

CASE STUDY

Generic video conferencing versus 24sessions

How a major European Retail Bank, Wealth Management provider and blue chip insurer successfully digitized in-person services with video technology built for Customer Contact.



24SESSIONS

The platform for video-first
Customer Engagement

www.24sessions.com >



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Challenge | Seamless & compliant digital Customer Experience

In today's market, providing a seamless Customer Experience is a powerful competitive differentiator - amidst climbing costs, shrinking margins and customers demanding convenience.

Where most companies compete on price or product, our most successful customers focus on surpassing their competitors through an exceptional online Customer Experience - with live video calling.

3 customers of 24sessions - in retail banking, wealth management and insurance - were looking to add a new digital channel to their existing customer contact. They wanted to provide a more personal Customer Experience than via email, chat or phone, but through a more (cost-) efficient channel than face-to-face.

To add video calling to their omnichannel mix, our customers first decided to **pilot a generic video call solution** - either Zoom or Microsoft Teams.

However - although video calling produced some gains in Customer Experience at first - when our clients wanted to scale Video Customer Contact, neither Zoom nor Teams could meet the requirements for **different meeting types and configurations** which scaling-up asked for - such as meeting templating, differing compliance settings and embedding video calls in existing IT.

In other words, our 3 clients discovered the **shortcomings** of using generic video call solutions for offering multiple video call services to customers **at scale**.



5 risks of using generic video conferencing for Customer Contact

Video conferencing software like Teams and Zoom **hasn't been developed for 1-on-1 contact** with customers. That's why it fails to offer the specific capabilities required for Customer Engagement.

1

Sub-optimal security [v](#)

Branding | Custom domain | Separate access client - advisor | Embedded

2

No meeting templating for compliance [v](#)

Separate meeting types | Configurations | Data storage | Recordings on/off

3

No customizable Customer Journeys [v](#)

Different customer journeys | Web-based | Mobile-optimized

4

Limited integrations with existing IT suites [v](#)

Embedded booking | Routing | CRM & Contact Center integrations

5

No segmented data per meeting type [v](#)

Video call data on quality & CSAT | Dynamic dashboard | Segments | Data API



“When we piloted Teams and other solutions for customer contact, they didn't pass the risk assessment. 24sessions was the only solution to meet our security standards.”

Large European Retail Bank about piloting Microsoft Teams for mortgage advice

Risk #1 Insecure video calls

Generic video call solutions are built for internal collaboration and do not prioritise specific **security requirements** for customer contact. Microsoft Teams for example, only upgraded to **end-to-end encryption** in the spring of 2021. When our client in Retail Banking set up a risk assessment for Teams, it did not pass the test.

“During one of our customer meetings in Teams, 2 customers who didn’t know each other ended up in the same Teams call. An unacceptable security risk.”

Large European Retail Bank piloting Microsoft Teams

Security risks in Zoom & Teams

1. Not built for customer contact

Teams and Zoom are tools built for internal collaboration, not for Customer Contact. That means they have **no priority on must-have security features** for customer contact like end-to-end encryption.

2. No separate link client - advisor

Teams generates **one and the same link** for both the advisor and the customer to join a video call. Also, the meeting link doesn't expire. This means that once an advisor has shared their meeting link, a customer could re-share it, and **anyone could re-use it** posing as an advisor from your company.

For secure customer contact, the agent's and the customer's link should be **unique** and the video call link should **expire**.

3. No custom domain

Zoom or Teams meetings take place in their application, with their logo, on their domain (URL). That means **anyone with a Teams or Zoom account** could send your customers **phishing links** posing as you.

Neither Teams nor Zoom offer customisation to add your own branding and create a **trusted environment** for end customers. While for customer contact, video calls should happen on your **custom domain** to ensure customers that they're talking to one of your verified advisors.

4. No unique meeting link

Teams and Zoom offer agent rooms with **static meeting links** that can be reused. This can lead to 2 customers ending up in the same call, or hackers gaining access to such a static link. For customer contact, only **one-time, expiring links** should be used.

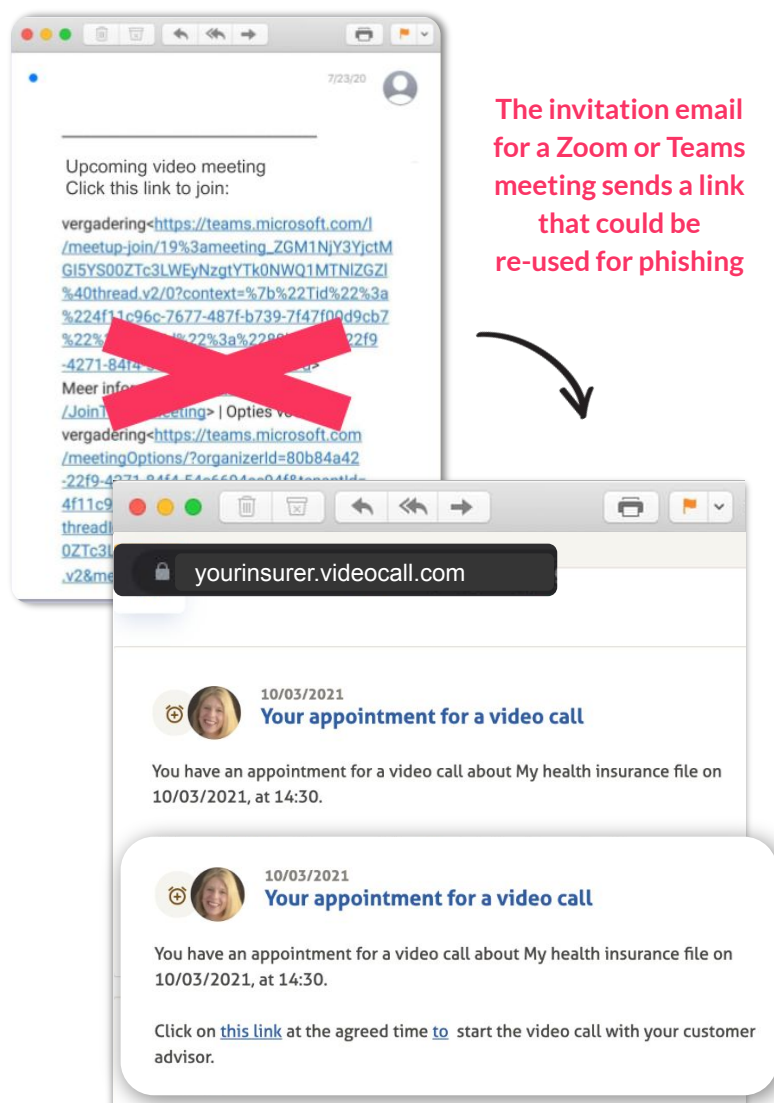
Insecure video calls: solution

Solution: 24sessions' technology for Customer Engagement

Instead of having customers enter a video call in an unbranded, untrusted-looking environment, 24sessions allows you to **customise** the video call experience for customers. Our technology hosts video calls **on a custom domain**, where organisations can add their **own logo**.

Our technology always generates a **secure link for each video call**, which is unique, expires after a set time, and is different for the advisor and the client.

Some of our clients also choose to fully **embed** video calling in the Customer Journey, i.e. in a mobile app or client portal behind a login wall. Such an embedded journey creates a 100% branded and trusted experience, like the example to the right 🙌



Specialist technology for Customer Engagement always creates a **secure, unique link** and allows for video calls to take place on a **custom domain** for a branded, trusted experience

Risk #2 No meeting templating to configure for compliance

Generic video call solutions do not offer meeting templating. It is not possible to create **separate meeting types** with their own **configurations** in Zoom or Teams. That leads to generic solutions failing to meet compliance standards.

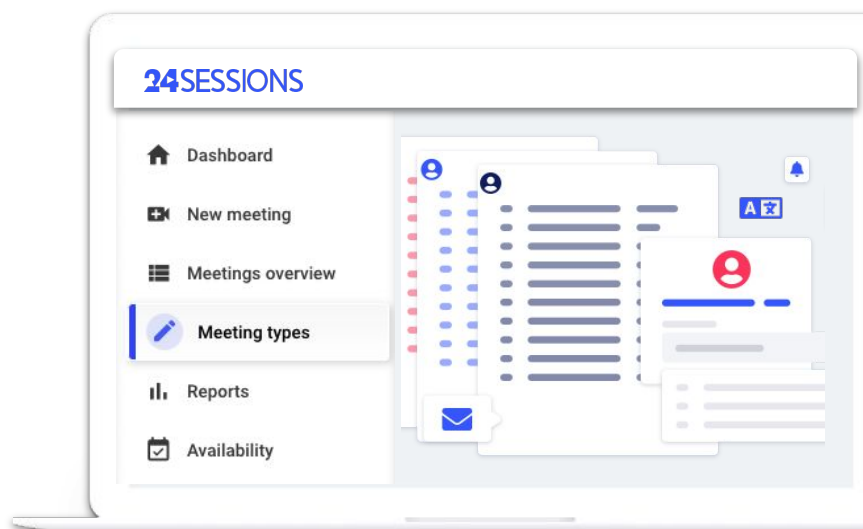
For example, our client in Banking is legally required to record Investment conversations, but also be prudent with recordings of other customer conversations due to GDPR.

With Teams or Zoom **either all/no meetings are recorded** (a setting at user-level, not per meeting type), or advisors have to **turn on recordings manually** for each video call. Such inconfigurability at the meeting-type level causes incompliance - either with GDPR or MiFIDII. Customer contact requires a solution where compliance workflows can be configured per meeting type.

Teams' shortcomings for compliance

Generic video conferencing tools put our clients' **compliance at risk**, because they offered no configurations on whether/not to record video calls.

There was also no way to **configure other settings** according to the type of customer meeting or the region a customer was in - like storage options for **how or when to store data** of video calls, or what integrations to enable for which meeting type.



“Our advisors perform 2 types of meetings with clients. One type of meeting has to be recorded for compliance reasons, the other absolutely cannot be recorded. That distinction proved to be impossible to configure in Teams.”

24sessions' customer in Wealth Management has video calling deployed for 2 types of client conversations



No meeting templating: solution

Solution 24sessions: configurations per meeting type

Instead of enabling only generic settings for all video calls, a specialist video call solution for customer contact like 24sessions is **highly configurable**.

24sessions allows organisations to create separate **meeting templates** based on the different types of conversations with clients. Each video call is configured with the **right settings for that specific meeting type**. Such tailored configurations ensure that every video call journey fits our clients' business processes and regulations.

For every type of video call, 24sessions clients can configure and enable / disable settings in:

- agent access
- meeting duration
- **branding**
- customer communication and messaging
- **waiting room**
- language
- booking form fields
- review questions
- **recordings and storage** (in-cloud or on-premise)
- compliance & privacy

Highly configurable to fit any workflow



Meeting templating



Agent authorization, groups and roles



Booking & routing



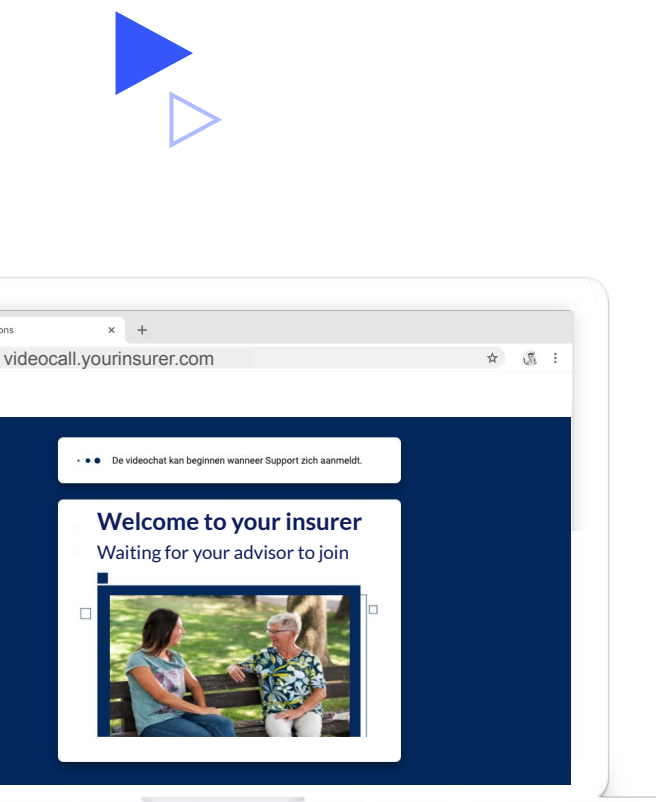
Email/SMS reminder flows



Store recordings in cloud or on-prem



Custom settings per meeting type



Risk #3 No customizable Customer Journeys

By not distinguishing between different meeting types, generic video conferencing software also **can't be customized** to create a smooth Customer Journey for each service our customers offer via video calling.

Solutions like Teams or Zoom allow **only 1 generic journey** to schedule, start or join a video call - for both the agent or advisor and the customer.

Teams' limited Customization

By not offering meeting templating Teams and Zoom also **didn't allow our customers to configure settings** for booking forms, routing, availability and duration for different meeting types, or for email & SMS communication to end customers.

1 No branding & configurations

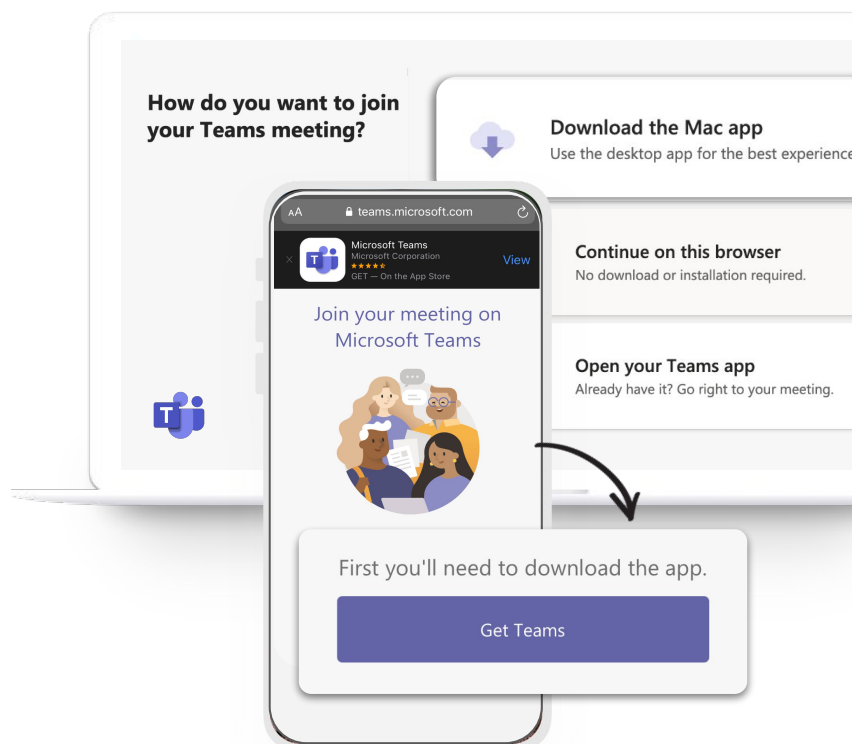
No way to customize the customer journey to create a trusted environment with your own logo, colours and custom domain.

2 Not optimized for mobile

Not being browser-based, Teams and Zoom do not work on a mobile browser, but **only with the app** for mobile.

"We were looking for strong customization options, and we didn't want our customers to **install any application for a video call with their mortgage advisor."**

Large Retail Bank after deploying 24sessions for mortgage advice via video



3 Not web-based: requires an application

Teams and Zoom require users to install an app to have a video call. Not being web-based, they will always offer a **lesser experience in the browser**, e.g. without features like background blurring.

No customizable Customer Journeys: solution

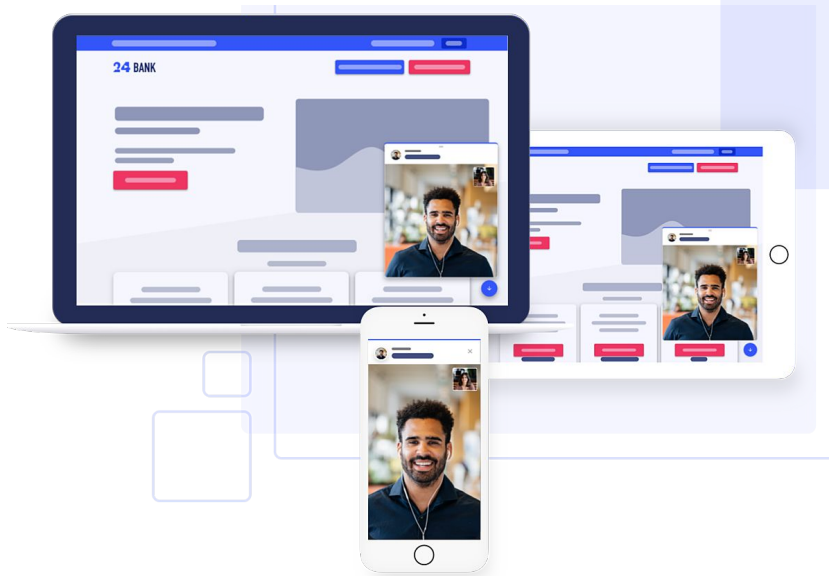
Solution 24sessions: customizable and embeddable

Instead of requiring customers to install an application and only offering limited embedding of video calling in the customer journey, 24sessions offers the flexibility of **web-based** technology built for Customer Engagement.

Customers can start video call journeys from any touchpoint - also on mobile.

A 24sessions video call:

- Works with **1 click on a link** - in the browser, with no downloads
- Offers **integrated booking** of a video call on your website, app or client portal. Our booking module is not a premium add-on, but **available to all users**. It also offers a calendar integration for **smart routing**
- 24sessions can be fully embedded on all platforms, enriched with instant video calls, screen sharing or co-browsing
- Thanks to our rich embedding options, 24sessions clients fit video calling into any customer journey and workflow - making it **easy for customers as well as advisors** to start a video call.



“We wanted to roll out video customer contact in a **scalable way, so that first-line agents could escalate a complex question by booking a video call with a more specialist advisor for the customer. But Teams only allows users to schedule a video call **for themselves**.”**



Blue chip insurer using video calls for service & advice on health insurance

Risk #4 Limited options to integrate with existing IT suites

Embedding and integrating video calls doesn't only bring benefits to the Customer Journey. Our clients also find it valuable to integrate Video Customer Contact with their [existing CRM](#) or [Contact Center suite](#).

However, generic video conferencing solutions offer limited integration options.

Solution 24sessions: leading integrations & flexible API

Instead of requiring clients to build a video call integration with their Customer Engagement or data suites themselves, 24sessions offers [ready-to-use integrations](#) - both with leading Customer Engagement software and through our [flexible API](#).

Benefits of the strong integrations of technology made for Customer Contact:

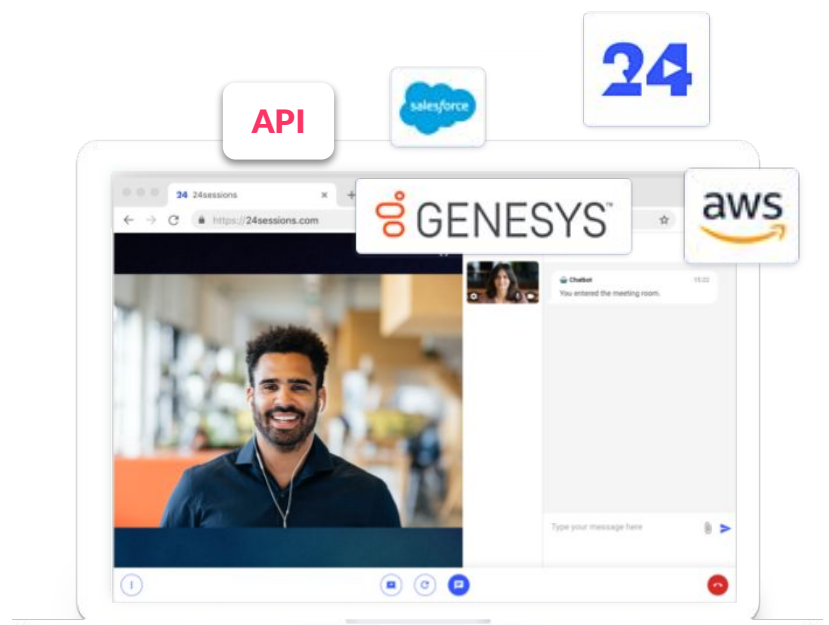
- ✓ Ensure [compliant](#) internal workflows
- ✓ Create easy-to-use, [efficient workflows](#) to enhance user adoption
- ✓ Generate [relevant insights](#) for Business Intelligence

Limited integration options

X No default integrations in the Customer Journey
Neither Microsoft Teams nor Zoom comes with a **default appointment booking module** to embed in a website or app. Microsoft [Bookings](#) is only available for Business users of Office 365. [Zoom](#) has standard integrations with major CRM systems for business users, but doesn't offer Customer Experience integrations like a booking form.

X With no calendar integrations, generic solutions fail to offer [smart routing](#) based on meeting types and availability.

X To create a customized, embedded Video Journey, the only solution is to [build it yourself](#).



Risk #5 No segmented data per meeting type

Generic video call solutions fail to generate **segmented data insights** for every type of client meeting.

Most generic solutions can be connected to your Business Intelligence solution. However, they don't offer meeting types and **lack meaningful data points** around customer interactions (like reviews, input from booking forms) - making it practically **impossible to get actionable insights** on video calling out of Zoom or Teams.

Solution 24sessions: custom data & dynamic dashboarding

Instead of requiring users to build their own data dashboard to track video call performance (or not tracking any data on video calls at all), 24sessions generates custom data in a **dynamic dashboard** or a **data integration** with our API.

Track data on:

- Your own KPIs with custom review questions, like **NPS or CSAT**
- Meeting duration
- **Agent performance**
- Goal completion with AI

✓ **All data can be segmented** per type of meeting / user / team (group of advisors) / time range

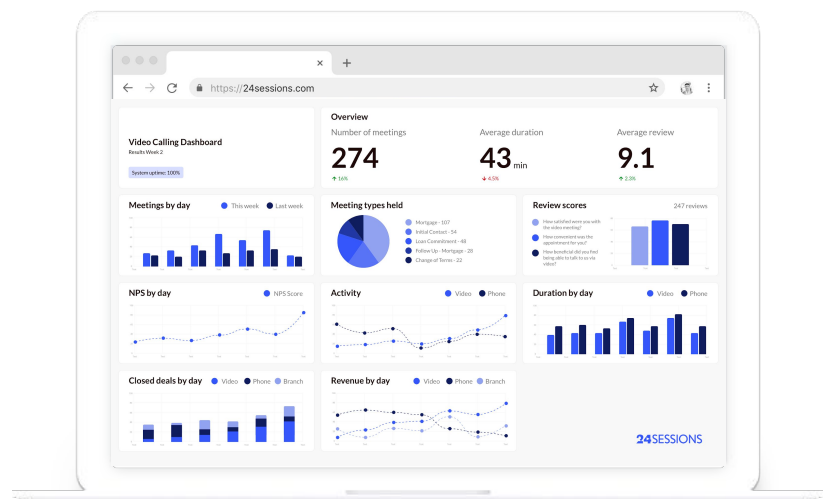
Shortcomings for segmented data

Generic solutions don't allow you to **segment data** based on meeting type / user / team / time.

Plus, neither Zoom nor Teams offers a **standard data integration** drilling down on video meetings.

✗ To generate insights on your video calls with customers, you have to **build a data dashboard or integration yourself** in Power BI / Dynamics.

✗ Not being able to segment data on video calling specifically makes it **hard to collect & analyse video insights in one single overview**, and generate actionable business insights on improving Video Customer Contact.



- ✓ **Keep track of data real-time** in your own dynamic dashboard
- ✓ **Integrate with your own BI tooling** via our API to maintain 1 central data overview & easily share insights with the business



No expert services to successfully scale video contact

Last but not least, our customers were slowed down in rolling out video calling while piloting generic video solutions by not having access to **expert services**.

Neither Teams nor Zoom offers business customers tailored services to help **implement and integrate** a new video solution, or to **onboard** employees on how to use video calling for customer contact.

Solution 24sessions: Customer Success Team

As a solution specialising in customer engagement, 24sessions offers a Customer Success program.

Our Customer Team acts as a **key differentiator** for clients to:

- successfully **launch** video customer contact
- and make video a **scalable channel** for customer contact

“As a bank, we had absolutely **no knowledge about video calling. With Teams, without any support, we would never have succeeded in scaling video. 24sessions’ strong point is the **expert guidance of the Customer Team**.”**

Our client in Wealth Management who moved from Microsoft Teams to 24sessions



Business impact = Adoption X Performance

The basis for creating long-term success with video calling: the Growth Model that the 24sessions’ Customer Team develops with each client



01
STRATEGY &
PLANNING



02
ONBOARDING



03
BUSINESS
VALUE



04
SCALING



05
OPTIMIZE

Conclusion

“Our [working processes](#) have been optimized a lot - 24sessions is a major [time-saver](#).”

Blue chip health insurer who moved from Microsoft Teams to 24sessions

After piloting Zoom’s and Teams’ generic video call solutions with only medium success, our 3 customers started looking for a more [specialised solution](#) - offering the right capabilities to make video calling journeys [compliant](#), [configurable](#), [integratable](#) and [scalable](#).

Our clients’ needs for compliance, configurable journeys, integrability and scalability were met by 24sessions’ [secure suite for video Customer Engagement](#), and by the [expert services](#) of our Customer Success Team.

5 key capabilities of technology for Video Customer Contact

Capabilities	Features
1 Build a customer journey for each service	• MOBILE • 1CLICK • ROUTING
2 Ensure compliance across meeting types	• RECORDING • REGIONS • AUTHENTICATION
3 Generate and segment relevant data at scale	• CSAT • PERFORMANCE
4 Connect to existing customer engagement suite	• CRM • CONTACT CENTER
5 Create a trusted environment	• CUSTOM DOMAIN • BRANDED • EMBEDDED

24SESSIONS

A **MessageBird** company



About us

Bring the human back into your digital service. 24sessions is the video-first platform for customer engagement. We offer [premium technology](#) for every step of the digital customer journey - with integrated booking, secure video calls, co-browsing, smart recordings and AI meeting insights. So enterprise service providers in Banking, eCommerce and Utilities can engage with customers personally across channels.