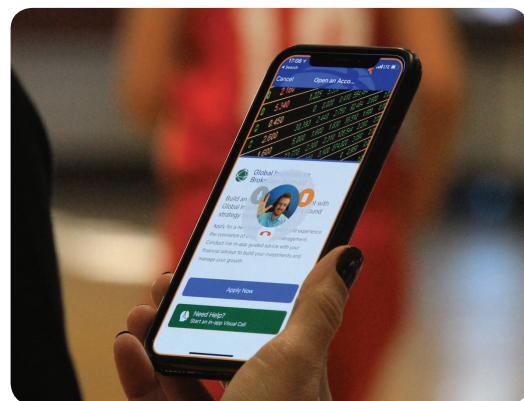# glance

Benefits:

- Improve contact center efficiency and reduce costs

- Increase customer satisfaction

- Grow revenue and lifetime customer value

- Humanize the experience for digitally engaged customers

Visual Engagement for Financial Services

Financial services companies have been digitally transforming in-branch experiences since the first ATMs. Customers prefer the convenience of digital engagement, and financial services companies prefer the operational efficiency. Glance can help you visually engage with customers and shepherd them through online transactions. Create real human connections in your digital space, to increase transactions, grow portfolio value, and build customer loyalty.

Use Cases

Online Banking

Glance lets the service agent see the screen of the customer and guide them through online account management and transactions. Glance is proven to improve the results of self-service initiatives, retrain customers to use new digital processes, reduce operational service center costs, and increase customer satisfaction.

Digital Loans

The lenders that will succeed in this new digital loan era are the ones that empower agents to join borrowers on-screen, to offer guidance in the complex and stressful application process. Glance transforms customer frustration into completed transactions and more opportunities to grow lifelong customer bonds.

Advisory Services

Glance is the first complete solution for transforming in-branch financial consultations into digital meetings. Financial advisors can launch sharing sessions with the click of a button to connect with customers on desktop or mobile devices. Present portfolio performance and investment options. View the customer's browser or app screen and guide them while they trade and transact.

See the problem
Glance enables your agents to instantly see what users are seeing on-screen, to quickly understand problems and guide them to a speedy solution.

Guide the solution
The agent can highlight elements on the customer's screen including text, graphics, form fields, and navigation controls. Agents can guide the customer and follow from page to page as the customer navigates the website or app.

Build trust and empathy
Glance allows agents to transform customer frustration into engagements that create long-lasting customer bonds. With Glance, the customer can even see the friendly face of the agent, humanizing your brand (optional).

Present, demo, and consult
Glance can also show the agent's screen to the customer -- perfect for presenting and demoing to close the sale or for delivering advisory services.

Connect with one click -- no download
With a simple click of a button your agent can launch a sharing session — no need for the customer to download any software. Glance is integrated with your existing CRM and contact center technology for a frictionless workflow and effortless user experience.

Works on any desktop computer, any mobile device
Agents can see the screen of users of your desktop software, website, browser based app, or native mobile app. Glance gives you a consistent agent and customer experience on every digital platform.

Enterprise scalability & security
Glance is enterprise-proven in some of the largest companies and high-volume contact centers in the world. And Glance is engineered to comply with strict customer privacy and security requirements, perfect for financial services, healthcare, software, and insurance.

Integrations

zendesk

Microsoft

salesforce

docutech

servicenow

WE HAVE THE ABILITY TO HAVE OUR EXPERTS SEE WHAT THE CUSTOMER SEES AND HIGHLIGHT AREAS TO HELP DIRECT THE CUSTOMER. OUR ONE-WAY VIDEO LETS THE CUSTOMER CONNECT THE TURBOTAX EXPERT THEY ARE SPEAKING WITH. IT'S BEEN A GAMECHANGER FOR INTUIT.

INTUIT

Stacie Herring,
Director of Assisted Experience

ENABLING LENDERS TO SEE WHAT THE CUSTOMER IS SEEING IN THE DIGITAL ENVIRONMENT AND OFFER GUIDANCE AND PERSONALIZED SERVICE AS NEEDED THROUGH GLANCE COBROWSING IS INCREDIBLY VALUABLE.

docutech

Amy Brandt,
President and CEO of Docutech