

Achieving The Effortless Member Experience

Justin DiPietro, COO and Co-Founder, Glia

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the credit union company

Knowledge. Insight. Strategy.

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- If your audio is choppy or slow, you may wish to dial into the teleconference:

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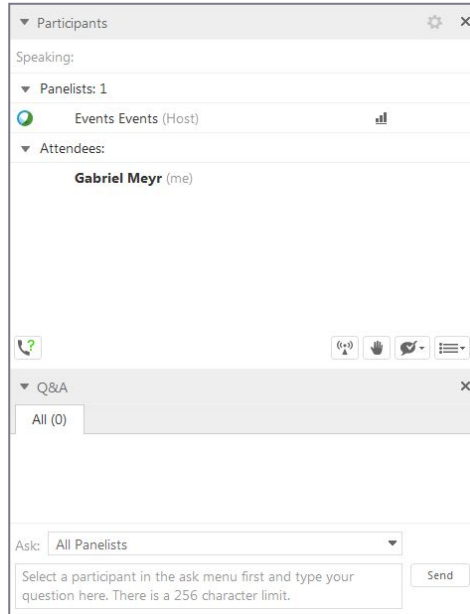
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Slide Link

Today's slides can be found online at:

<http://bit.ly/2019-06-27-glia>

We Encourage Questions



Use the

Questions Box

located on the right side of the screen, to type your comments or questions.

Tell Us What You Think!



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Glia Webinar in partnership with Callahan

June 27th, 2019

Your Host

Justin DiPietro, Co-Founder & COO

- Co-Founder of Glia, where he is responsible for product strategy and direction and day to day operations.
- Prior to Glia, he worked as a consultant with top enterprises on customer and technology strategy.



Agenda

1



About Glia

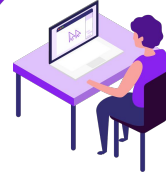
2



Member Effort

- What is Loyalty
- 3 Findings
- A new Metric

3



Effortless
Experience

- Digital-First Communication
- On Screen + Near Screen calls
- Digital Disloyalty

4



Key Takeaways

About Glia /

Introducing Glia



Glia cells

- Glue all neurons together
- Support all communication within the brain
- Make cognitive function possible



Glia platform

- Glue all channel options together
- Support all communication with Members
- Makes modern Member experience possible

Our Vision is to combine the

human touch with technology

to create the

best member experiences.

PSECU Case Study:

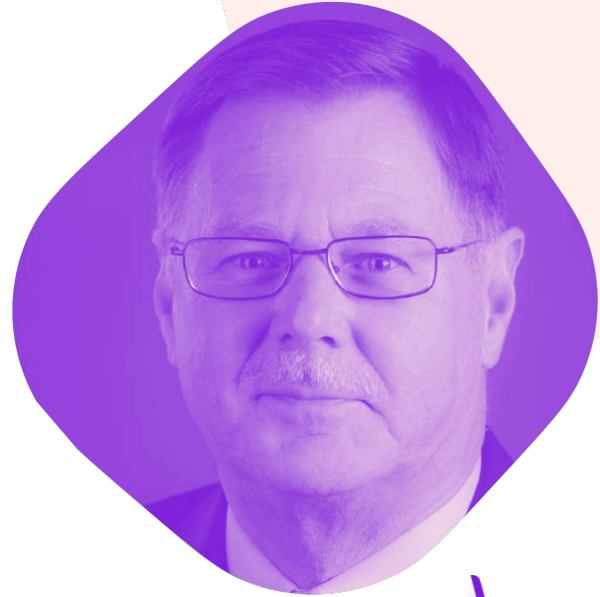
“Glia enables us to serve our Members more effectively, more efficiency and provide a much better Member Experience overall.”

**137%
Increase**

In CoBrowsing usage
year-over-year

**160%
Increase**

In digital engagement
interactions year-over
-year



Greg Smith
PSECU President

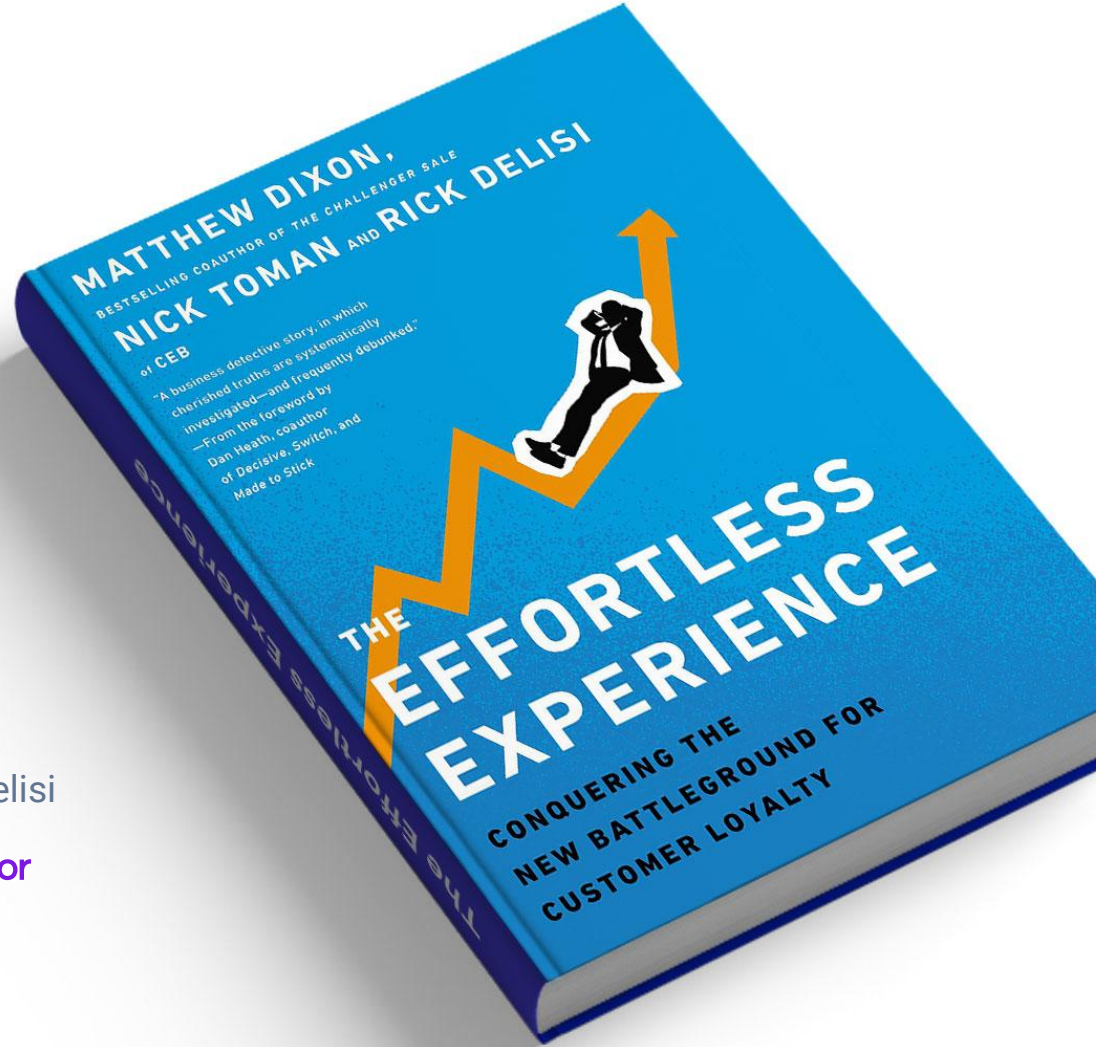
Member Effort

A New Way to think about Member Experience

The Effortless Experience

Matthew Dixon, Nick Toman, Rick Delisi

Conquering the New Battleground for
Customer Loyalty



What is Loyalty?



Wallet sharing



Repeat Business

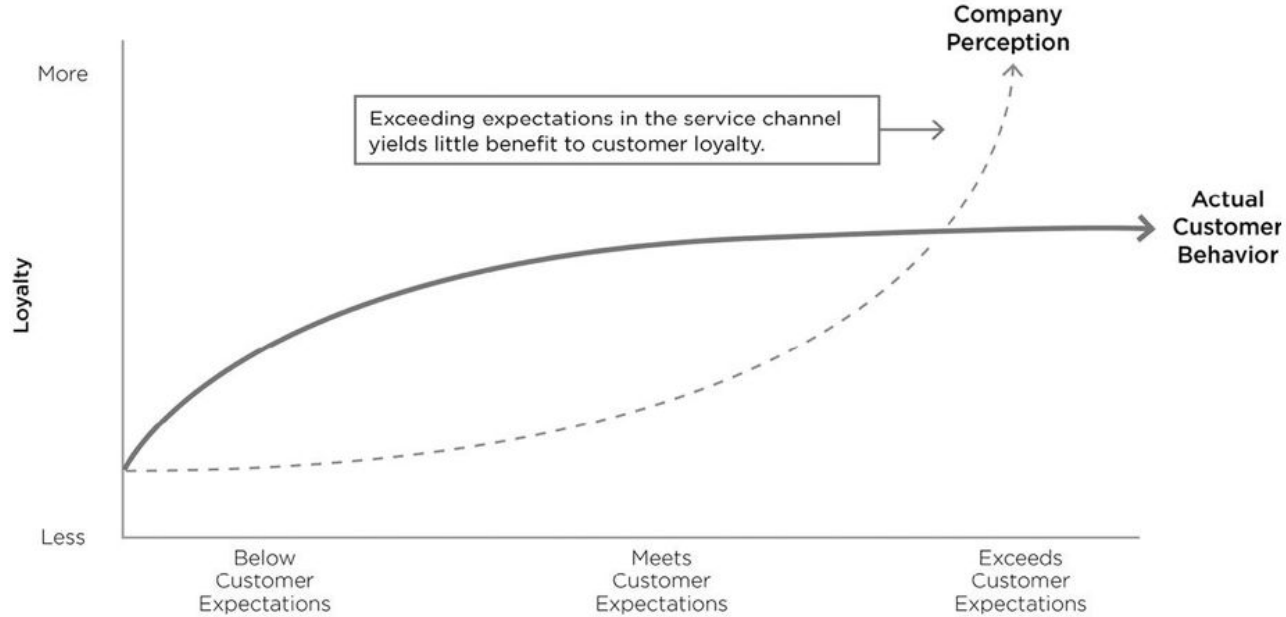


Member Advocacy



Finding 1:
Blinded by Delight

Finding 1: Blinded by Delight



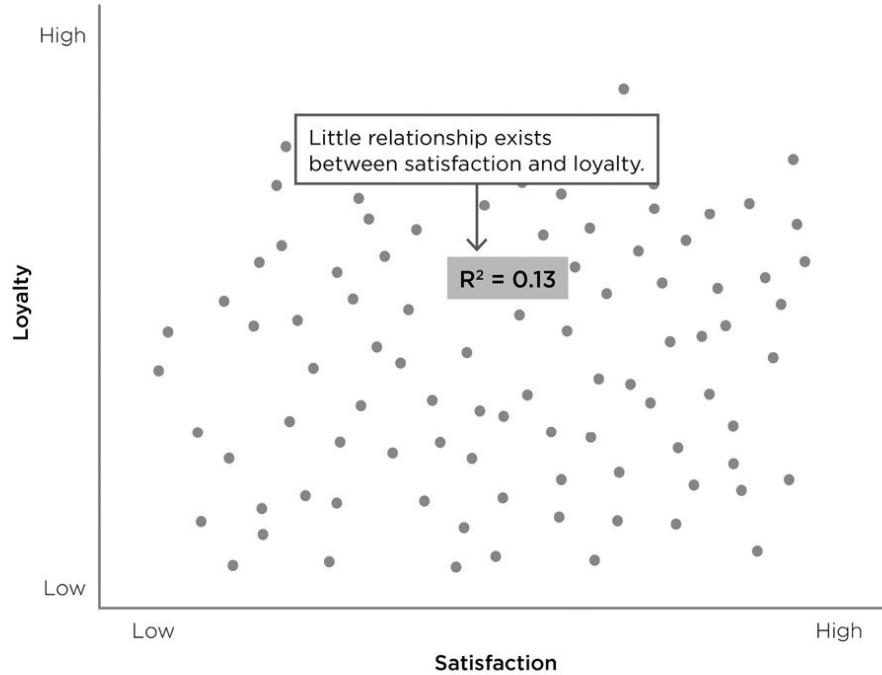
n = 97,176 customers.

WHY ARE THEY NEVER
SATISFIED?



Finding 2:
CSAT \neq Loyalty

Finding 2: CSAT ≠ Loyalty



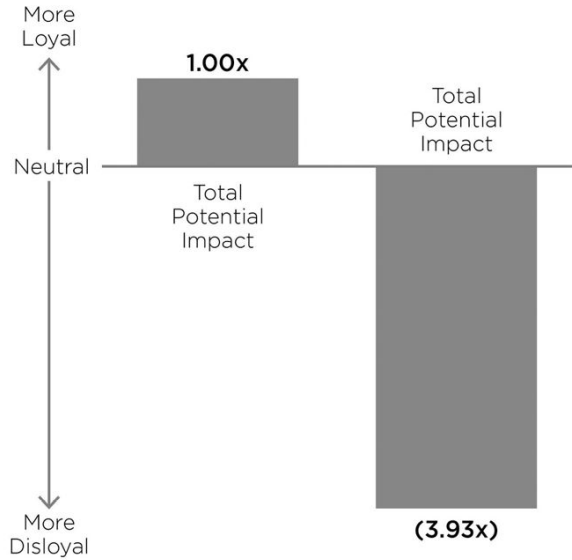
n = 97,176 customers.



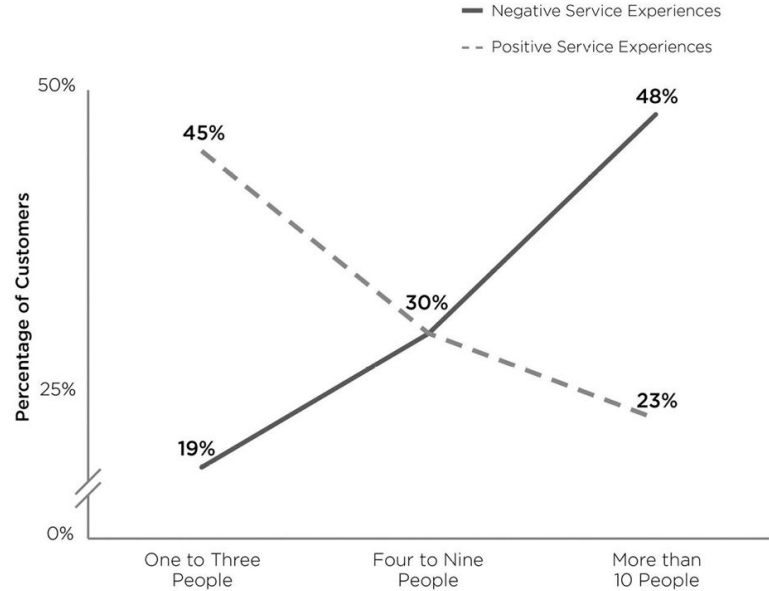
FINDING 3:

Decrease Disloyalty

Finding 3: Decrease Disloyalty



n = 97,176 customers.

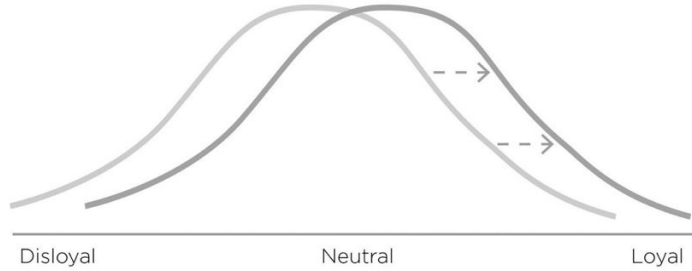


n = 97,176 customers.

Customer Effort

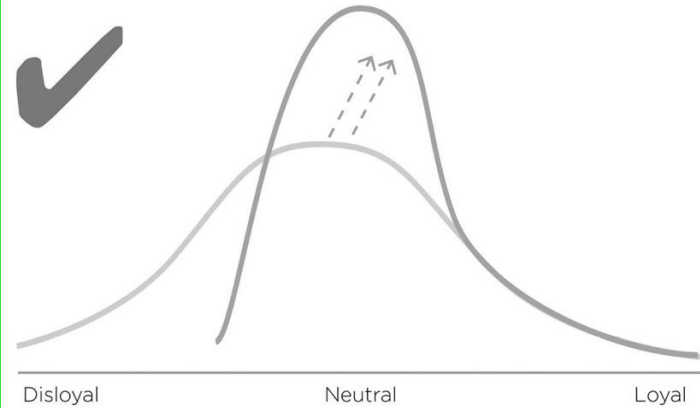
Wrong Loyalty Goal: "You exceeded my expectations."

Illustrative



Correct Loyalty Goal: "You made it easy."

Illustrative



Effortless Experiences

Websites and Apps as the ultimate branches and digital-first engagement

There are 2 ways to communicate today

Phone-First



Initiation:
Dial a Phone Number



Connection:
Phone Trees



Experience:
Verbal

Digital-First



Initiation:
Click to Message
and Talk



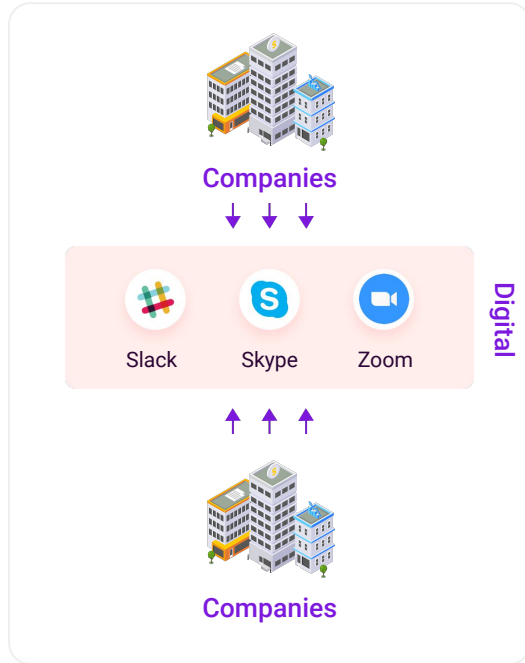
Connection:
Business Logic



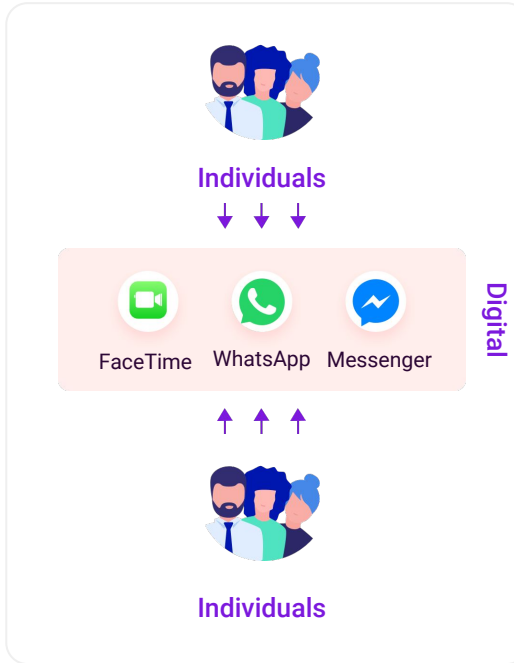
Experience:
Visual

50% of Member Communication is Still Legacy Phone

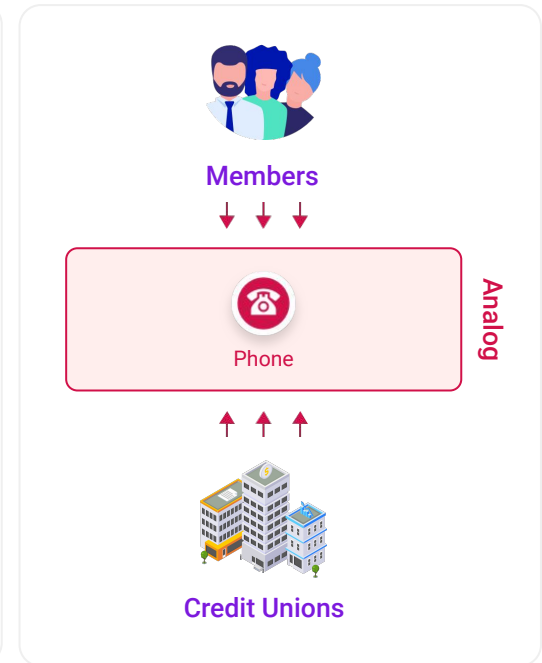
B2B Communication (Colleagues)



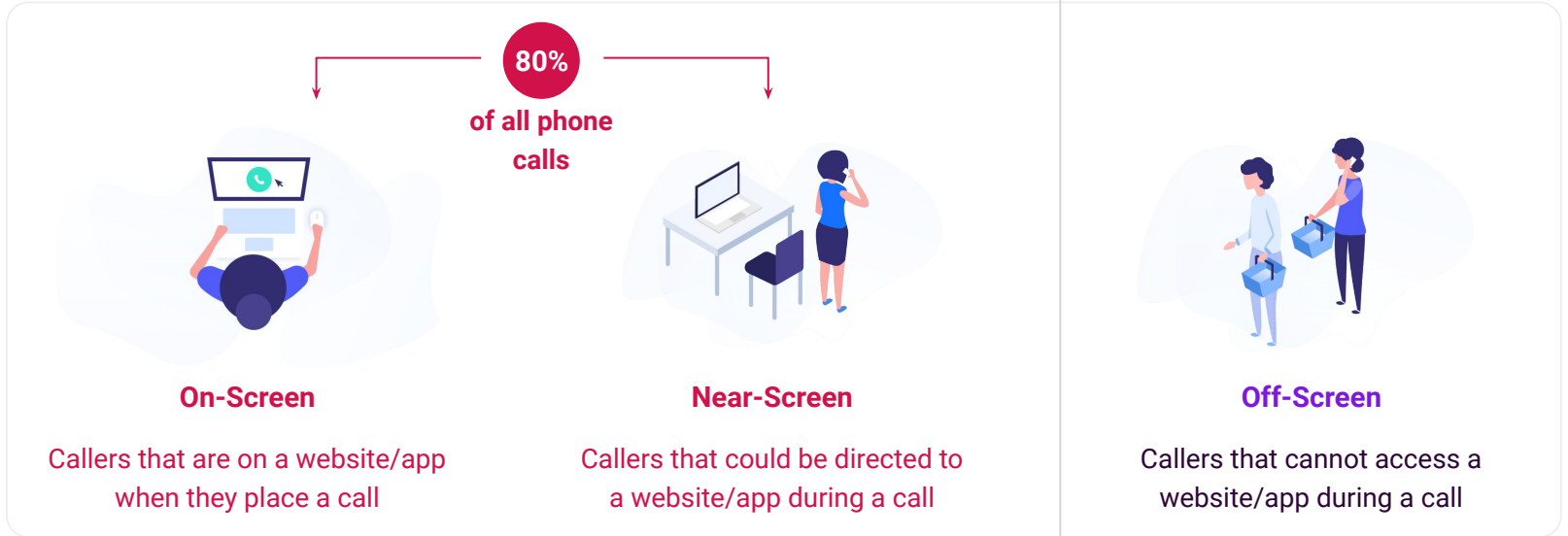
C2C Communication (Friends/Family)



B2C Communication (Members)



But Members are rarely just calling on the phone



80% of all phone calls

20% of all phone calls

...and increasing

*Glia Members and CEB, The Effortless Experience

Avoid Channel Switching



The Change Must Happen **NOW!**

1



Members are already digital with their Friends, Family and Colleagues.

2



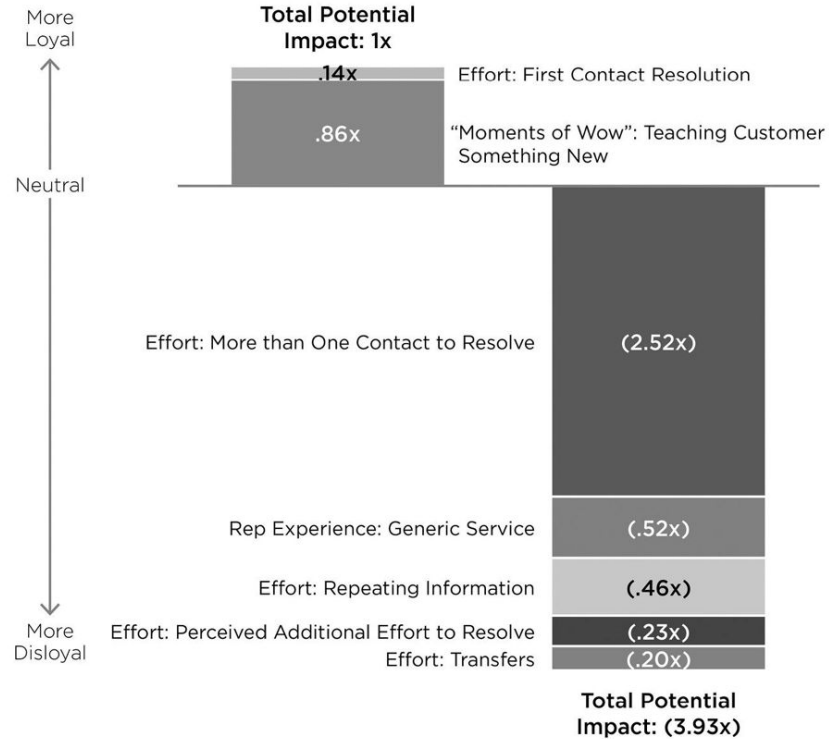
Businesses are rapidly following suit in order to meet members where they are.

3



Digital Member Service delivers Effectiveness, Efficiency and Experience (no compromises)

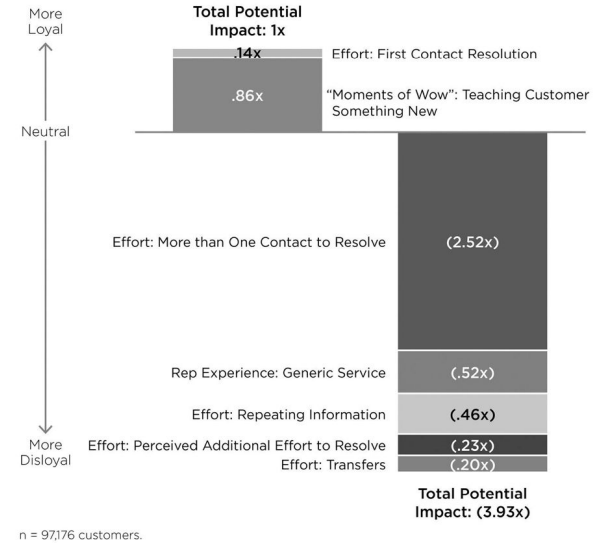
Phone-First vs. Digital-First



n = 97,176 customers.

Phone-First vs. Digital-First

Disloyalty Driver	Phone-First	Digital-First
More than 1 contact to resolve	Members must call in each time a point of friction occurs	Next issue avoidance, agent can teach member how to resolve their own issues in the future without reaching out for additional help
Generic service	Can't get on the same page, must rattle off generic FAQ type responses and hope one sticks	Connect with a specialist who knows what the member is looking for and sees the member is already authenticated
Repeating information	Without context from previous agent, member is forced to repeat their issue over and over	Members can be transferred seamlessly between agents while member information is stored and transferred to new agents have context going into the interaction
Perceived additional effort to resolve	Without next issue avoidance or live observation, member never learns how to work through their inquiry, making additional future engagements seem tedious and difficult	Next issue avoidance eliminates the perceived effort needed to solve an inquiry
Transfers	Placed on hold and forced to repeat themselves over and over again	Simple, seamless, low effort





- **Key Takeaways**

Key Takeaways



Member Effort

Effort needed to solve a problem or obtain service online



Effortless Experiences

Digital Disloyalty Digital-First Communication On Screen + Near Screen Calls



Loyalty

Members willing to expand upon:

Wallet share - how much members are spending?

Repeat business - are they coming back?

Member Advocacy - are they recommending your business?



Member Effort Score

“The new metric” which impacts:

Member Loyalty - are your members sticking around?

Member Experience - are your members happy post engagement?

Member Expansion- are you members increasing their wallet share?

The background features a dark purple color with a pattern of fine, concentric, wavy lines. Scattered throughout are several abstract, rounded purple shapes and a few small dots.

Thank You!

Contact Us: Justin@glia.com
www.glia.com