

Advanced Guidance for Jack Henry Conversations™

great service starts with getting on the same page

As an integral part of the Support Suite for Jack Henry Conversations™, Advanced Guidance (formerly Co-Browse and Video Chat & Screen Sharing) seamlessly unifies a complementary set of features, bringing branch-level expertise to digital interactions and accelerating the resolution of complex support cases.

Improve First-Contact Resolution

Accelerate resolution of complicated support cases by eliminating the back-and-forth of text-only conversations. Visual context with functions like screen sharing and co-browse allow staff to identify issues in a single interaction, streamlining workflows and lowering the overall cost-to-serve.

Seamless Continuity & Compliance

Maintain full visibility without the inconsistency of third-party tools. Not only is Advanced Guidance native to the Jack Henry Conversations™ ecosystem, but all activity is authenticated, ensuring every interaction is securely tracked for a financial institution's audit needs.

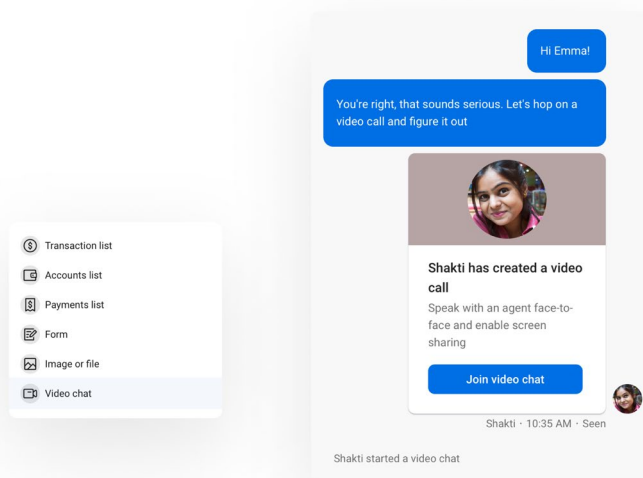


familiar features

Advanced Guidance's video chat feature provides an intuitive support experience within the Banno Digital Platform™, using features users already know well.

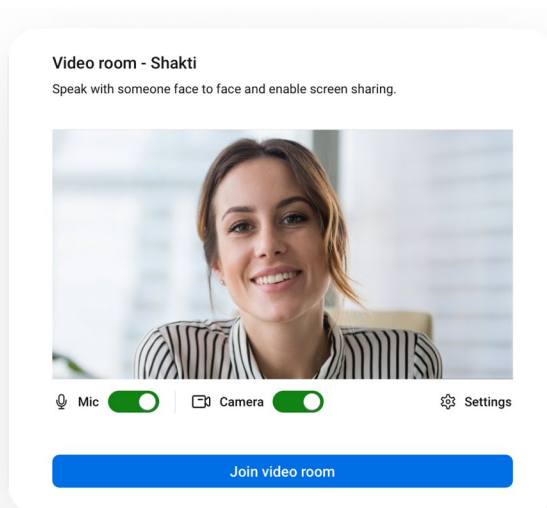
Easy Initiation

Accountholders join the secure video experience with a single action; no external links or downloads required. Let's say you're having a conversation with an accountholder but they need more assistance; simply initiate a video call with the accountholder right within Jack Henry Conversations™.



Pre-Call Check-In

The pre-call check-in allows both parties to optimize audio and video settings before the session begins, ensuring support team interactions start with a professional polish, minimizing technical friction where the focus stays entirely on resolution.



Eliminate Handoffs with Multi-User Calls

Whether an accountholder is navigating a first-time mortgage or resolving a sensitive fraud alert, the ability to quickly access specialized expertise is critical to a successful outcome. Advanced Guidance enables multi-user calls, providing the ability to loop in loan officers, mortgage specialists, or supervisors without a traditional case transfer.

Branch-Level Trust

Replicate the face-to-face rapport and expert guidance of an in-person visit virtually, with Advanced Guidance. This ensures financial institutions maintain their service standards, brand tone, and support narrative.

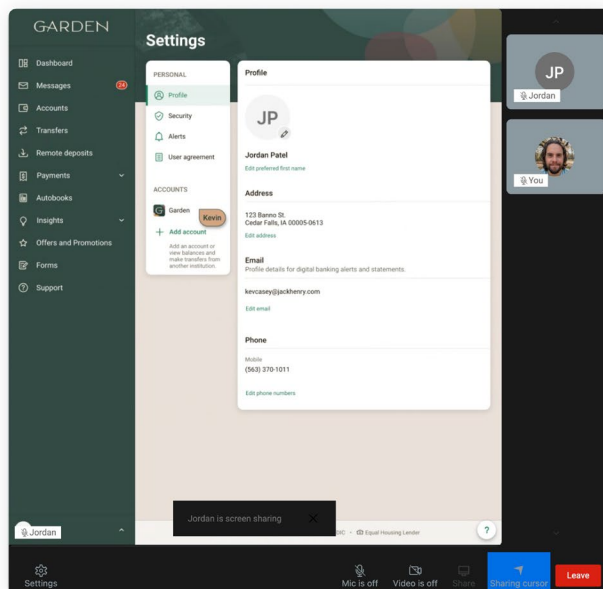
Accelerate Resolution

We all know how tricky it can be to walk through complicated support cases without visuals. Skip the confusion, and quickly reach a solution, by allowing both support teams and accountholders to share their screen during video calls. By strategically utilizing video chat and screen share, accountholders are taken through a digitally enhanced experience, fostering guided resolution every step of the way.

*Note: Screen sharing is supported in compatible desktop environments. Mobile devices and browsers can participate in a session and view a shared screen but cannot initiate screen sharing.

complement with Co-Browse

While screen sharing provides the initial visual capability, co-browsing expands upon this, allowing teams to intuitively and visually guide accountholders through tasks. Rather than describing steps or asking users to switch screens, teams can securely guide them through pages and workflows with dual-cursor support, pointing to specific fields and explaining navigation in real time.



This guided interaction is especially valuable for revenue-linked processes where precision matters, such as completing account applications or navigating disclosures. By addressing uncertainty at its peak, financial institutions help users complete time-sensitive actions they might otherwise abandon.

institutional oversight

As digital case capacity grows, financial institutions need certainty that high-touch service remains controlled and auditable. Advanced Guidance is native to Banno™, not a third-party add-on. This allows financial institutions to maintain operational standards across every visual interaction, ensuring "human-led" service is fully contained in an environment their accountholders already know and trust.

Administrative Settings & Access

Access levels are toggled by role or team, ensuring secure privileges and tools are granted in accordance with the financial institution’s administrative policies and workflows.



Support

✓

Manage conversations

✓

Manage support settings

✓

Manage form submissions

✓

Manage video chat

Centralized Audit Trail

Each and every session is recorded and tied to the interaction history. Data is captured within Banno People™ to support training as well as compliance review.

Platform-Wide Availability

Availability across Banno Online™ and Banno Mobile™ ensures accountholders engage within the bank or credit union’s authenticated environment, allowing financial institutions to maintain consistent service standards across all digital touchpoints. Without the risks associated with unauthenticated third-party tools, this centralized approach not only secures sensitive information but also creates a simplified experience for accountholders, accelerating support resolution. This all comes at a convenience to the accountholders, turning daunting tasks into simplified interactions.

retain high-value accountholders

Advanced Guidance sets itself apart by allowing financial institutions to universally humanize their digital experience through their greatest asset: their team. When a high-value accountholder encounters uncertainty, they don't wait for an email, they seek immediate support and action.

Advanced Guidance transforms these moments of hesitation into executed business by providing the immediate, human-led support needed to prevent abandonment. By resolving complex inquiries in a single digital session, financial institutions protect their bottom line while maintaining the trusted personal connection that defines their narrative.

personalize your impact with the Support Suite

Learn more about the [Support Suite](#) or reach out to us at digitalexperience@jackhenry.com

For more information about Jack Henry, visit jackhenry.com.