Behind Login

Increase lifetime value of existing customers by optimizing the experiences that matter the most.

As a financial services provider, ensuring a smooth customer experience on the secure area of your website is critical to your success. Customers are logging in to conduct a host of account management actions and other transactions – paying bills, making money transfers, managing investment accounts, downloading personal documents, or asking for a quote, to name a few. Providing a superior, customer-centric experience is imperative to maximize the lifetime value of these customers, who have already placed their trust in your services.

Clicktale fully supports every type of environment behind logins, including account management and self-service to company intranets or other internal applications.

Behind login, see why customers are:

- Engaging (or not) with particular content, links or promotions within pages

- Not converting at the expected rates or dropping off forms

- Failing to arrive at search results

- Exiting a page prior to taking action

- Abandoning requests for quotes or assistance

- Receiving errors on help pages

- Leaving feedback – negative or positive

- Repeating activities numerous times

Clicktale®

How it works

Clicktale provides tools to block
Personally Identifiable Information
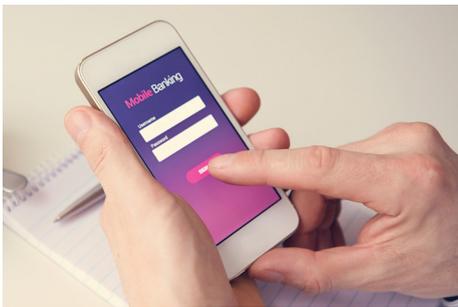
Addressing customer needs behind login is achieved in the same manner that Clicktale uncovers visitor behavior and intent on the public area of a website – via a personalized workspace that automatically surfaces issues and opportunities, in-page path analyses, psychological insights, and best-in-class visualizations such as data-rich heatmaps and session replays. However, once a visitor logs in and his or her identity and sensitive financial information is shown on the screen, it's mission-critical to protect that data. Financial institutions require certainty that their sensitive data does not fall into the wrong hands, and any collection of such data must be conducted using the highest levels of protection.

Clicktale provides clients with the ability to block recording and collection of any Personally Identifiable Information (PII) entered by keystroke, as well as any PII as defined by the customer contained within the webpage. No private information is transferred from the browser to Clicktale, nor recorded in these environments.

Furthermore, any page delivered over HTTPS is also transmitted to its servers via HTTPS, supporting only the latest encryption protocols. As Clicktale relies on sending the HTML page from the browser to our servers, it is never necessary for our technology to re-authenticate against the website, reducing the need to provide Clicktale with valid credentials to the site.

Removing Personally Identifiable Information (PII)

Best practice: identify PII in the HTML
with special tags

Clicktale's customers include Fortune 500 companies in the financial services, telecommunications, e-commerce, technology, travel and media sectors, several of whom have developed successful methodologies for removing PII. One best practice is to identify PII in the HTML itself by using special tags. The tags are picked up by Clicktale and then blocked automatically, which removes the need to manually block every instance of PII.

Clicktale has also developed several additional methods for blocking PII, including: JavaScript API that utilizes CSS selectors; adding a CSS class in the HTML mark-up or via JavaScript code that automatically masks all textual content; a Clicktale "ExcludeBlock" to exclude full blocks of content using HTML markup; among other methods. Clicktale's thorough PII removal methods are almost effortless for the customer.

Trust in the Clicktale source code and platform

Automated scanning of uncompiled
source code and numerous additional
security features

Clicktale utilizes automated scanning to assist our R&D teams to uncover and fix potential security flaws within our uncompiled source code. Clicktale also implements an advanced Security Incident and Event Management (SIEM) solution to audit, monitor, aggregate, and correlate security alerts, ensuring swift discovery and response to security incidents.

In addition, the Clicktale experience management platform contains numerous security features, including user authentication, authorization levels, account lock-out, single sign-on, and in transit encryption.

Ironclad security policies and ISO 27001 certification

Frequent security audits and a dedicated internal security team to meet your needs

At Clicktale, security is a top focus. Our dedicated security team is part of the business lifecycle and ensures that every aspect within the company is adequately evaluated and risks are addressed. We are constantly enhancing our security practices, which are implemented across the organization. Our security program includes formal adaption by senior management of numerous policies, including: Information Security, Risk Management, HR Security, Asset Management, Acceptable Use, Data Classification, Physical and Environmental Security, Data Disposal, Access Control, Incident Management and Response, and others.

We have penetration tests conducted by third parties conducted at least twice a year to verify security robustness. Not only is our hosting center ISO 27001 certified – but we are ISO 27001 certified ourselves. The result is that Clicktale passes security tests with flying colors when customers evaluate Clicktale to fit with their internal security team's policies and requirements.

Additional security enhancements

For financial services clients, Clicktale can provide additional security support, such as:

- Restrictions on project access to a limited number of people
- Access control logs
- Dedicated third-party security review for any custom code

Recommended additional reading:
- Clicktale Security Data Sheet
- Enterprises Require Enterprise-Capable Solutions
- Telus Case Study: How much could your business save by improving its self-service experience?

About Clicktale:

Clicktale taps into the wisdom and behavior of millions of visitors so that businesses can deliver the best digital experiences and drive amazing business results. Complex behavioral patterns are synthesized based on millisecond-level actions such as hovers and scrolls, enabling businesses to interpret their customers' digital body language to understand intent. The pioneer in Experience Analytics, Clicktale marries cognitive computing, machine learning and psychological research to automatically surface issues and answer questions that keep executives up at night. With unique behavioral data, clear visualizations, and world-class customer experience expertise, Clicktale is driving the "Experience Era" at the world's leading brands and Fortune 500 companies.
Clicktale. Answer anything.

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