ORACLE

Making Sense of Visual Engagement for Customer Service

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✳ **Spark Series**

What is visual engagement?

Visual engagement is all about real-time collaboration with customers on channels that feature a dynamic visual element. Serving as an on-the-go primer, this guide addresses the fundamentals of visual engagement to help you quickly grasp how the practice can better serve your customers and bring value to your business.

Here are some ways customer service agents can use visual engagement in your contact center.

- **Helping customers navigate** to specific information on the website, such as technical specifications or assembly instructions

- **Assisting customers** to complete an online purchase, form, or other process

- **Demonstrating a product** such as software or a small device

- **Diagnosing and resolving problems** such as incorrect software installation or the damage to an item during shipping

Why it matters today

Engagement with dynamic visual content is growing. Consumers watch more than a billion hours of YouTube content every day[1], with the platform reaching more 18 to 49-year-olds than any broadcast or cable TV network.[2] In the business context, the global pandemic has increased reliance on video, as organizations have turned to the visual medium to conduct operations. As businesses and consumers continue to become more comfortable and capable with video, the importance of visual engagement will increase.

The technology infrastructure is there, too. A majority of Americans have high speed internet at home to support video, and an even higher percentage have smartphones with a video camera.[3]

Consumers use a growing number of communication channels that provide increasingly humanized experiences. This raises the stakes for businesses, as customers expect to receive the same level of convenience, connection, and ease they experience in their personal interactions.

The basics

By understanding visual engagement and its techniques and benefits, you'll be able to better serve your customers.

Part 1: Types of visual engagement

A. Video

Video is probably the most frequently employed channel. Agents use it to see customers or devices, which helps facilitate understanding and human connection. Video can either be one-way, when the agent is on video but the customer is not (or vice versa), or two-way, when both parties can see each other.

B. Cobrowsing

This technology enables you to interact with a customer by using his or her web browser to navigate. Agents are only able to see the selected web page, while other open windows and applications remain hidden.

C. Screen sharing

Sharing access to a computer screen remotely—either the agent to the customer, or the customer to the agent—helps you troubleshoot, instruct, and collaborate. Data controls mask sensitive information on customer screens.

D. Screen annotation

On a shared web page, agents may highlight, circle, underline, and add notes to content to help customers cut through the clutter and access the most relevant information.

E. Supplemental technologies

You may also add these technologies to ensure optimal customer support.

- **Recording and transcribing interactions** for later review by management helps improve service quality and uncover opportunities for training agents.

- **Third-party conferencing** enables agents to pull in extra help if they need a consultation to resolve an issue.

Part 2: Initiating visual engagement with your customers

A. Direct links on your website

Through easily visible direct links on your website, customers can start a text-based chat, voice, or video session. These options can be displayed all the time on every page, or you can limit the options to certain business hours or certain pages. You can also limit access to certain types of customers, such as those who have paid for premium support packages, loyalty rewards members, or high-value accounts.

B. Invitation after escalation

If a customer still has an unresolved issue after interacting with the first channel or channels, you can escalate their case to a deeper level of engagement, such as video or cobrowsing. Escalations can be raised in different ways, for example

- **Automatically by a bot** based on text the customer enters

- **At the customer's request** by clicking a button or entering the inquiry in a chat window

- **By your agents**, who may escalate the interaction from chat, voice, or phone to video or cobrowsing

Part 3: Business value

A. Cost savings

Visual engagement is an excellent way to improve efficiency, especially as it relates to two key metrics.

- **First call resolution (FCR):** The percentage of customers that achieve resolution during their first contact, with no further action required

- **Average handle time (AHT):** The amount of time it takes to resolve an issue from start to finish, including hold time

By being able to see problems faster and fix them then and there, you'll reduce your cost of service and time to serve.

B. Increased satisfaction

With visual engagement, you can provide the high-quality service your customers have come to expect. When customers have a convenient option to video chat or share their screen, it reduces frustration and keeps them engaged, so you can solve their problem. Live, "face-to-face" interaction imparts a human element to your experience and builds connection to your brand. Driving higher customer satisfaction supports long-term customer loyalty. And over time, this will help your organization achieve a higher Net Promoter Score (NPS)[4], which measures customer experience and predicts business growth.

NPS is calculated by asking customers, on a scale of 0 to 10, "How likely is it that you would recommend [brand] to a friend or colleague?"

C. Higher revenue

Visual engagement adds a human touch that will help you boost conversions and turn prospects into customers. You'll also be in a better position to increase upsell and cross-sell opportunities.
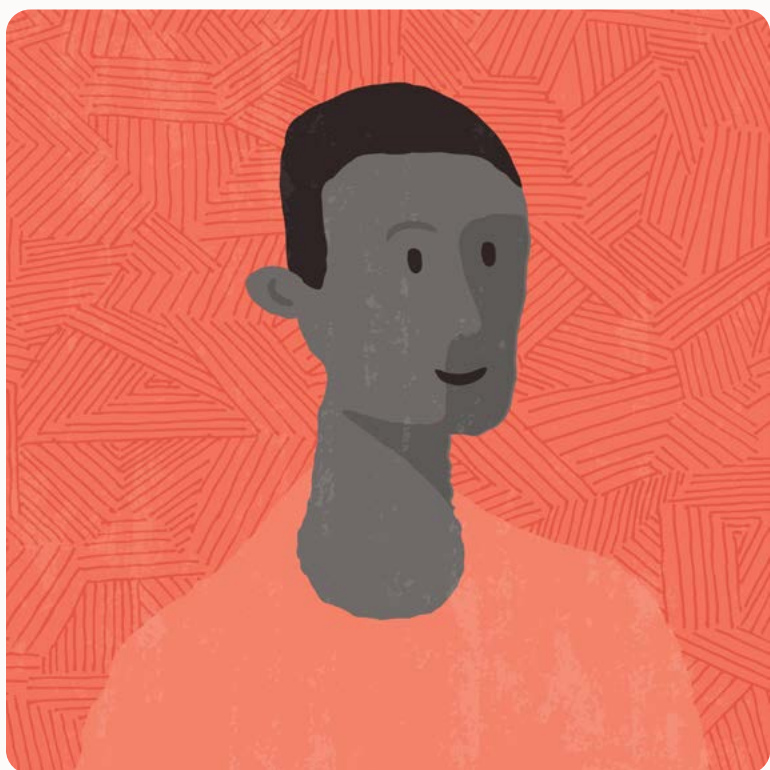
What's next?

Keeping current with the latest visual engagement technologies isn't just important from a customer experience standpoint. It's also critical for recruiting and retaining customer service agents. Modern tools, such as the following, will help attract potential employees who are used to interacting through video, and to retain current agents by making the experience of serving customers easier and more satisfying.
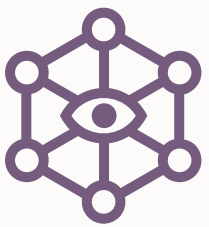
Visual sentiment analysis

Powered by artificial intelligence, this technology evaluates human facial emotions, which helps agents to more effectively identify and interact with unhappy customers and offer upsell opportunities to satisfied customers.
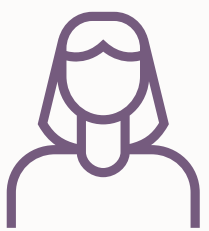
Facial recognition

Face-scanning technology that verifies the customer's identity on video provides additional protection when security levels are high due to sensitive information.

A view toward practical solutions

When visual engagement capabilities are embedded into contact center management software, your organization benefits from the following:

- **More options** for initiating and controlling the interaction, for both agents and customers

- **Enhanced security features** to protect agents and customers

- **Smooth transitions between channels** while capturing and connecting data throughout these transitions, giving the agent complete context at all times

Are you ready to spark a shift in your CX? Visit us to learn more and get started.

To the experience-maker who's always moving forward

At Oracle, we know great experiences come from great inspiration, and we're providing the spark for your next idea. Packed with powerful info, the Spark Series will get you up to speed on core CX concepts—such as visual engagement—quickly.

Think of it as a way to hone your understanding before turning your eyes toward a new strategy. Because if anyone's going to create CX gold, it's you.

What will you discover next?

- [Blog: The ROI of Visual Engagement](#)

- [Blog: 7 Business Trends for Successful Visual Engagement](#)

- [Product Info: Oracle Live Experience Cloud](#)

About Oracle Advertising and CX

Make every customer interaction matter by connecting all your business data across advertising, marketing, sales, commerce, and service. Oracle Advertising and Customer Experience. (CX) is a connected suite of applications that goes beyond traditional CRM to help you create and nurture lasting customer relationships. Build a complete view of every customer and every interaction, no matter how and when they engage. Empower your entire business to deliver exceptional customer experiences—from acquisition to retention—and everything in between.

Sources

1. Cristos Goodrow, "You Know What's Cool? A Billion Hours," YouTube official press page, accessed February 4, 2021

2. Celie O'Neil-Hart and Howard Blumenstein, "The Latest Video Trends: Where Your Audience Is Watching," Think with Google, accessed January 22, 2021

3. "Internet/Broadband Fact Sheet," Pew Research Center, last modified June 12, 2019

4. "Net Promoter Score: A Metric from the Experts," NICE Satmetrix, accessed January 22, 2021

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