel understood?
- Was the issue resolved on the first interaction?
- Did we identify additional revenue opportunities?

Those metrics focus on outcomes rather than automation alone. That's where human-in-the-loop support becomes a competitive advantage.



When AI handles routine work and humans focus on meaningful conversations, every customer interaction benefits from the strengths of both.

The broken handoff problem

For all the progress AI has made, the handoff to a human agent continues to frustrate consumers.

In the [Glance 2026 Customer Experience Trends Report](#), respondents repeatedly mentioned frustrations with AI when it was difficult to reach or transition to a human:

- “Most of the time you can’t get away from the AI circle of help.”
- “When I ask the AI for a human representative, I want a human representative.”
- “Give us easy connection to human support rather than making us wrestle with the AI.”
- “Seems like they always put you into an endless loop to where you can’t get the help you need.”

When switching channels, our research found that:

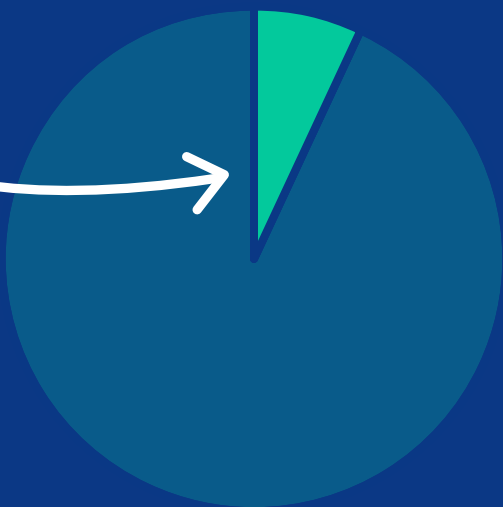


44%

almost always have to repeat themselves when switching channels

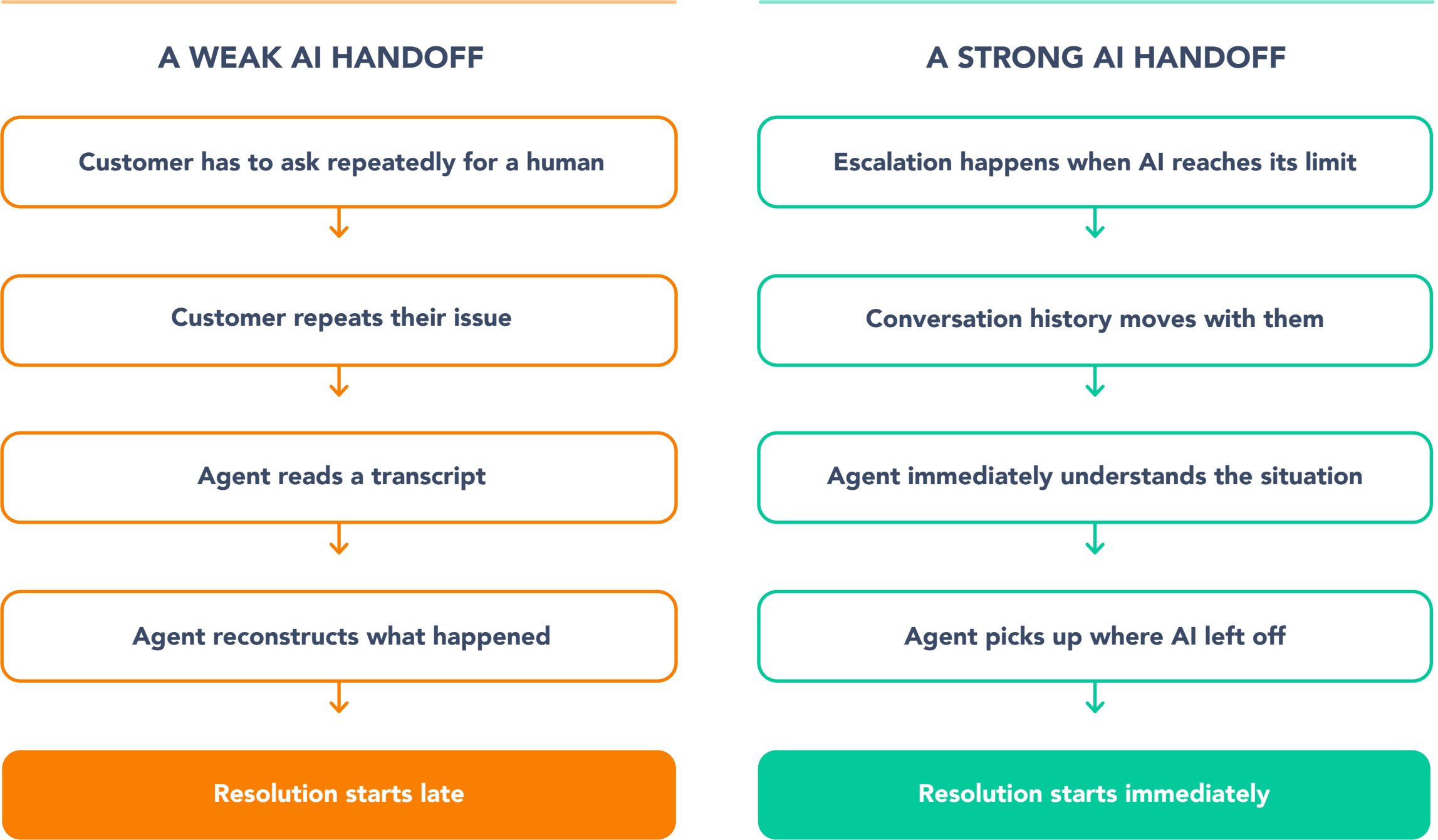
7%

rarely or never have to repeat themselves



Every repeated question adds friction

Every unnecessary explanation increases customer effort. By the time an agent begins troubleshooting, the customer may already be frustrated before any real problem-solving has begun.



AI vs. Humans

A seamless handoff isn't just about transferring a conversation. It's about transferring context.

The goal is simple: when AI reaches the end of what it can do, the human agent shouldn't have to start over. They should be able to continue the conversation with the full picture already in front of them.

Where AI excels

- Detecting intent
- Summarizing history
- Predicting needs
- Routing conversations
- Finding information

Where humans excel

- Building trust
- Explaining complex decisions
- Showing empathy
- Reassuring customers
- Solving unique situations

A better escalation path

Think about the traditional customer journey. A customer starts with a chatbot. The chatbot can't resolve the issue, so the customer calls support. They explain everything again. Then, the agent asks clarifying questions. Eventually, the issue gets resolved.

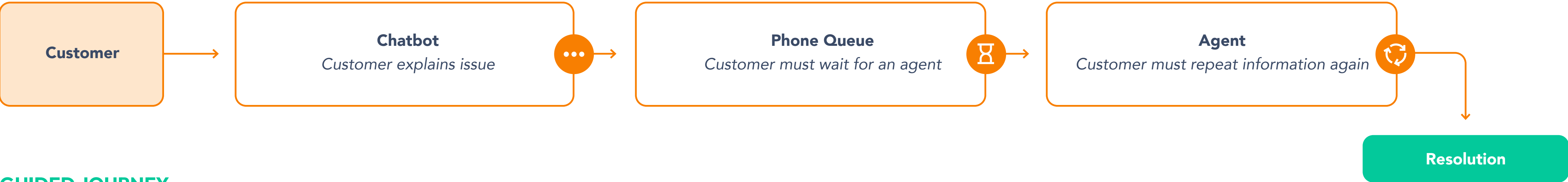
It's a familiar process. It's also unnecessarily difficult.

Now imagine a different journey.

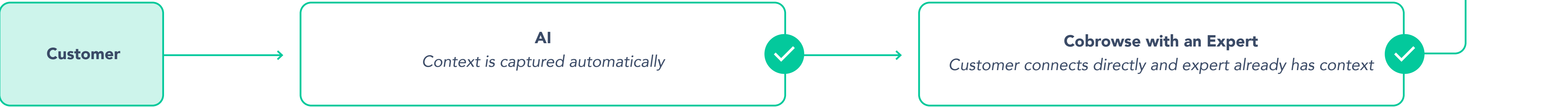
The customer begins with AI. The AI recognizes increasing complexity. It gathers context automatically. Instead of asking the customer to switch channels or repeat information, it connects them directly with an expert through cobrowsing. The agent joins the customer's existing session. Everything the customer has already entered remains visible. The conversation continues naturally.

There isn't a restart. There's simply a transition. That's the difference between escalation and continuity.

TRADITIONAL JOURNEY



GUIDED JOURNEY



AI should strengthen relationships, not replace them

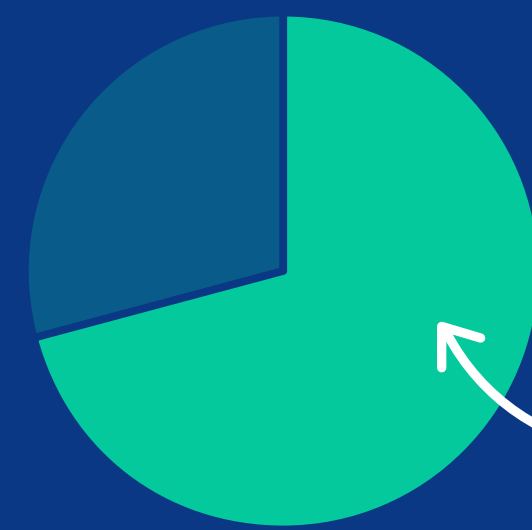
[McKinsey research](#) shows that 71% of consumers expect companies to deliver personalized interactions, and 76% get frustrated when it doesn't happen. But personalization isn't just about recommending products or remembering previous purchases.

It's about recognizing where someone is in their journey and responding appropriately.

Sometimes that response is automation. Sometimes it's guidance. Sometimes it's simply knowing when another human should step in.

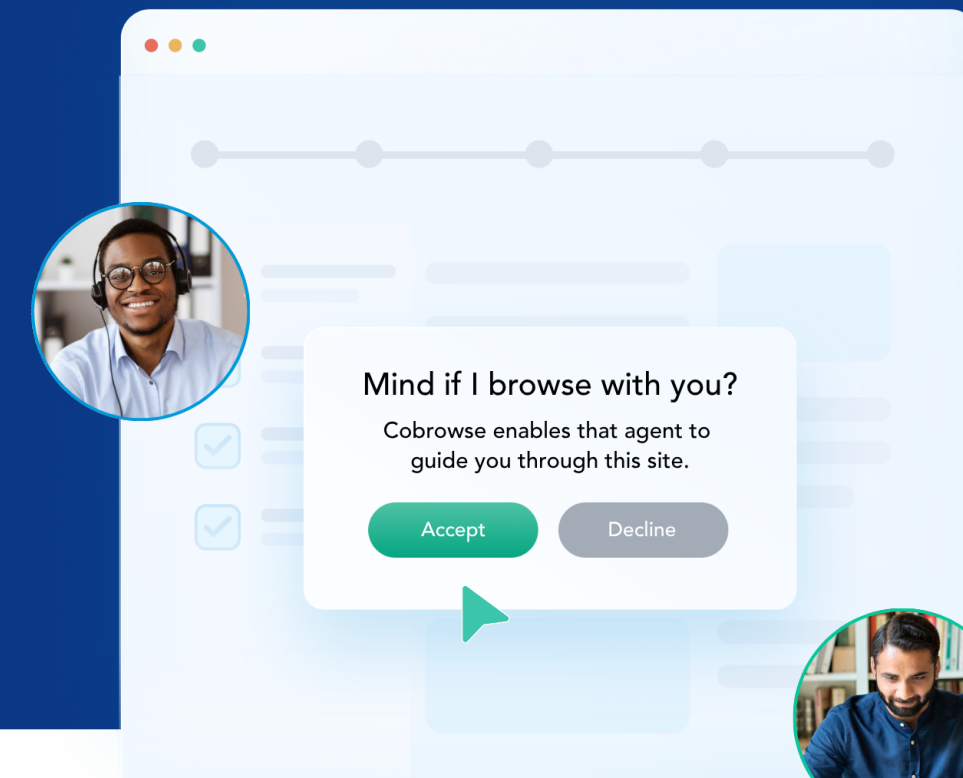
The organizations leading customer experience are designing experiences that adapt to customer needs in real time. That means using AI where it creates efficiency, using humans where they create confidence, and using guided experiences to connect the two seamlessly.

Our research found that:



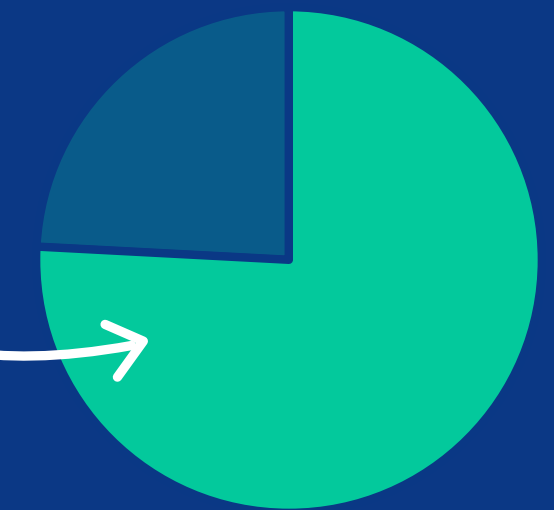
71%

of consumers expect companies to deliver personalized interactions



76%

of consumers get frustrated when it doesn't happen



The business case for visual engagement

Delivering a better customer experience is valuable. But for most organizations, improving experience isn't enough on its own. Every investment must also make business sense.

Fortunately, guided customer experiences don't require organizations to choose between customer satisfaction and operational efficiency - they improve both.

When customers complete tasks faster, agents spend less time troubleshooting. When issues are resolved the first time, repeat contacts decline. When customers feel supported, they're more likely to complete applications, make purchases, and remain loyal.

The result is measurable value across the organization.

Shorter conversations improve efficiency, but more importantly, they improve the customer's perception of the interaction. Customers feel understood from the very beginning.

Lower effort leads to higher loyalty

According to [Gartner](#), customer effort is one of the strongest predictors of loyalty.

COBROWSING REDUCES EFFORT IN SEVERAL WAYS:

- Customers don't have to leave their current session.
- They don't need to explain what they're seeing.
- They avoid repeating information.

Each improvement may seem small on its own. Together, they create an experience that feels dramatically easier.

Support teams become more effective

Guided customer experiences makes life easier for both customers and agents.

Support professionals want to solve problems. What slows them down is chasing context.

When agents can see exactly where a customer is struggling, conversations become more productive, onboarding new employees becomes easier, and teams gain confidence handling complex situations.

Instead of acting as detectives, agents become advisors. That's a better experience for everyone.

Where visual engagement delivers the biggest impact

Digital friction looks different in every industry.

A patient enrolling in healthcare has different questions than someone opening a bank account. An insurance customer filing a claim faces different challenges than a shopper making a high-value purchase online.

But underneath those differences is the same problem: Customers begin a digital task with confidence. Then something unexpected happens. They hesitate, become frustrated, or worry about making the wrong decision.

Cobrowsing delivers measurable value across industries.

In those moments, organizations have two choices:

- 1 They can ask customers to leave the experience to find help, or
- 2 They can bring help directly into the experience.



Financial Services:

Turning complex financial decisions into confident ones

Financial institutions have invested heavily in digital banking, online lending, and self-service account management. Customers expect to open accounts, apply for loans, transfer investments, and manage finances from anywhere.

Yet financial decisions are rarely simple. Customers often need reassurance before submitting sensitive financial information or committing to major decisions.

Imagine someone applying for a mortgage online. They’ve completed most of the application but stop when asked to verify income using unfamiliar terminology. Rather than guessing or abandoning the application, they request assistance.

A lending specialist joins their session through cobrowsing, explains the requirement, answers questions in real time, and helps the customer confidently submit the application.

The customer never leaves the website. The application gets completed. And the bank doesn’t lose a qualified applicant because of one confusing question.

Financial institutions also benefit from stronger security controls. Because enterprise cobrowsing can mask sensitive information and limit what agents can see, organizations can provide live assistance without exposing confidential customer data.

Common financial services use cases:

- New account opening
- Mortgage and loan applications
- Credit card enrollment
- Investment account setup
- Digital banking support
- Fraud verification
- Identity verification assistance



CUSTOMER SUCCESS SNAPSHOT

BCU Credit Union

BEFORE GLANCE

- ✗ Multiple systems to launch cobrowse
- ✗ Longer resolution times
- ✗ Members forced to explain what they were seeing
- ✗ Frustrating experience for agents and members

AFTER GLANCE

- ✓ One-click cobrowse inside Salesforce
- ✓ Higher agent adoption
- ✓ Faster, easier issue resolution
- ✓ Members can simply show the problem
- ✓ Less effort. More confidence.

“Glance allows members to show us what they’re experiencing instead of trying to explain it.”

Dane Pellegrini, Senior Product Manager, BCU

Healthcare:

Helping patients navigate complexity with confidence

Healthcare has become increasingly digital. Patients schedule appointments online, review test results through patient portals, complete medical forms electronically, and enroll in health plans without visiting an office.

While these tools improve convenience, they also introduce complexity. Healthcare terminology can be confusing, insurance options can feel overwhelming, and patients are often completing important forms while they're already stressed. A small misunderstanding can delay care or lead to incomplete information.

Cobrowsing allows healthcare organizations to guide patients through these sensitive interactions without requiring them to leave the portal or visit another office. Instead of talking patients through multiple screens over the phone, support staff can guide them directly within the portal.

Patients feel reassured, staff resolve issues faster, and appointments move forward without unnecessary delays.

For patients, the experience feels more personal. For providers, it reduces administrative burden while improving access to care.

Common healthcare use cases:

- Patient portal registration
- Appointment scheduling
- Insurance verification
- Benefits enrollment
- Financial assistance applications
- Telehealth onboarding
- New patient paperwork

CUSTOMER SUCCESS SNAPSHOT

Top-Five Health Insurance Provider

BEFORE GLANCE

- ✗ New Medicare members needed extra guidance during enrollment
- ✗ Complex online processes created friction for customers
- ✗ Agents and brokers had limited visibility into what members were experiencing

AFTER GLANCE

- ✓ Cobrowsing, screen sharing, and chat support in one experience
- ✓ Seamless Salesforce integration
- ✓ Greater adoption of the online member portal
- ✓ Improved operational efficiency for agents and brokers
- ✓ Higher customer satisfaction, contributing to stronger Medicare Star Ratin

THE RESULT

Members receive the guidance they need to complete enrollment with greater confidence, while agents resolve issues more efficiently.

Insurance:

Reducing stress during critical moments

Insurance customers rarely contact their provider during happy occasions. They're filing claims after accidents, updating policies following life changes, or seeking answers after unexpected events.

These are emotionally charged interactions where clarity matters just as much as speed.

Imagine a homeowner submitting a claim after storm damage. They're uploading photos, reviewing coverage details, and completing unfamiliar forms. They reach a section requesting documentation they don't understand.

Rather than abandoning the process or waiting on hold, they request assistance. An agent joins the session, explains what's needed, and helps complete the submission.

The customer receives immediate reassurance during an already stressful situation. The insurer receives a complete claim with fewer follow-up contacts. Everyone benefits.

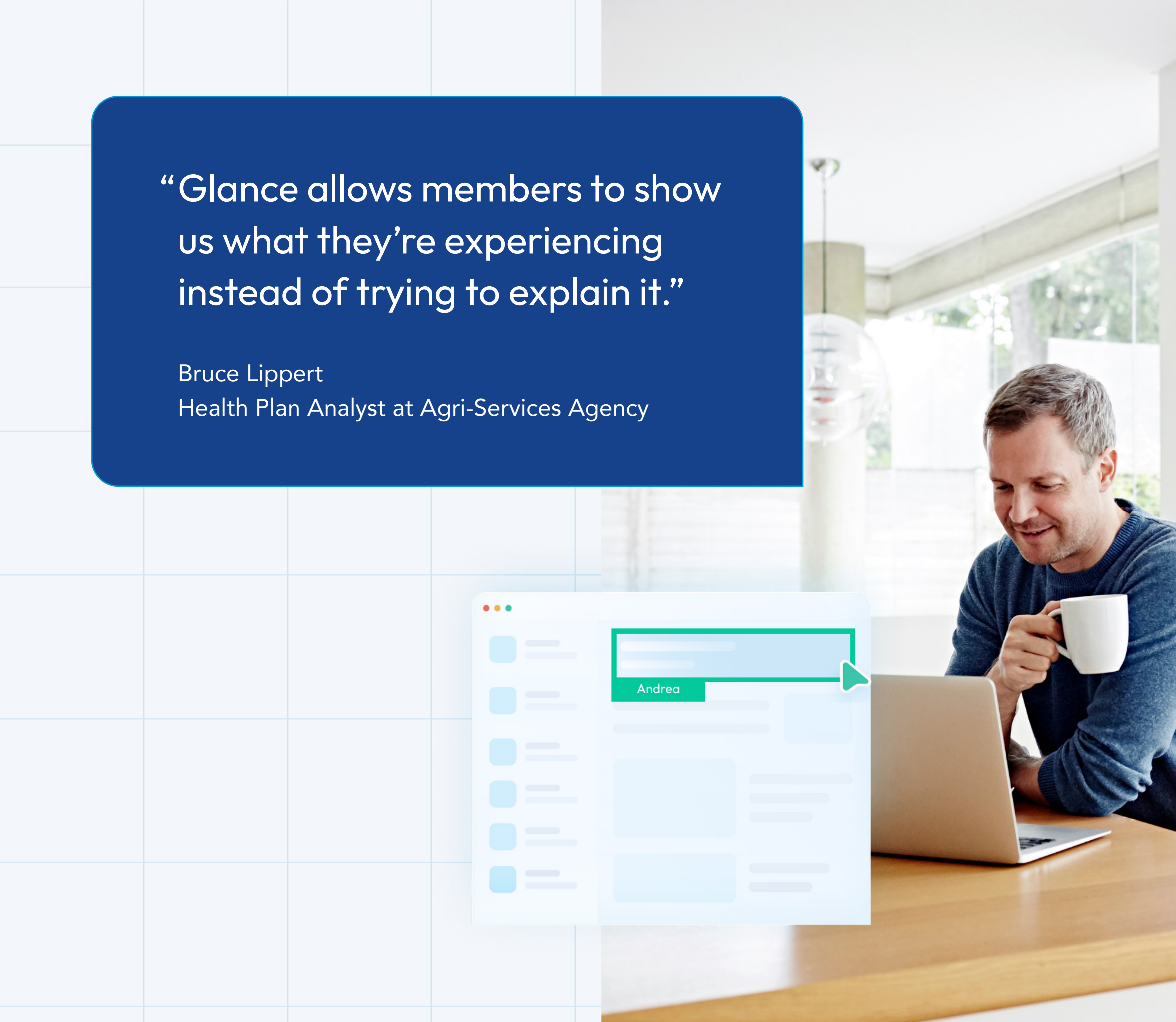
Guided assistance helps reduce mistakes that often create delays later in the claims process.

Common insurance use cases:

- Claims submission
- Policy changes
- New policy enrollment
- Billing questions
- Benefits explanation
- Document collection
- Digital claims tracking

“Glance allows members to show us what they’re experiencing instead of trying to explain it.”

Bruce Lippert
Health Plan Analyst at Agri-Services Agency



SaaS:

Accelerating onboarding and product adoption

Software companies invest enormous resources attracting new customers. The challenge often begins after the sale.

New users log in for the first time. They configure settings, invite teammates, import data, and integrate systems. One confusing setup step can delay adoption or create frustration before customers ever experience the product’s value.

Cobrowsing enables customer success teams to guide users through onboarding without requiring lengthy screen-sharing sessions or complicated troubleshooting.

Instead of saying, “Click the menu in the upper right.” Customer success managers simply highlight the correct option. Questions are answered in context, which means customers become productive faster. The result is improved adoption, stronger retention, and a better first impression.

For SaaS organizations, guided experiences help customers realize value as quickly as possible.

Common SaaS use cases:

- New customer onboarding
- Product setup
- User training
- Feature adoption
- Technical support
- Configuration assistance
- Renewal conversations

CUSTOMER SUCCESS SNAPSHOT

Constant Contact

BEFORE GLANCE

- ✗ Agents relied on customers to describe what they were seeing
- ✗ Resolving issues took longer and required more back-and-forth
- ✗ Support interactions ended when the problem was solved, missing opportunities to deepen customer relationships

AFTER GLANCE

- ✓ One-click cobrowsing and screen sharing for faster issue resolution
- ✓ Higher First Call Resolution (FCR) and Customer Satisfaction (CSAT)
- ✓ More meaningful customer conversations
- ✓ Increased opportunities to recommend additional products and services during high-satisfaction moments

THE RESULT

By helping customers reach solutions faster and creating more positive support experiences, Constant Contact turned successful service interactions into opportunities to strengthen loyalty and drive revenue.

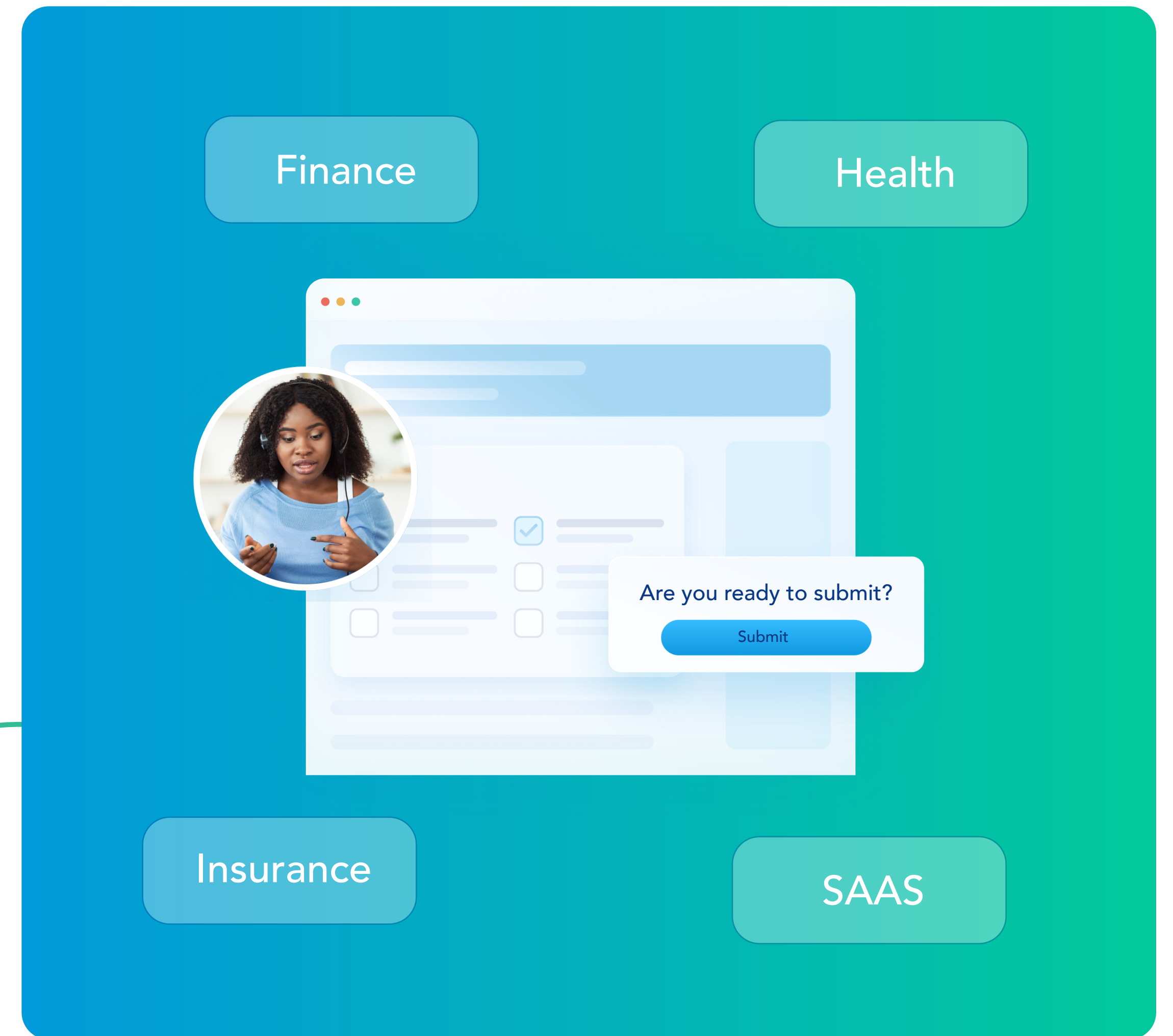
A common thread across every industry

Whether someone is opening a bank account, scheduling surgery, filing an insurance claim, shopping online, or configuring enterprise software, the underlying need is remarkably similar.

Customers want guidance without interruption.

Organizations often spend years optimizing digital experiences. Cobrowsing ensures those investments don't fall apart during the final moments when customers need another person.

Instead of replacing digital experiences, it strengthens them.



CONCLUSION

The best AI keeps humans in the loop

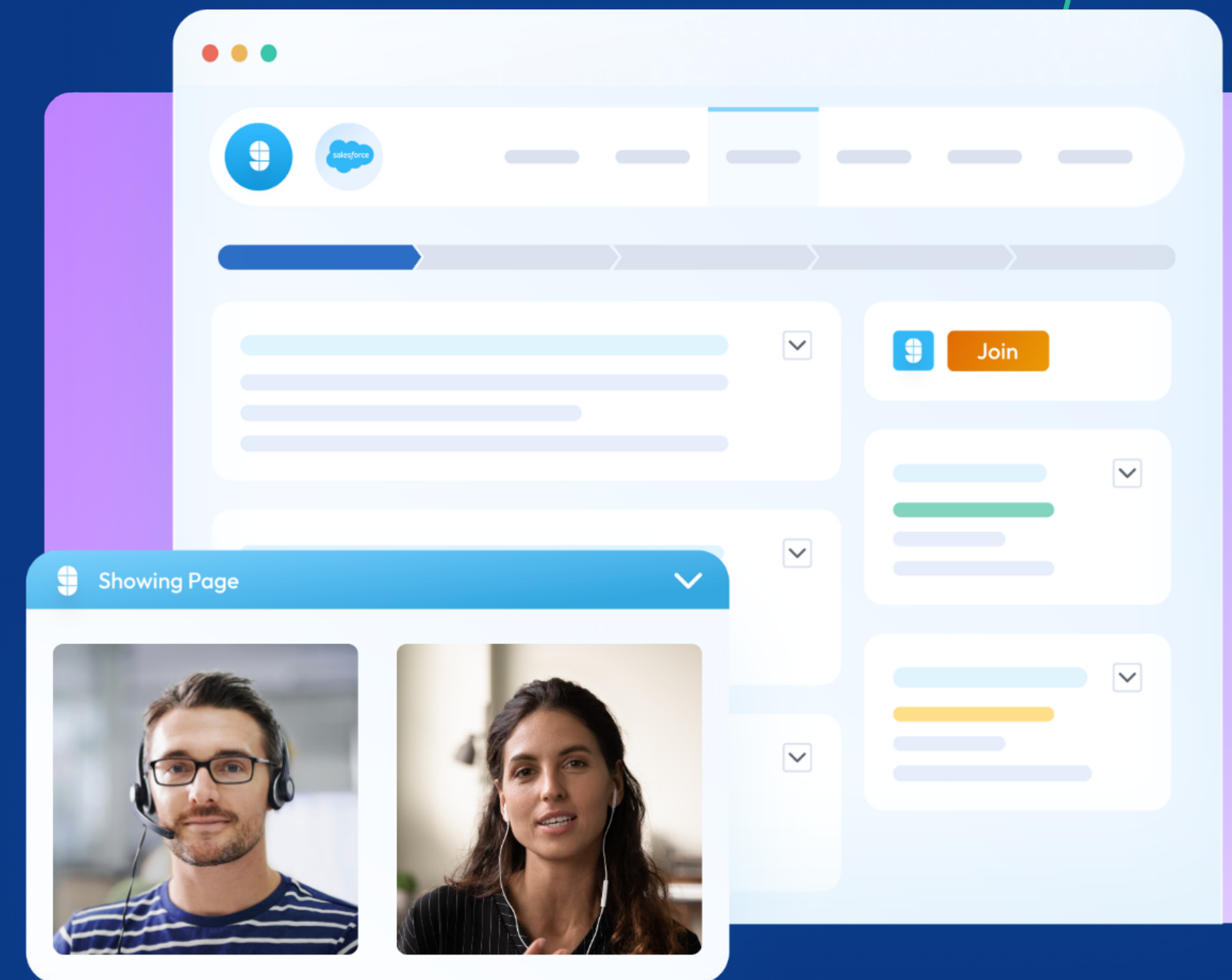
Over the past decade, organizations have invested heavily in digital transformation. Those investments have made many experiences faster, more convenient, and available whenever customers need them.

Customers aren't asking organizations to choose between technology and people. They're asking for technology that works seamlessly with people. They appreciate the convenience of AI for simple tasks and routine questions, but when they encounter uncertainty, they want immediate access to someone who can help them move forward with confidence.

That's where guided customer experiences make all the difference.

Instead of forcing customers to leave a website, switch channels, or repeatedly explain what they're seeing, organizations can bring expert guidance directly into the experience. Customers stay in the flow of their journey, agents immediately understand the situation, and issues are resolved before frustration has a chance to grow. The result is an experience that feels effortless, even when the task itself is complex.

Stop asking customers to explain what you can already see. Meet them in the moment, guide them through what matters most, and transform digital experiences into human ones.



Key takeaways

As you think about the future of your customer experience strategy, remember these five principles:

- ✓ **Digital journeys don't need more channels**
They need better guidance during moments of uncertainty.
- ✓ **AI is most effective as a partner, not a replacement**
Use it to prepare, predict, and streamline while empowering people to handle trust, empathy, and complex decisions.
- ✓ **Guided customer experiences bridge the gap**
Between self-service and live support, helping customers complete important tasks with confidence.
- ✓ **The organizations that thrive in the age of AI will combine digital convenience with human expertise**
To create experiences that are efficient, connected, and deeply personal.

Bring human guidance into every digital journey

REQUEST A DEMO



GET STARTED

Bring human guidance into every digital journey with Glance

Glance helps enterprises bring secure, real-time guidance directly into websites and mobile applications. Whether you're helping someone open a bank account, submit an insurance claim, navigate a patient portal, or onboard to a new software platform, Glance's Guided CX enables your team to meet customers where they are and help them succeed without interrupting their journey.

Ready to see Guided CX in action? [Request a personalized demo](#) and discover how Glance helps organizations reduce friction, improve customer outcomes, and create digital experiences that customers actually enjoy using.



Join the future of customer experience with Glance

Visit www.glance.cx to learn more about how Glance can help you navigate the future of customer experience.

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