



# VISUAL ASSISTANCE

AND THE Return to Work

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*Best practices for using augmented reality  
visual assistance in a post COVID-19 world*



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## A LETTER FROM THE CEO

When I founded SightCall in 2008, I envisioned a future where live video could be used strategically by businesses for more than face-to-face interaction. Inspired by the communication boom of video apps like Skype, my business partner and I created the roadmap for early visual assistance platform that would use an open cloud to integrate into organizational workflows and business intelligence systems with ease.

**The time is right for organizations to implement new solutions that will unlock the true potential of their employees** ”

This year we have seen the power of remote visual communication to not only ensure business continuity, but also to protect the health and safety of workers around the world. Even the most technologically conservative companies have begun the process of digital transformation to ensure business continuity and service operations.

Today augmented reality visual support sits at the intersection of the physical and digital worlds. As such, the time is right for organizations to implement new solutions that will unlock the true potential of their employees and meet business goals. With smart phones in the hands of an estimated 2.5 billion people<sup>1</sup>, the vehicles for deploying remote support are already in the field, and it is now up to enterprises to put the key in the ignition.



– **Thomas Cottereau**  
SightCall CEO

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# INTRODUCTION

## THE FUTURE OF SERVICE IS REMOTE

Every business has one thing in common in 2020: the desire to sustain and remain profitable in spite of the pandemic. Many companies have struggled to align their people, processes and technology to achieve these goals.

2020 has been a year of rapid change for field service and customer service organizations. Over the last several months we have watched service leaders quickly adopt new technologies to minimize service disruptions, maintain operations, and prioritize employee and customer safety and satisfaction.

Moving forward, it will be impossible for service organizations to return to their old ways of doing business. The “new normal” requires digital transformation and the adoption of remote work to ensure business survival.

**In this e-book you'll learn how AR visual assistance can:**

- Ensure business continuity through digital transformation
- Safeguard your employees and give customers peace of mind
- Improve ROI by reducing costly truck rolls and parts wastage

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# What is Visual Assistance?

01

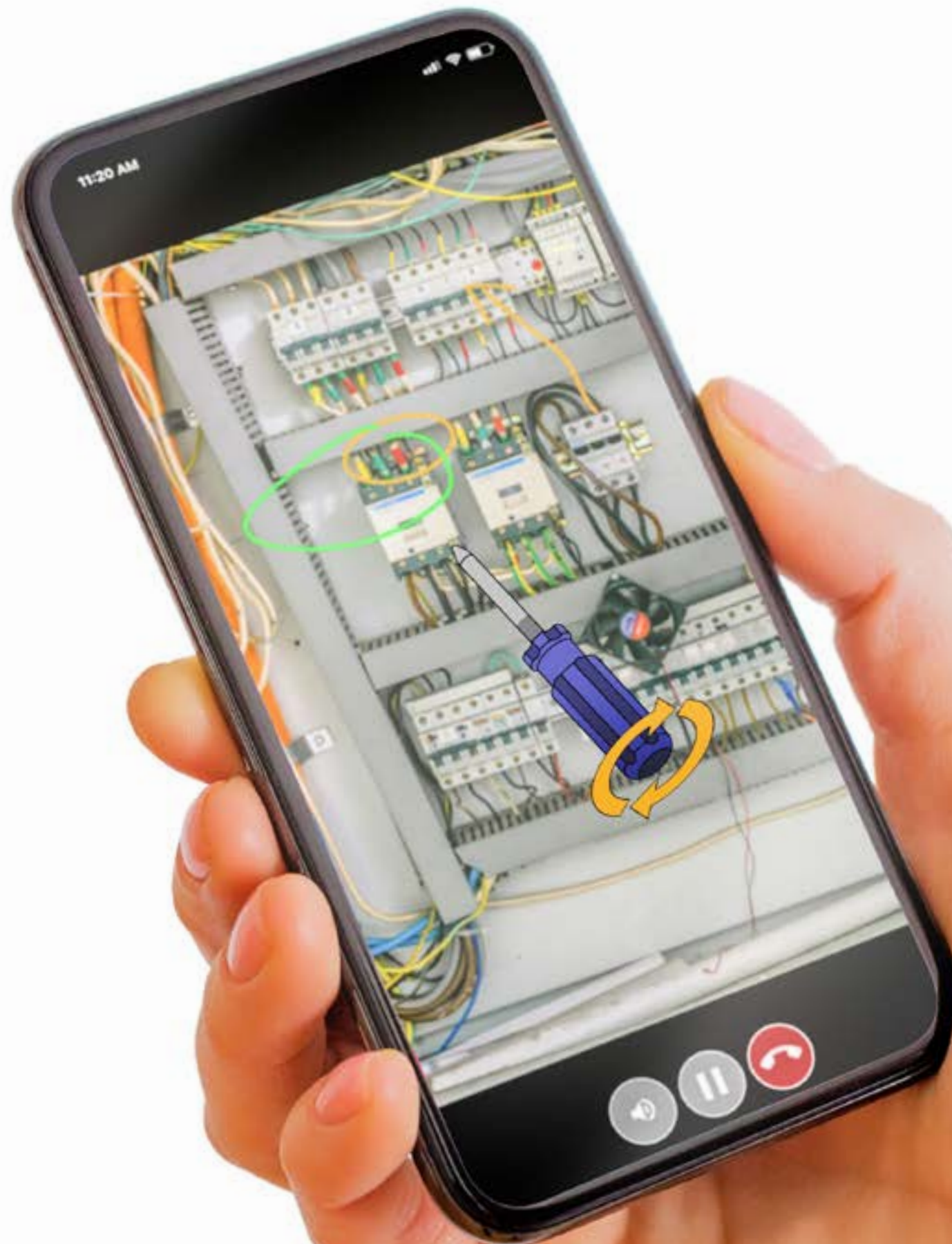


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## WHAT IS VISUAL ASSISTANCE?

Visual assistance is a solution that enables experts to provide remote service support to technicians and customers. Through live rich communications, the expert uses a variety of tools including voice, text, document share, augmented reality, and artificial intelligence to convey important instructions to the person they are assisting.

Prior to COVID-19, visual assistance was an emerging technology used by early adopters to improve customer service, reduce costs, and scale service operations. Now visual assistance has gained significant momentum as the need for remote support has become critical for business continuity and service.

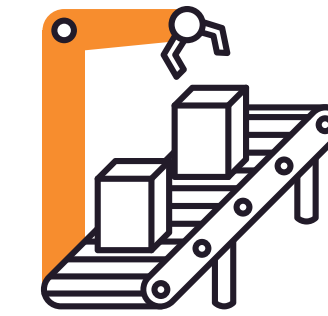


## HOW IS VISUAL ASSISTANCE APPLIED?

Visual Assistance improves the service experience and time to problem resolution by augmenting tasks with visual technology to improve efficiencies.

Tasks that previously required onsite visits are converted to live video experiences that can have a multitude of benefits including replacing onsite visits, reducing onsite visits and reducing wastage or product returns.

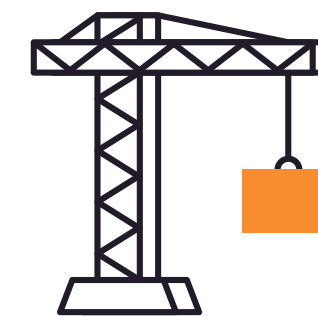
### Industries Succeeding In Remote Work



MANUFACTURING



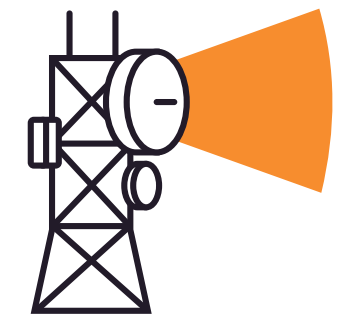
TRANSPORTATION



CONSTRUCTION



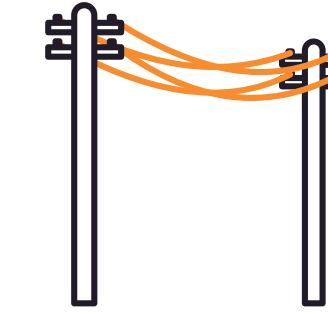
INSURANCE



TELECOM



LIFE SCIENCES &  
MEDICAL DEVICES



POWER &  
UTILITIES

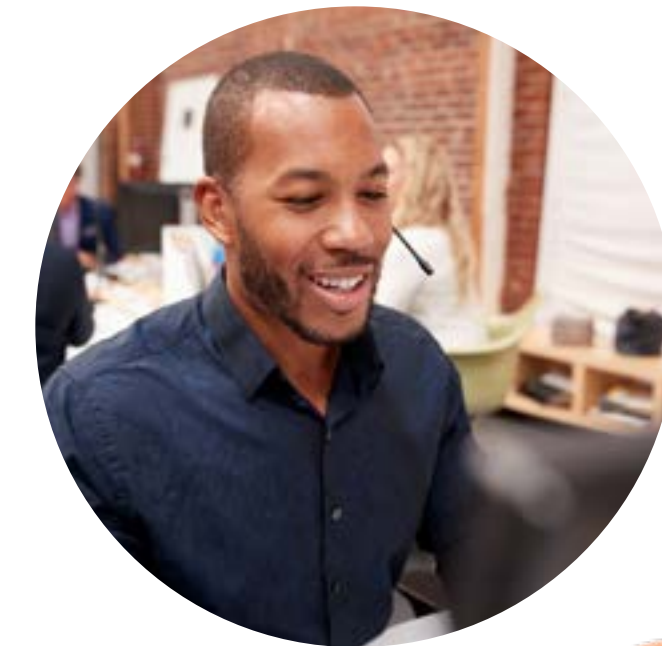
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# VISUAL ASSISTANCE FOR FIELD SERVICE

The rapid evolution of technology has made the role of a service technician more complex than before. With visual assistance, companies connect technicians in a virtual and interactive environment where they can see and share valuable information for faster problem resolution.

- Reduce truck rolls
- Improve first time fix rates
- Empower technicians
- Retain organized knowledge

Help Desk Expert



Experienced Field Technician





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# VISUAL ASSISTANCE FOR CUSTOMER SERVICE

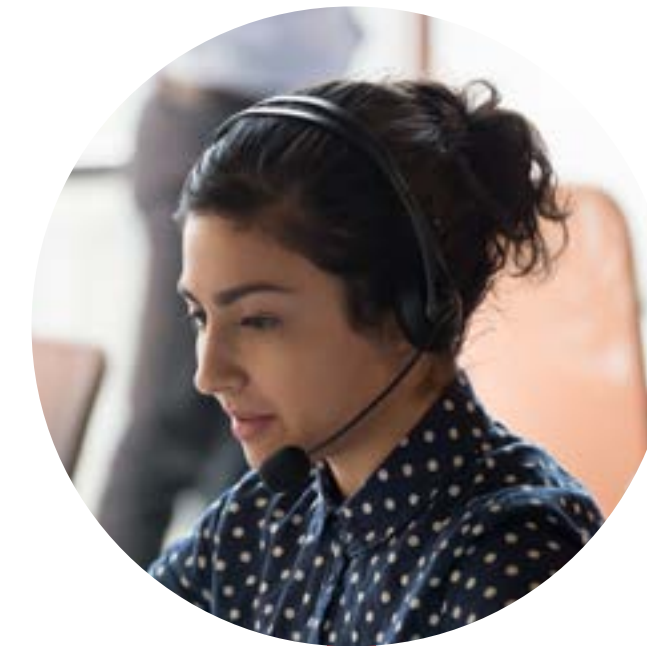
Helping customers with real-time video assistance is one way to turn your contact center from a complaints department to a solutions department. Escalate customer conversations to visual support and empower agents to see and resolve customer issues in real time.

- Prevent unnecessary onsite visits
- Improve Net Promoter Score (NPS)
- Reduce product returns
- Differentiate your service department

Field Technician



Customer Service Agent



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# HOW DOES VISUAL ASSISTANCE IMPACT THE RETURN TO WORK?

## 1 Reduce Technicians in the Field

Now, more than ever, companies must consider which truck rolls are essential. The right visual support tool can reduce trips to the field by half. When a technician can see the problem before going onsite, they are more likely to: identify if the issue is simple user error; determine if the issue can be fixed through remote guidance; determine exactly what parts will be needed to resolve the issue; or decide if the issue requires a product replacement rather than fix. [See how Koenig & Bauer uses SightCall to improve fix rates](#) and help their customers resolve complex issues remotely.

## 2 Improve Uptime For Essential Equipment

Due to travel bans and quarantine, it is not always possible to send the most qualified technician out in the field. Visual assistance empowers a remote expert to guide an onsite technician through a complex repair process. SightCall provides a robust suite of tools in a collaborative digital environment that allows two technicians to interact as if they were in the same location. Features like Augmented Reality (AR) annotations, live pointer and document share make it easy for technicians to work in harmony and fix problems as a team. [See how GE Healthcare uses SightCall to keep mission-critical medical devices online](#) with remote visual assistance.

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### 3 Reduce Person-to-Person Contact

Some service requests do not require a trained expert to be deployed to the field. There are tasks that can be guided and performed by a person onsite, even if that person is not an employee of your company. Cable providers can rely on customers to help them see if a modem needs a reset or a total replacement. Insurers are able to expedite their claims process from weeks to days by handling claims remotely with customers. Retailers can walk customers through user errors reducing the need for product returns or onsite visits. SightCall empowers your support team to see the issue and provide a diagnosis in real-time.



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## 4 Improve Technician Training

Hands-on training is the best way to get technicians ahead of the learning curve. It provides them with the ability to experience challenges directly and respond to them with confidence. However, it's not always possible to train for every issue that will be encountered in the field. Using remote visual assistance you can connect the onsite technician with experience experts who walk the technician through the issue on-the-spot. Remote visual assistance lets your technicians get into the field faster while still taking advantage of remote mentoring.



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# Visual Assistance Playbook

# 02



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## STRATEGIZING A SUCCESSFUL RETURN TO WORK

Each company, industry and country will make their own rules on how to successfully return to work. You may also find that different branches of your organization will stagger their returns and test new models for shift management.

The following use cases are examples of how companies can/are using augmented reality visual support to create a safe work environment for employees and customers amid COVID-19 including:

- Reducing non-essential technician dispatch
- Digitally mobilizing your workforce
- Guiding customers with remote problem resolution

## USE CASE 1

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# CONTACTLESS MAINTENANCE

*Digitally transform the way you interact with customers during mandatory site visits by reducing unnecessary contact.*

**Old Scenario:** A technician would enter a home or business and interact with customers when performing an essential maintenance.

**New Scenario:** When a technician arrives onsite, they perform the maintenance without physical interaction with the customer. Using AR Visual Assistance, they have a video session with the customer to show the repair, discuss the bill or parts needed and remotely collect the customer's signature.



## Business Benefits

- Protect the safety of the customer and technician
- Reduce paper trail
- Improve customer experience

## USE CASE 2

# REMOTELY GUIDED INSTALLATION

*Let customers handle simple installations with the option of remote expert guidance.*

**Old Scenario:** A technician would come to a customer's home or business to install a new product (i.e. cable box, smart device)

**New Scenario:** The product is shipped directly to the customer for self-installation. At a scheduled time, they have a SightCall session with a technical expert that uses AR-powered visual assistance to walk them through the installation.

## Business Benefits

- Reduce unnecessary truck rolls
- Help customers quickly and efficiently
- Increase technician efficiency by reducing time in the field



## Key Features

- *Annotate on screen to provide visual guidance*
- *Share relevant product documentation*
- *Co-browse to share web resources*



## USE CASE 3

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# VISUAL CUSTOMER SUPPORT

*Help customers solve their problems quickly while respecting their safety through social distancing.*

**Old Scenario:** A customer encounters a technical issue with a device in their home. They need to come into the store for support or wait two weeks for a technician to visit their home.

**New Scenario:** While the customer is troubleshooting online, they begin a chat session with the supplier. The chatbot escalates the conversation to a visual support session and the customer is put in touch with a remote product expert that can see the issue through the customer's mobile device. The expert uses Augmented Reality to guide the customer step-by-step through the proper configuration of their device.



SightCall enables us to provide a superior customer experience. With live video, we can diagnose and resolve cases with new clarity and precision, resolving customer issues on the first call. <sup>2</sup>

– **Daniel Murray**, Sales Director for  
Core Health & Fitness

## Business Benefits

- Reduce product returns
- Improve customer satisfaction
- Empower helpdesk agents to assist in repairs

## KNOWLEDGE MANAGEMENT

*Educate technicians quickly and share organizational knowledge in a safe, virtual learning environment.*

**Old Scenario:** New technicians are trained over long periods of time and knowledge is passed down through trainings and word of mouth.

**New Scenario:** New technicians receive remote training by experts in an apprentice-style virtual environment. As the new technician performs a task, they are guided remotely by the expert that can use a rich feature set including augmented reality annotations to explain precisely how to complete the repair. Videos, transcripts and associated data from each session are saved to the case file to improve company knowledge and create a database of knowledge for future technicians.

“Industrial safety company Fike Corporation and its employees responded with resilience to the pandemic, which they viewed as a catalyst to implement new and better technology. Using Field Service Lightning and Salesforce partner SightCall, Fike is remotely training field technicians, increasing the size and scale of their technician workforce, and improving servicing throughput.”  
- Salesforce <sup>3</sup>

### Business Benefits

- Collect tribal knowledge
- Improve antiquated training processes
- Get new technicians in the field faster

We’ve partnered with SightCall, a virtual assistant program. We can remotely train a technician and have a master technician to walk them through a job. <sup>4</sup>

– **Chad Lowman, Technology Manager, Fike Corporation**

## USE CASE 5

# REASSIGN VULNERABLE EMPLOYEES

*Companies must consider the unique personal situations of their employees and adjust to provide a suitable work environment.*

**Old Scenario:** Employees with pre-existing health conditions needed fewer personal accommodations in their office environments.

**New Scenario:** Companies must consider whether all employees can safely return to work due. Some may be immune-compromised or caring for others in at-risk categories. These employees can be reassigned to remote tasks that reduce their risk of illness such as remote triage or a helpdesk to provide remote visual assistance to customers or technicians in the field.

## Business Benefits

- Create a safe and healthy work environment for all employees
- Retain institutional knowledge
- Improve morale



# VIRTUAL SITE VISITS

*Companies reduce employees in the field by using video for estimates, diagnosis and diligence.*

**Old Scenario:** Once a work order is logged, a company automatically books an initial onsite inspection to diagnose and estimate the project.

**New Scenario:** A new work order triggers an appointment for a remote inspection. Using a tool like [SightCall](#), the employee can see the work that needs to be performed. They are able to take photos, videos and remote measurements that are all saved back to the work order. The employee is able to increase their number of site visits by reducing their travel. When a technician or expert is deployed onsite, they will be prepared with the proper parts and direction to handle the work order.

Visual Support has improved customer engagement and created a more efficient use of our field services. SightCall empowers our maintenance operatives to validate work orders remotely, which gives them a clear understanding of the problem and what time and resources will be needed to fix it. Since deployment, we have increased customer satisfaction by 14% and reduced materials waste and site visits.

– Gary Barton, Evolve Field Services

## Business Benefits

- Drastically reduce costs by removing unnecessary site visits
- Increase worker efficiency
- Reduce parts wastage

**40 min**  
Inspection Times

Reduced  
to

**5 min**  
Virtual Site Visits

## USE CASE 7

# WHITE GLOVE SERVICE

*Exceed expectations with a premium tier of customer service.*

**Old Scenario:** When a customer reaches out with a product issue, they are invited to schedule a technician visit for a later date.

**New Scenario:** Every piece of equipment is deployed with a dedicated tablet for customer service and configuration. When an issue arises, the customer can find the visual support app on their device to be connected to a remote technical expert. The satisfied customer receives immediate support, on their own terms, from a qualified professional.



## Business Benefits

- Create new revenue streams
- Support extended SLAs
- Improve the customer experience

See how B. Braun uses SightCall to provide expert customer service

[LEARN MORE ->](#)

## USE CASE 8

# MOBILE TECHNICIAN COLLABORATION

*Enable field technicians to support one another through remote collaboration tools.*

**Old Scenario:** A technician is in the field and confronted with a complicated repair. They are lacking the skills to solve the repair, so they schedule another truck roll for a more experienced technician.

**New Scenario:** A technician encounters an issue in the field and is unsure about how to handle the repair. They know that their colleague Jim is an expert on this type of equipment, so they send him a request for a visual support session. Jim walks the field technician through the repair and the job is completed on the first call.

## Business Benefits

- Share tribal knowledge
- Deploy new technicians faster
- Reduce truck rolls



## USE CASE 9

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# SELF-GUIDED AR/AI TECHNICIAN EXPERIENCE

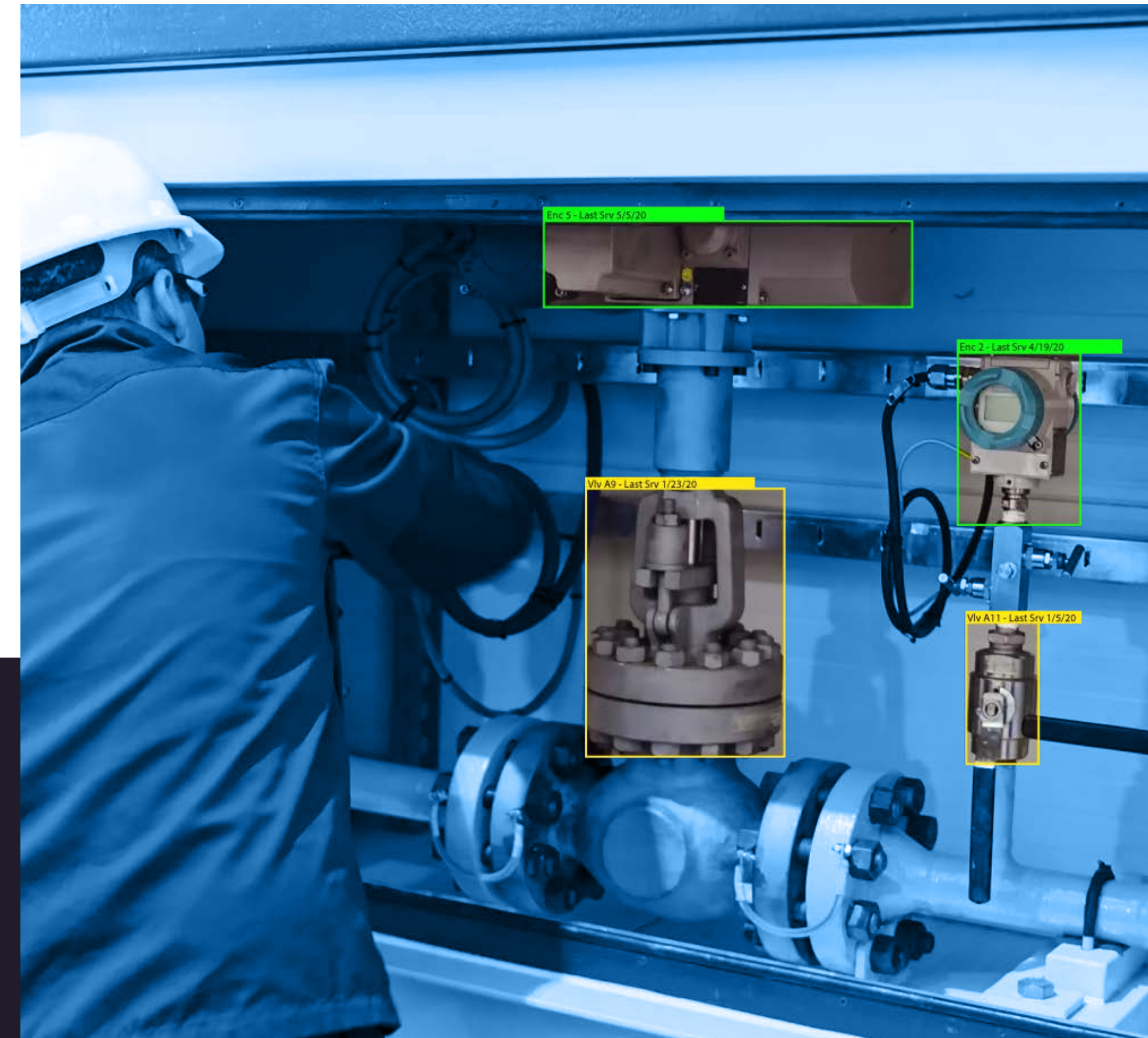
*Augment technicians with new technologies empowering them to work efficiently and autonomously.*

**Old Scenario:** When a technician is in the field they are alone to perform their tasks. If they need support, they can call a help desk or reschedule the service call.

**New Scenario:** When the technician arrives to perform their work, they use the AR and AI technologies in their field service app. Using Augmented Reality, they can pan their camera over several pieces of equipment to learn which require a maintenance and receive instructions. Using AI they can be supported in their repairs with predictive analysis.

## Business Benefits

- Improve Technician Efficiency
- Empower Technicians in the Field
- Automate Processes



# HOW WILL YOU USE VISUAL ASSISTANCE IN THE NEW NORMAL?

*Now that you've seen how companies are successfully digitally transforming through augmented reality, how will you adapt your strategy?*

## Reduce Non-Essential Technical Dispatch

- Engage Customers**  
to show the problem they are facing
- Perform Virtual Inspections**  
to diagnose the issue and identify what resources are needed
- Provide Remote Estimates**  
utilizing AR tools to view, document and even take measurements
- Reduce Product Returns**  
and Truck Rolls by determining if the issue can be resolved remotely

## Maintain Business Continuity and Productivity for the Future

- Establish Remote Support Help Centers**  
to support technicians in the field through visual assistance.
- Train Technicians On The Job**  
through apprentice style learning guided by or watching a remote expert
- Provide Safety**  
by digitally transforming to reduce contact that is unnecessary

## Rebuild Employee Productivity and Digitally Mobilize Your Workforce

- Increase Technician Performance**  
by enabling them to handle more jobs through remote support
- Return to Work with Greater Flexibility**  
by accommodating employees with remote tools
- Refocus Human Resources**  
on mission critical service jobs while completing others remotely
- Reassign Employees**  
to tasks that would reduce the risk of infection



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# Getting Started with SightCall

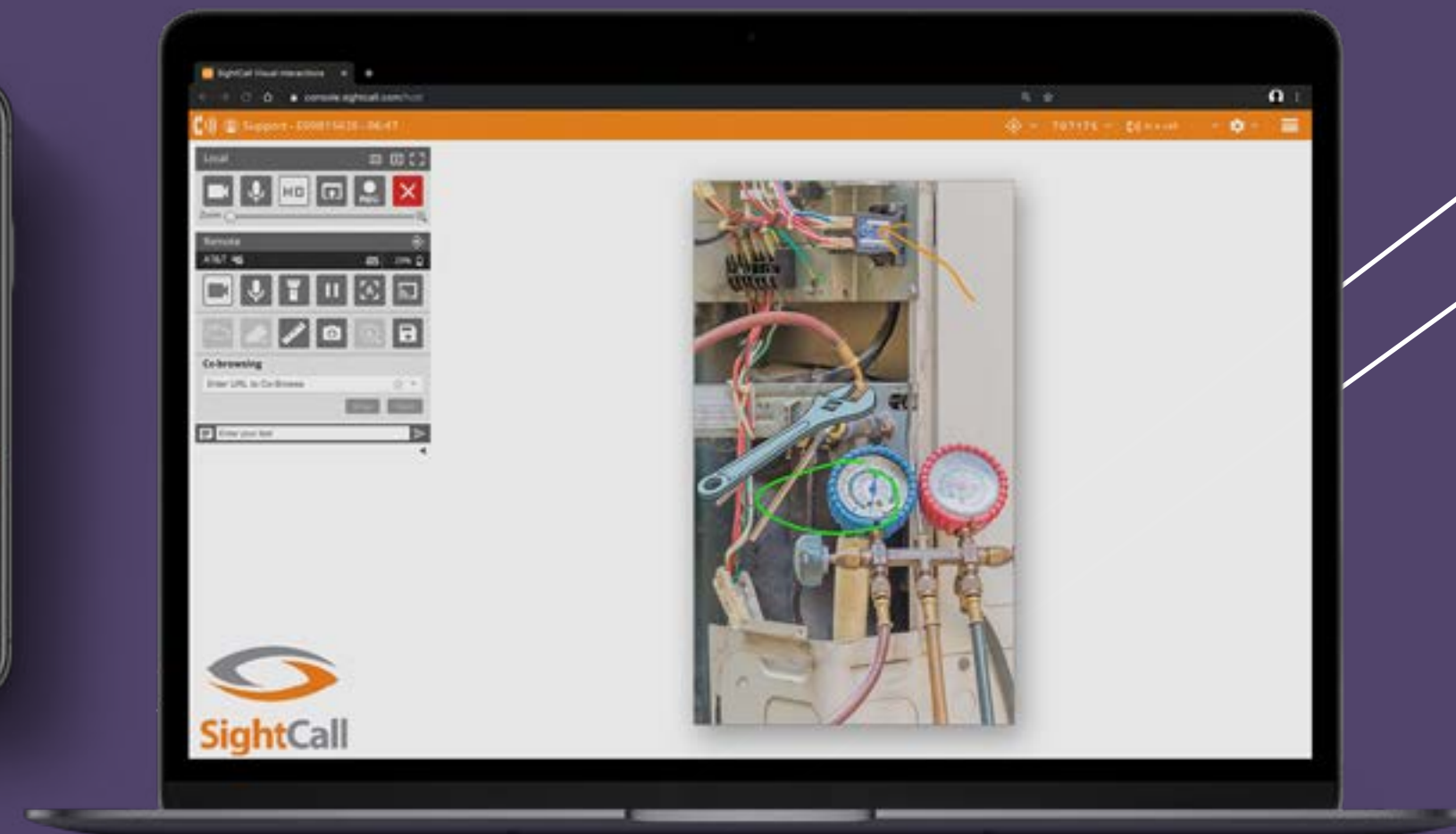
03



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## HOW SIGHTCALL CAN HELP

SightCall is an enterprise-grade video cloud platform helping service leaders improve outcomes without deploying unnecessary support to the field. Connect service experts, technicians and customers online in a safe, digital environment where they can collaborate to resolve issues quickly. SightCall enables organizations to safely execute repairs and resolve customer issues without having to go onsite.



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# WHAT SEPARATES SIGHTCALL FROM OTHER TOOLS ON THE MARKET?

While it may be tempting to use existing video collaboration tools like Facetime and Skype for business, these platforms are not built for problem solving or knowledge management. To be truly effective, your remote support tools should integrate into your processes and provide measurable ROI.

1

## **Built for Engagement**

True AR Visual Support is specifically designed to handle person-to-person interactions where an expert is delivering information to another. Other video products in the market are designed for group collaboration meaning they lack certain capabilities that are needed when dealing with technicians, customers or patients.

2

## **Secure Connections**

Most video collaboration tools are designed for anyone to enter with ease, which leaves gaps in security. SightCall delivers a targeted, encrypted meeting invite to user. No identifying data is stored on SightCall servers, and all users must accept terms and conditions for regulatory and compliance maintenance.

3

## **Process Integration**

SightCall's APIs allow for tight integration into your CRM, FSM or custom ticketing system. Quickly deploy on one of our pre-built integrations with Salesforce, ServiceMax, Zendesk, IFS, ServiceNow and more.

4

## **Strict Security Compliance**

SightCall maintains rigorous processes for the maintenance and management of our cloud platform. This includes internal and external audits for security and privacy requirements. SightCall is SOC 2 Type II Certified and GDPR, CCPA and HIPAA compliant.

5

## **Customizable Experience**

SightCall offers fully brandable apps and SDKs to allow for a completely custom brand experience. We also provide a full set of tools that can be tailored to each use case, making the agent interface simple and clean for maximum productivity.

# DEPLOY TO MEET YOUR BUSINESS NEEDS

*SightCall delivers maximum value by integrating into your existing business processes.*

- **Out of the Box**

*Deploy immediately with our classic Visual Support app. Invite any iOS or Android user to engage via SMS, email, chat or web.*

- **Pre-Built Integrations**

*Choose from an extensive list of partners for an experience that integrates into your existing workflows, tickets, and omni-channel processes.*

- **SightCall SDK**

*Integrate SightCall visual assistance into your existing branded app using our lightweight SDK.*

- **Customizations / APIs**

*Integrate SightCall into your existing workflows, share critical data between backend systems, and automate functions with powerful APIs.*

- **No App Download**

*Quickly initiate a call via web browser with no app download required.*

- **Microservices**

*Add SightCall visual assistance to your existing CRM or ticketing system for seamless workflows and unified reporting.*

# TAILOR YOUR FEATURES TO YOUR USE CASE

*SightCall offers over 30 unique features that can be assigned to different use cases making it easy to access the tools you need when you need them.*



## AI Chatbot

*Harness natural language understanding and artificial intelligence to initiate SightCall via chatbot.*



## Automatic Call Distribution

*Automatically route calls to the Agent most qualified to provide support.*



## AR Annotations

*Drop AR instructions and tools over real-world objects to provide exact instructions and reduce errors*



## Chat Over Video

*Engage in chat conversations during live video sessions to improve understanding regardless of environment.*



## Barcode and QR Scanning

*Use optical character recognition to scan barcodes, serial numbers, QR codes and relevant product information to your case file.*



## Mobile to Mobile

*Provide visual assistance from the field by initiating visual assistance from your mobile device.*



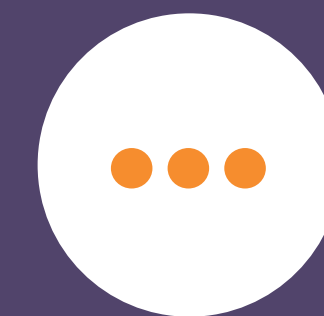
## Geolocation

*Collect the exact location of your guest to prevent fraud, ensure accuracy and remove doubt.*



## WebRTC

*Quickly initiate a call via web browser with no app download required.*



## And More

## A VIDEO PLATFORM YOU CAN TRUST

*SightCall strives to enable you with the best possible experience in visual assistance. This experience includes the safe protection and processing of customer and user data. From the inception of our company, we have maintained a high standard of compliance, security and transparency in regards to the data that is needed to provide our service, how it is used and with whom it is shared.*



GDPR Compliance



SOC 2 Type II  
Certification



CCPA Compliance



HIPAA Compliance

# — Success Stories

04



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## EE

*EE sought to innovate their customer support by empowering broadband technical experts to see inside a customer's home. With SightCall their agents could see and fix issues immediately without having to dispatch an engineer, resulting in marked NPS improvements and award-winning service.*

SightCall has really helped with our metrics. From a Network Promoter Score, we've seen some fantastic improvements. Our customers love the personal interaction and great conversations, so it's been an absolutely fantastic success story.

– **Angela Howey**, Head of Darlington Consumer & CS Helpdesk





## KOENIG & BAUER

*Manufacturing leader Koenig & Bauer solves up to 80% of service cases with remote maintenance<sup>5</sup>. Their enhanced remote service package includes Visual Press Support, powered by SightCall for Salesforce, enabling them to virtually deploy a service expert to any location in the world with AR visual assistance.*

When introduced Visual Press Support (powered by SightCall), our customers were blown away because they never have experienced such an easy, unique and simple way of communicating with our service technicians. Visual Press Support helped us to increase the first time rate and dramatically decrease the case resolution time.

– **Thomas Gocke**, Head of Digitalization & Marketing for Koenig & Bauer



## GE HEALTHCARE

*GE Healthcare strives to innovate service delivery and the overall customer experience. Using SightCall, GE Healthcare service experts are empowered to provide real-time visual assistance to remote technicians in the field. Ensuring maximum uptime for medical equipment means their customers can focus more on patient outcomes and improving lives in moments that matter.*

The partnership that we have developed with SightCall revolutionizes the way that we are able to support GE Healthcare customers in the field. By reducing medical device downtime, we are helping healthcare providers spend more time on the diagnosis, treatment and monitoring of their patients.

– **Jaco Bierman**, General Electric Healthcare, ASEAN Service Operations Manager





# SightCall



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## Reference

- 1 <https://www.pewresearch.org/global/2019/02/05/smartphone-ownership-is-growing-rapidly-around-the-world-but-not-always-equally/>
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- 5 <https://www.piworld.com/article/koenig-bauer-grows-its-proactive-customer-centric-focus-in-sheetfed-service/>