

# Insights from Nicolas Piël, Founder and CEO of co-browsing specialist Surfly



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Presented By: [CrmXchange](#)

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CrmXchange Managing Partner Sheri Greenhaus conducted a series of in-depth conversations with CX/contact center solution providers who were scheduled to present at the postponed Enterprise Connect event. Here are insights from Nicholas Piël, Founder and CEO of [co-browsing](#) specialist Surfly.

Everything has changed over the past weeks since the coronavirus has taken hold. We have seen a surge of requests for our co-browsing solution that allows businesses to work remotely with customers, and the interest continues to grow. Our goal at the moment is to address the short-term needs of our customers as well as maintain our focus on what will happen in the long term. We like to remind our customers that while they may have a serious need to find a solution for today, they should also make sure it will work for them six, twelve, or eighteen months down the road. It's a marathon, not a sprint.

What we offer is very straight forward: the ability to upgrade any conversation from any channel into a co-browsing session that lets you collaborate with your customers as if you were side-by-side. Our existing clients tell us usage is really ratcheting up. This is especially true of insurance companies who are looking for additional services in order to scale up to meet the demand of the "remote" customer.

Unfortunately, co-browsing has not always been simple for customers to use. In many cases, customers were asked to download or install software to make it work. This is not a great customer experience, especially if they are reaching out because they are confused about something on a website or portal. At Surfly one of our core tenets is to make co-browsing easy.

Surfly was built in such a way that a co-browsing session can be started by simply clicking on a link or a button. Our customers simply add a few lines of code to their website and a Live Help button is placed at the bottom of their website. When a customer clicks on the button, a co-browse session is started and generates a PIN code. They provide the agent with the PIN code and they can then see what their customer sees. It enables agents to navigate backward, forward and even go into menus. We also make the mobile interface work automatically, so nothing needs to be set up for the agents.

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For example, on the CrmXchange website, we can direct subscribers who want to download white papers where to go to enter their email address. Control can also be given to the agent so that they can fill in information for the customers. The client can even upgrade to video chat where the agent can join in. All of this can be done without any setup or installation.

Our technology allows businesses to take any web application and easily transform it so the agent can work together with their customers. The difference between screen sharing and what we do, is the simplicity of the process. Customers can go live almost immediately and we integrate with many contact center solutions. In most of the use cases we see, the impetus is to provide added value to an existing phone conversation. The benefit of having these co-browse sessions is that even though the agents might be working remotely from home, the customer is still talking to a fully functioning representative of the company with whom they started the call.

At the outset of the crisis, our focus was mainly on requests from insurance and financial services. The reason for the high interest in that sector is that they offer complex products and require a solution that can make it simpler for people to work their way through the process. An agent with Surfly at their disposal can help guide customers through the nuances of their policies for example. While those were the type of businesses that we were originally focusing on, we now find ourselves being contacted by companies across many industries including automotive, retail, real estate, and small business owners. We're finding different types of applications from businesses that usually have face-to-face contact with customers but now need to interact remotely. We tell our clients that they can simply brand their own websites as the platform in order to better collaborate with their customers.

## **Analytics**

We are a European company and as such, must comply with GDPR standards. By default, we don't store any sensitive data. In cases where compliance is required, such as providing financial advice, it needs to be made explicit. This means if a business needs to determine if an adviser or customer clicked on specific links or buttons, we can go back and perform an audit trail. While not stored in our system, the information can be pushed back to our client's system. Our clients can see where people have clicked and the specific detailed follow up sections where they have gone. The only thing we can see is the meta data: how many conversations were started. We firmly believe that sensitive data should be protected but that we shouldn't be telling our clients how to do that. Our mission is to build and supply a very cool technology that allows businesses to better communicate with customers, but it's up to our clients to decide what to do with the data and how to handle it.

We've started some great partnerships. NICE inContact is now offering our solution on the app exchange and we believe those will expand. We had planned on exhibiting at Enterprise Connect to make an introduction into the US market and perhaps to meet with potential partners, but that, like most other events, have been delayed. Growing through strong partnerships is a huge focus for us. When you have a really strong technology, you need someone else to bridge the gap with customers and forming partnerships is one of the best ways to do that.

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## Results

We've seen evidence in insurance companies that they are receiving considerably higher NPS scores after implementing Surfly. We had originally expected that with guidance, sessions would be shorter. But actually, it was the opposite. Sessions turned out to be longer. That is because people are so excited that there is now an agent who can follow along and help them. From the original call, the conversation often expands to other areas. Thus, while the length of a call may expand, our clients will not only experience higher NPS but more important, better conversion rates. This is of course crucial for companies with a sales focus. One of our clients reported conversion rates four times higher than before they had a co-browsing solution. What makes it particularly effective is that customers appreciate interacting with an agent who is not only seeing what they are, but also explaining it in real time.

A lot of customer frustration comes from their perception of contact centers as places where agents are following a script and not responding to the issue. But when the agent and customer are working together and looking at the same screen, the interaction is far more relevant. That's the beauty of co-browsing. Bringing in video chat makes it even better. For example, when a customer calls a company and says they don't understand their bill, what they often mean is that they think the bill is too high. If an agent doesn't make them feel like they are being helped with that specific issue, they feel like they are not being taken seriously. However, when the agent can discuss the bill in detail, explain every component, and tell them what they can do to correct it, the customer feels more like they are valued. Co-browsing is not just dealing with complex issues, it's creating an emotional flow and developing trust.

Businesses can dramatically enhance the customer experiences in their contact center by making co-browsing available. It makes it easier for the customer to get the answers they need and helps increase NPS. We help you communicate more effectively with your customers by letting them work together.

We help companies to make their website a far more effective tool, where they can communicate with their customers with the single click of a button. Customers and agents can work together and see the same thing – regardless of where either is located. It enables businesses to optimize the journey and genuinely understand the customer's needs.

