Video Enabled Customer Engagement

Dana Stetson, VP of Sales - Financial Services

Video Communication Has Become Mainstream

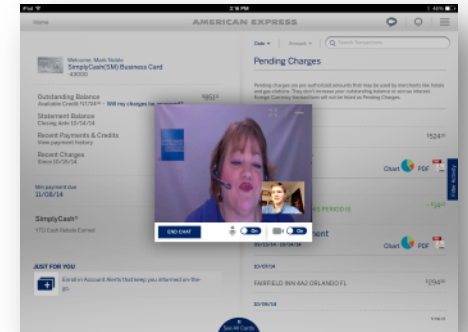Video builds stronger relationships across the web

Video-enabled Customer Engagement is Gaining Momentum

Salesforce.com SOS

Amazon Mayday

American Express Live Chat

When Video Trumps Text Chat and Voice Calls

- High value customers
- High value transactions
- Relationship selling

Best Practices for New Video Deployments

Control → Choose a controllable use case

Simplify → Postpone call center integration

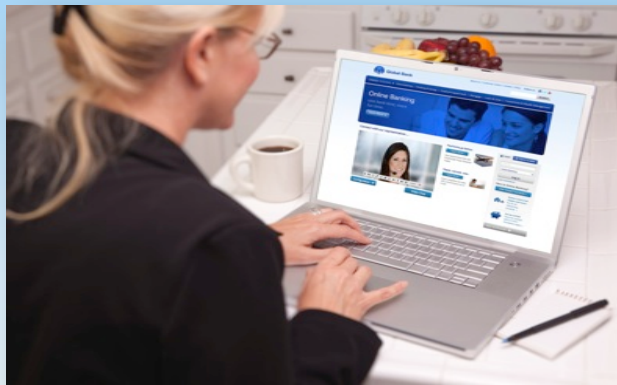**Deploy** → Mobile app for consumer;
Existing workflow app for agent

Video Customer Engagement Considerations

Agent	Customer	Content

Asset Allocation
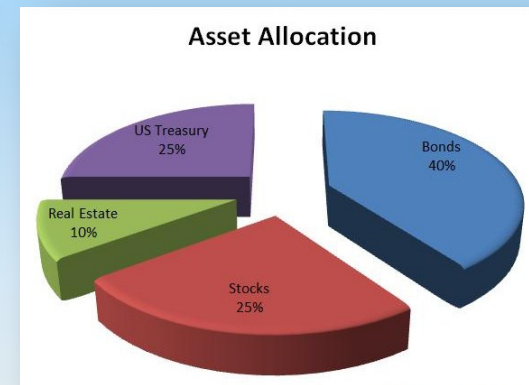
- No multi-tasking
- Agent environment
- Physical appearance

- Start with client in privacy mode
- Enable client to send video
- Client can always see agent

- Agent content sharing
- Client content sharing
- Annotation tools useful

Top 10 US Banking Firm
Wealth management for high net-worth customers

- Financial advisor
- Anytime face-to-face
- Relationship management

- Loan origination
- Investment services
- Account management

- 638 branches
- 1,238 ATMs
- 439 locations
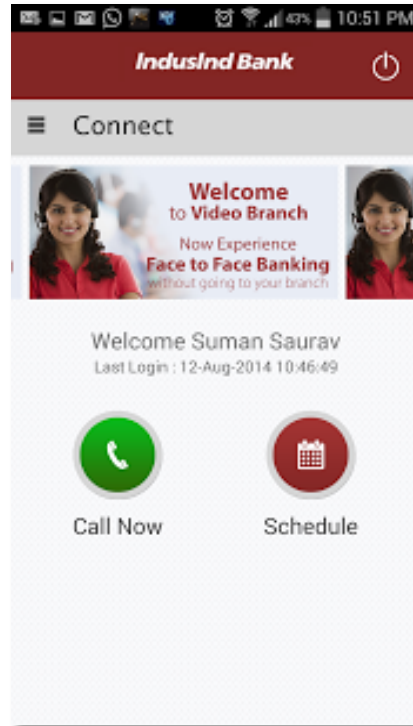
Getting Started with Video Customer Engagement

1. Gain Buy-in
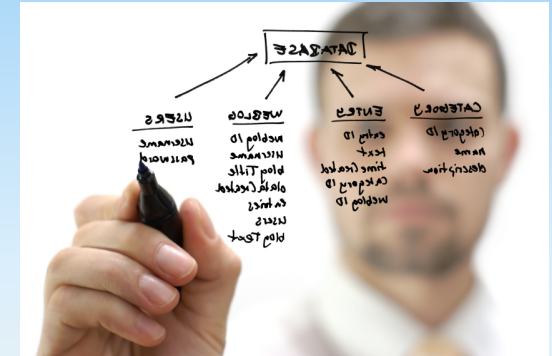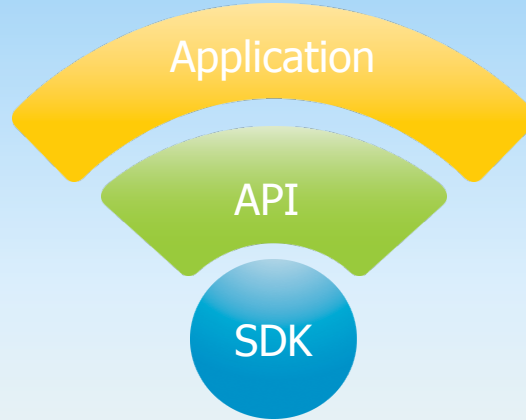
- Need business **champion**
- Shares **strategic** vision
- Understands time-to-market **urgency**

2. Technology Selection

Application

API

SDK

- **Quality** over Internet & broadband
- Extensible software **platform**
- Ability to **scale** for growth
- **Proven** leadership in video communications

3. Development Partner

- **Experience** with video
- **Proven** real-time customer engagement track record

Thank you!

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