



ScreenMeet

ScreenMeet and Salesforce Service Cloud: Enhanced Personalized Service for Virtual Customer Sales and Support

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Today's Standard: Enhanced, Personalized Service Through Every Channel

As the trend toward online self-service and virtual interaction with customers has been increasing, more customers, both B2B and B2C, have discovered that not only can they manage business relationships virtually, but they also prefer it over face-to-face or even phone. With this new expectation of having options for support, when customers need to interact with sales and support agents one-on-one, very often they now want to do so virtually.

Going forward, businesses will have to differentiate themselves by enhancing the buying experience, but not through in-person sales. Instead, they will need to rely on online personalized customer interactions, which includes helping the customer through the buyer's journey, advising on product selection, facilitating purchases, and resolving problems.

That puts added pressure on businesses like yours. It is no longer enough to have an online presence with a knowledge base and chat capabilities. Today, businesses must go much further to differentiate their customer experience.

How will you provide those personalized customer interactions with your sales and support staff?

Making Online Interactions Unforgettable

To create a unique online experience that attracts new customers and helps keep them loyal, businesses are choosing tools that enhance interactions with live sales and help desk personnel.

One such tool, Salesforce Service Cloud, provides an online platform that lets businesses offer concierge-level services to their B2B and B2C clients. Service Cloud lets agents offer personalized service by giving them the support tools they need to have visibility into every customer interaction. Using Service Cloud, agents see a customer's online activity in their console so they can offer meaningful responses and experience fast resolution times.

The traditional model of agent interactions, whether online or telephone, was to keep the live interactions as short as possible. Now, however, businesses are finding that allowing the agent to spend more time with the customer in a customized, live interaction creates additional revenue and achieves greater customer satisfaction.

How ScreenMeet Works with Salesforce Service Cloud

Since customers interacting with live agents is quickly becoming the "new normal" sales, service, and support experience, making the most of these customer interactions requires customer service tools with innovative features.

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ScreenMeet is quickly becoming the platform of choice by customer support professionals to meet that demand. A real-time digital engagement platform, ScreenMeet integrates with Salesforce Service Cloud to provide additional capabilities, like chat, video, screen sharing, file transfer, and desktop takeover. Traditional CRM engagement tools used to facilitate virtual B2B and B2C sales, service, and support are missing this real-time component that must be a part of the consumer and business web to capitalize on this transformation of the economy to a digital-first world.

Adding ScreenMeet to Service Cloud provides agents with the ability to send a link via the Salesforce chat that the customer uses to enter a truly personalized, interactive session with the agent. This has resulted in real value for ScreenMeet clients, such as Salesforce, enabling them to **close out 35 percent more support tickets on the first call**. That 35 percent translates into immediate ROI in customer wait time and agent handling. Plus, all the data generated during the customer session automatically goes back into Salesforce and becomes part of the customer record for future interactions and proactive outreach.

Use Cases

1. ScreenMeet for eCommerce/Online Sales

ScreenMeet helps enhance online customer experiences by providing real-time access to service agents at the appropriate time, to help users overcome a variety of obstacles in the buying process, such as an inability to view product details or difficulty completing forms or payment information.

Using ScreenMeet, sales agents can interact with customers using voice, text chat, video chat, cobrowse, and file sharing to help eliminate buyer frustration and reduce cart abandonment.

In fact, ScreenMeet clients have seen an **overall increase in revenue by 30% for each online shopping session** using ScreenMeet.

ScreenMeet works within a standard web browser, so neither the customer nor the sales agent is required to download additional software. Plus, ScreenMeet can work independently or integrated with your CRM system, such as Salesforce, so it's one login with the Salesforce credentials, and all agent interactions can be automatically captured as part of the customer record.

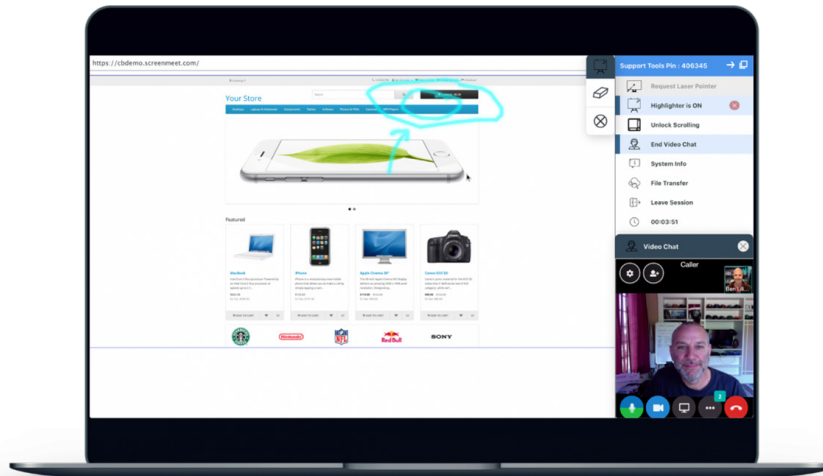
Agents can use ScreenMeet to provide live text or video chat with cobrowsing to help customers by leveraging the following features:

- **Annotation Tools**

ScreenMeet provides drawing and text tools so the customer support agent and the customer can highlight specific aspects of the webpage, making it easy for agents to help their customers find links, pages, products, forms, and any other information they may be having trouble locating while conducting a live video chat with them to help them through the process.

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At the end of the session, the customer has accessed the information they were looking for without the frustration of having to find it themselves. For high-value content, such as reports and product demonstrations, this could easily mean the difference between a satisfied customer and a lost sale.



Screen sharing is a critical capability to help our customers in this digital-first world. With ScreenMeet's integration with Service Cloud, it also makes it seamless to use for our support engineers.

Jim Roth - EVP, Customer Support, Salesforce

■ Two-Way Video

Real-time video interaction allows the agent to interact with the customer during the session, creating an atmosphere of personalization and trust similar to an in-person meeting. Coupled with cobrowsing, the agent can point out the various features and benefits of the product, providing upsell and cross-sell opportunities.

■ File Transfer

File transfers help agents and customers share files, including Word documents, PDFs, and applications, that help the buyer complete the sale. Often, prospects have trouble accessing needed forms and documents from the website. File transfers can be used by the agent to provide forms, product specifications, and user manuals to the customer, or used by the customer to provide the agent with completed forms and documentation.

■ Session Recording

Cobrowsing sessions can be recorded, and the recording automatically attached to the customer's support case for future reference. Recording a cobrowsing session allows agents to watch how previous interactions with the customer have progressed so they can try different solutions to resolve the customer's issues.

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- **Secure Data Masking**

ScreenMeet's cobrowsing capabilities provides masking of the customer's Personally Identifiable Information (PII) to protect confidential information from unintended exposure. Sensitive information is kept from being seen by the agent, including names, addresses, phone numbers, Social Security numbers, driver's licenses, credit card information, and passports.

2. ScreenMeet for Virtual Customer Service and Support: Personalized Interaction Delivering a Brick-and-Mortar Experience

Service companies needing to meet the demands of customers who cannot or will not go to their physical brick-and-mortar locations, now require a way to provide the same degree of professional, one-on-one consultations through virtual interaction, including the confidence, trust, and security of the previous in-person interactions.

ScreenMeet helps service companies conduct one-on-one sessions with their clients, exchanging files and helping them navigate their website, to give their clients the personal attention they have come to expect. Since the sessions are captured as part of the customer's CRM record, other agents, regardless of geographical location, have access to the customer's information and previous interactions so there is no interruption in the quality of service provided.

By providing a more personalized experience with virtual customer service and support, ScreenMeet clients such as **Salesforce**, have experienced an average of 35% increase in First Call Resolution and a significant reduction in case resolution times, **resolving them in less than 30 minutes instead of five days or more**. Plus, ScreenMeet has an overall 4.75/5.0 Agent Satisfaction Rating.

Security as a Critical Component

ScreenMeet was created with data security top of mind in the design, deployment, and maintenance of our network, platform, and applications. Agents log into Salesforce (or whichever CRM platform is being used) via SSO which places no additional logins needed for ScreenMeet.

ScreenMeet's cobrowsing capabilities prevents the customer's Personally Identifiable Information (PII) from being seen by the agent, shielding confidential information from unintended exposure. Sensitive information, such as names, addresses, phone numbers, Social Security numbers, driver's licenses, credit card information, and passports, are blurred from view by the agent. These fields are selected when setting up ScreenMeet for a customized experience to mask the data your business needs, while keeping it secure for your customers.

For example, as part of its COVID response to the shuttering of their physical offices in March 2020, one global tax company that had 12,000 offices, implemented ScreenMeet Cobrowse and Live and quickly had 650 agents using it by April 2020.

Now the company is looking to expand the virtual option to the rest of their 2,000 call center agents and 100,000 tax advisors.

"COVID forced us to pivot rapidly to not only protect our employees and our clients, but also meet the changing demands of what consumers expect when they consume services," according to their Director of Enterprise Architecture. "Now, virtual customer interaction is not simply a way to resolve problems and perhaps upsell or cross-sell the customer, it will now become the primary method of how customers consume our services."

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ScreenMeet Advantages

- **Cloud native architecture** – Flexible scalability and performance with a browser based in-platform experience. No maintenance, no download, no administrative overhead.
- **Fully integrated, in-platform with Salesforce Service Cloud and other CRM applications** – Looks and behaves like a Salesforce Service Cloud feature. Start sessions directly inside of your existing IT Workflow.
- **Ease of configuration** – No additional accounts or user database to manage. Roles are automatically created during the installation, and they only need to be assigned to the users and groups that will use ScreenMeet.
- **Integrated reporting** – Reporting rolls up into your existing Salesforce reports.
- **Session Logging** – All information about the session is written back to the Salesforce Service Cloud Incident.
- **Fast and Accessible** – ScreenMeet is cloud-based and globally distributed, across 14 AWS data centers in North America, Europe, Asia, India, and Australia. Ensuring maximum availability.
- **Scalable** – ScreenMeet is always highly available and hosts millions of sessions simultaneously.
- **Compliant** – ScreenMeet is SOC 2 Type 2 certified.
- **International** – ScreenMeet can be localized and is currently available in English, German, Spanish, French, Italian, Taiwanese, Japanese, Chinese, Korean, and Portuguese.

Added Value with ScreenMeet

Implementing the right support software into your current business processes will allow your company to succeed by remaining connected with your customers in a virtual-first, work-from-anywhere world. With ScreenMeet, you gain the ability to address issues in real-time through chat, screen-sharing, and video, with interactions logged within your applications. Your team will be able to address most issues or concerns in just one session allowing for increased productivity and the continuation of the workflow without unnecessary disruptions or delays.

ScreenMeet is used by companies, small and large, with 60% of our customers in the Global 2000. Our clients consistently report higher conversion rates, increased revenue, and happier customers.

Next Steps

We invite you to read the complementary eBook, [“The Future of Service”](#) and watch this [on-demand session](#) which the eBook references, where you’ll learn how Salesforce support uses Service Cloud + ScreenMeet to drive frictionless customer experiences.

To learn more about ScreenMeet for Salesforce, and discover how our customers such as Salesforce, Choice Hotels, and OpenTable are improving their customer experiences and decreasing costs, please [visit our website](#), and contact us for a customized [product demonstration](#).



ScreenMeet



ScreenMeet is a prime example of the innovative technology partners we use to further enhance our easy and expert customer experience.

Jim Roth - EVP, Customer Support, Salesforce

About ScreenMeet

ScreenMeet delivers better real-time online experiences, with easy, secure, and reliable voice and video calls, chat, cobrowsing, and remote support. ScreenMeet customers around the world use it to drive best-in-class customer, employee, remote work, and remote support experiences. Founded in 2016 by cloud, online meeting, and customer support veterans to build solutions to support better real-time online experiences, ScreenMeet delivers those customer, employee, and remote-support experiences for hundreds of customers worldwide.