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Digital Experience in Finance:

## How to Pick the Right Platform

Why Financial Services Need a New Approach to Digital Experience

Today's customers demand more from their banks—they expect digital experiences that are as simple and seamless as checking out of an e-commerce app. For banks, the challenge is meeting these demands without compromising security or compliance, especially when friction can lead to lost revenue, increased fraud risk and greater regulatory exposure.

Traditional analytics tools often fall short. Tagging slows teams down. Session visibility breaks at login. Authenticated flows go dark just when insight matters most.

Financial services teams need platforms purpose-built for this reality. Platforms that capture 100% of the user data, preserve session context across web, mobile app and hybrid, quickly delivering clear, actionable insights.

This guide outlines what BFSIs should look for in a digital experience platform (DXP). From tagless capture to mobile app analytics and fraud detection, we'll show how Glassbox delivers the visibility, intelligence and control needed to power secure, seamless digital journeys.

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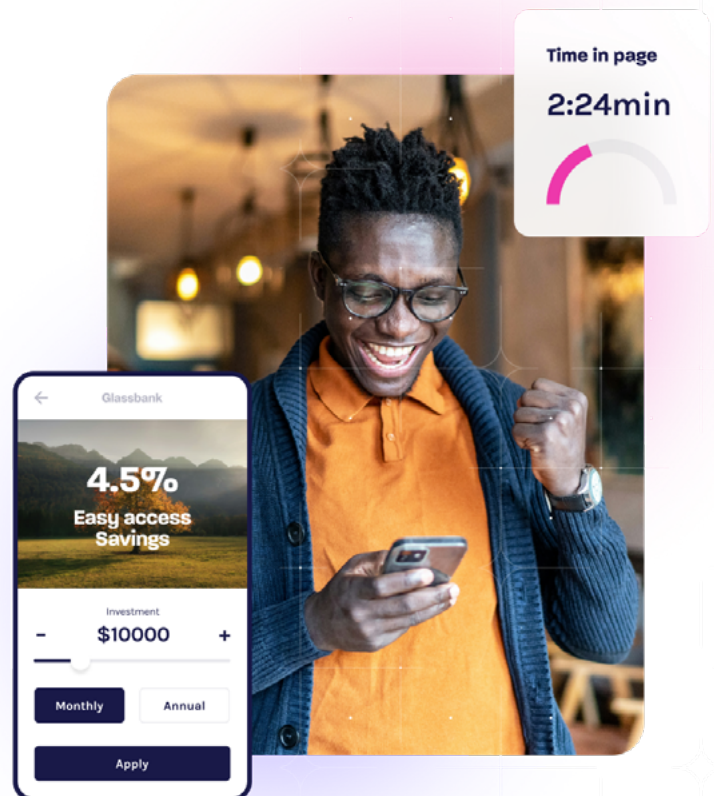
Session Replay with Granular Detail

In financial services, customer journeys span authenticated and unauthenticated environments, from product pages to secure account dashboards. Most DXPs lose visibility the moment login happens. Glassbox doesn't.

Our session fingerprinting technology ensures continuity across redirects, sub-domains and login transitions, without sacrificing compliance. Instead of relying on client-side cookies that break on redirect, Glassbox stitches sessions server-side for a complete, uninterrupted view.

This matters in every critical moment: onboarding, account recovery, mobile deposit, application flow, etc. Teams can see exactly where drop-offs occur, even mid-session, and understand the real customer journey end-to-end.

You can replay user journeys across every page and flow, turning fragmented insights into actionable context. That's essential for resolving issues faster, creating better experiences that lead to conversions.

Glassbox helps banks, insurers and fintechs see the full story behind every interaction—no blind spots, no gaps.

Struggle score

12%

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02 Mobile App Analytics Designed for Financial Institutions

Mobile apps are at the center of modern finance. From checking balances to submitting claims, mobile is where financial services customers spend their time. Yet many analytics platforms treat mobile as an afterthought, offering limited support or failing to capture nuanced interactions.

Glassbox delivers enterprise-grade mobile analytics with SDKs for native (Flutter, React Native) and hybrid (Cordova, Xamarin) frameworks, ensuring no gesture goes unseen.

You don't just see where users drop off—you understand why. Funnel visualization shows where friction occurs. Session replay reveals confusing steps or broken interactions. Issues such as rage-taps, failed zoom-ins and app crashes come into full view. For fraud teams, this granular level of gesture data flags anomalies such as bot-like scrolling and rapid device switching, which traditional tools often miss.

Welcome to internet banking

Please enter your login details below

That level of detail is mission-critical when users are transferring funds, submitting applications or completing sensitive transactions. **It's how you retain customers, reduce abandonment and stay ahead of performance issues before they scale.**

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03 Built-In Privacy, Security & Compliance at Scale

Financial institutions operate under the most demanding regulatory frameworks (GDPR, CCPA, HIPAA, GLBA, PCI-DSS), and they must meet those standards without slowing innovation.

Glassbox uses "Privacy by Design" at its core. The platform masks sensitive data at the point of capture, logs every interaction, applies encryption and enforces user-level access controls. Teams can configure masking rules through an intuitive UI without requiring endless dev tickets.

Our patented session masking technology strikes the balance between protection and precision. You retain insights without risking overexposure, whether you're monitoring a mobile app, authenticated dashboard or multi-step form.

The result? Audit-ready analytics at scale. Teams move fast, stay secure and keep regulators confident. While other platforms require developer intervention for privacy controls, or lack the granularity financial services demand, Glassbox provides the compliance foundation today's digital leaders need.

Security and usability shouldn't be tradeoffs. With Glassbox, you get both.
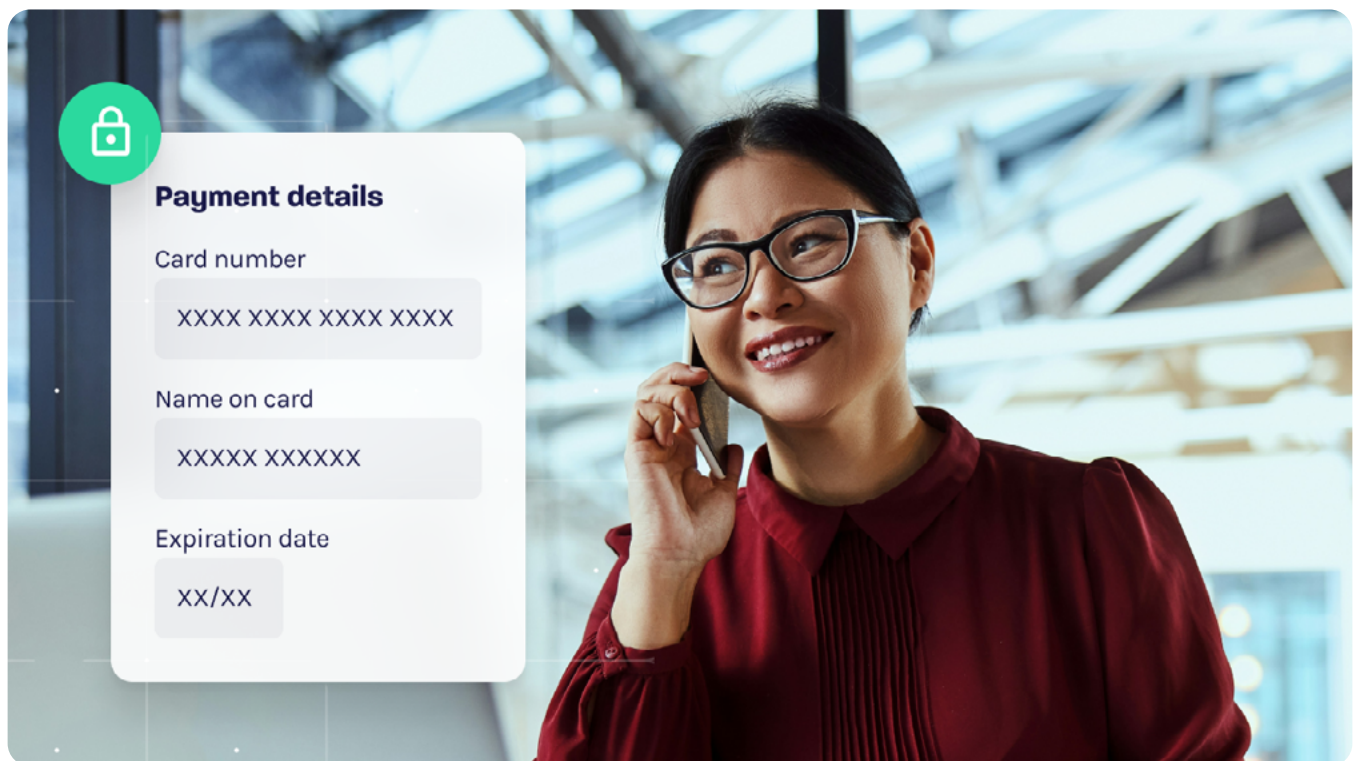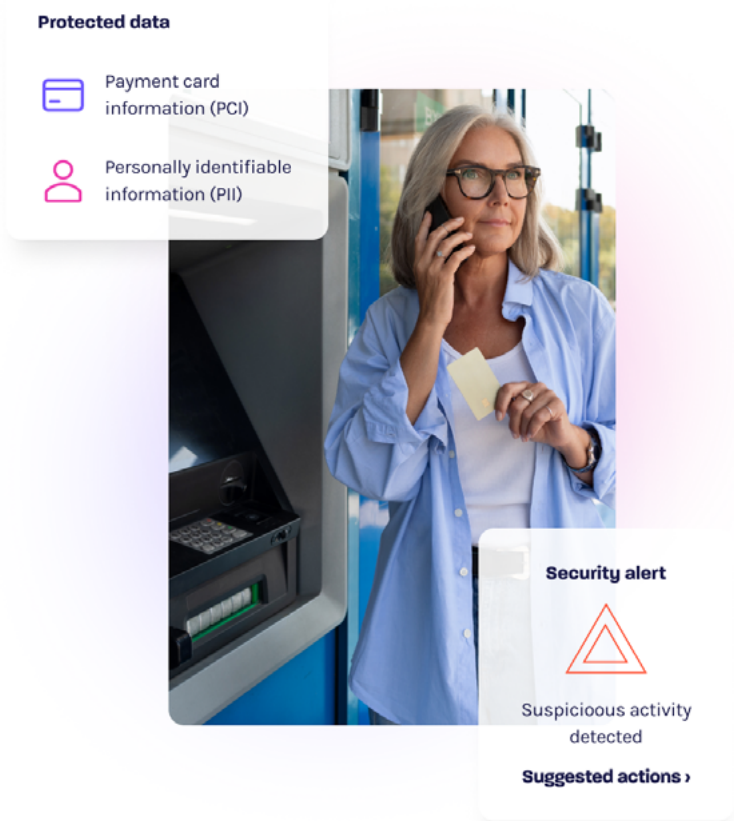
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04 Fraud Detection Through Behavioral Insight, Not Just Triggers

Fraudulent behavior isn't always obvious. Sometimes it looks like a broken journey. A sudden switch in behavior. A new payee added at the wrong time.

Glassbox enhances traditional fraud prevention systems with a behavioral layer that reveals suspicious patterns before transactions complete. The platform captures every user session—taps, rage-clicks, form fills—and detects patterns that signal potential threats. These anomalies aren't just technical noise; left unchecked, they can lead to abandoned transactions, undetected fraud attempts or customer churn.

Customize real-time alerts to trigger when behavior deviates from the norm: multiple failed logins across devices, suspicious form activity, bot-like navigation patterns. Teams get full session replays, turning suspicion into visual evidence.

Use Glassbox to spot account takeovers, mitigate synthetic fraud and catch silent threats before they escalate. By integrating with your existing fraud stack, Glassbox empowers risk, fraud and UX teams to collaborate, investigate and act fast.

It's not just about detecting fraud after it happens. It's about recognizing when it's about to.

Protected data

Payment card information (PCI)

Personally identifiable information (PII)

Security alert

⚠️

Suspicioous activity detected

Suggested actions ›

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05 Tagless Data Capture for Real-Time Visibility

In most analytics platforms, insights are only as good as the tags you configure. But in financial services, customer behavior changes fast, and tagging can't always keep up.

Glassbox removes that limitation. After a single lightweight tag is deployed during setup, our platform captures every user action automatically: clicks, taps, errors, field entries, navigation patterns. No additional tagging required.

That means no delays when a new issue emerges. No blind spots in authenticated flows. No dev time lost to instrumenting every form field. Just instant access to the data you need, now and retroactively.

Regulatory audits demand complete, verifiable records. Customer experience teams need flexibility to explore behavioral trends as they unfold. And fraud detection requires total visibility, not guesswork.

With Glassbox, teams can ask new questions, spot new problems and find new opportunities, without waiting for a release cycle.

Tagging belongs to the past. Glassbox gives you a full, retroactive record of every digital moment.

Average Rendering Performance

▼ 2.4 s

Crash Analysis - Loan Applications

Crashes per OS Version

6.3%

● iOS 13.4.1   ● Android 8.1.0
● Android 10   ● Android 9

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Enterprise-Level Support for Financial Services Teams

A digital experience platform is only valuable if it works across your entire organization. That's where Glassbox stands apart.

Glassbox supports digital, risk, compliance and product teams with features designed to unify, not silo, teams. Whether you're optimizing a mobile flow, preparing for an audit or triaging a fraud alert, everyone works from the same real-time data.

Glassbox enables:

- Digital and UX teams to pinpoint friction and launch changes faster
- Compliance and risk teams to maintain audit-ready visibility
- Fraud and security teams to enhance detection with behavioral context
- Product and marketing teams to test and measure with confidence

For example, by integrating with A/B testing platforms like Adobe and Google Analytics, Glassbox reveals the full story—showing not just which version won, but the behavioral patterns and user actions behind the results. It can even uncover friction points on the "losing" variant that traditional metrics miss.

Glassbox isn't just a platform. It's a partner in making digital transformation real, across every department.
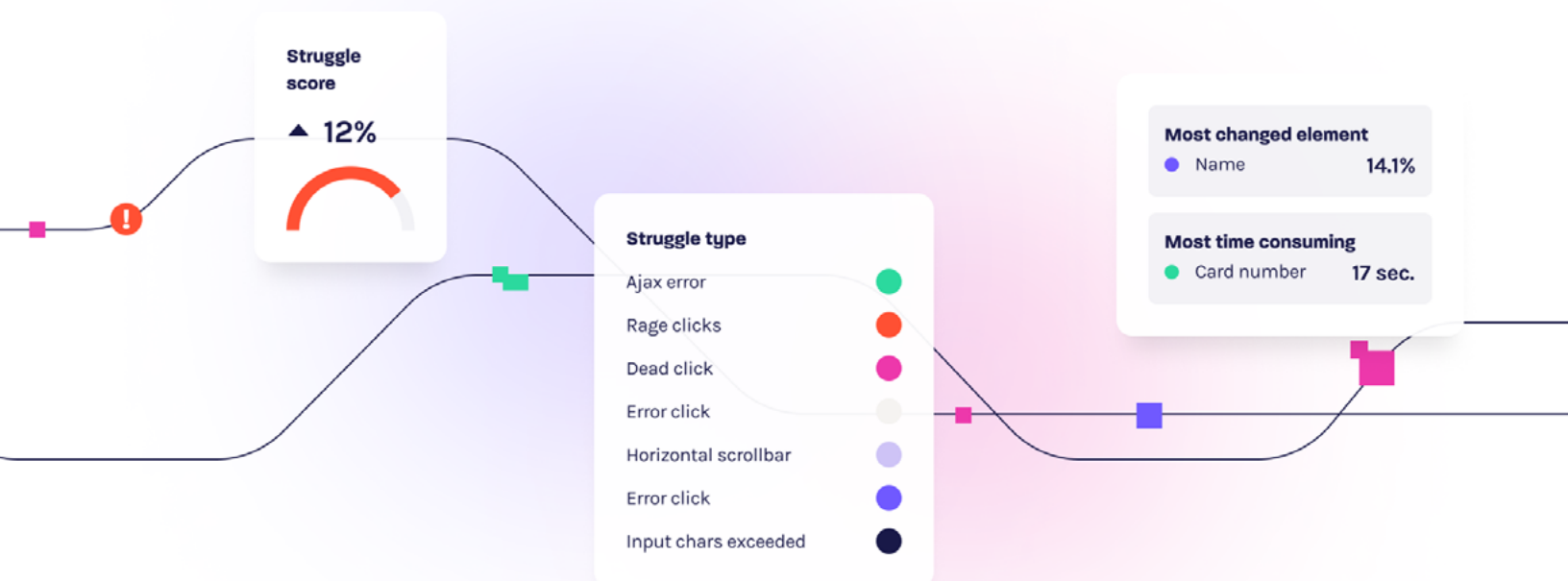
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Making the Decision: Why Glassbox for Financial Services?

Choosing the right digital experience platform is more than a feature checklist. It's about finding a solution built for the realities of financial services.

Throughout this guide, we've covered the core capabilities that matter most:

- Tagless data capture
- Session replay with full visibility
- Advanced mobile app analytics
- Built-in privacy, security and compliance
- Behavioral fraud detection
- Enterprise-wide collaboration and support

Glassbox was designed for highly regulated industries, with a platform that balances speed and oversight, flexibility and control. Whether your goal is reducing digital abandonment, improving mobile journeys or passing your next compliance audit with confidence, Glassbox equips your teams with the data and tools to make smarter, faster decisions.

Want to see it in action?

Take a self-guided platform tour and discover how Glassbox can help your institution deliver seamless, secure and high-impact digital experiences at scale.

Glassbox is the premier provider of AI-fueled customer intelligence solutions, working with the world's smartest digital brands to revolutionize the way companies engage and connect with their customers online. Purpose-built for the enterprise, Glassbox securely captures data across infinite digital interactions to understand the root causes behind customer behaviors, transforming data into decisions so brands can act in mere minutes. Customers across industries and geographies, including Marriot Hotels & Resorts, Quicken, Inc., Credit.com, Danone, L'Oreal, Nestle, Ace Hardware, Air Canada, and 60% of the world's largest banks, choose Glassbox to translate deep customer insights into enhanced digital experiences, leading to improved brand loyalty, conversions and revenue. Glassbox has been recognized for its industry prowess and strength of its solutions by G2, named as a G2 Top Software Company and a leader in multiple categories based on high satisfaction scores from real customer reviews.

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