Surfly Recognized for

2021

Enabling Technology Leadership

Global Visual
Engagement Tools Industry
Excellence in Best Practices

FROST & SULLIVAN

Best Practices Criteria for World-Class Performance

Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each Award category before determining the final Award recipient. The process involves a detailed evaluation of best practices criteria across two dimensions for each nominated company. Surfly excels in many of the criteria in the visual engagement tools space.

AWARD CRITERIA

Technology Leverage	Customer Impact
Commitment to Innovation	Price/Performance Value
Commitment to Creativity	Customer Purchase Experience
Stage Gate Efficiency	Customer Ownership Experience
Commercialization Success	Customer Service Experience
Application Diversity	Brand Equity

Promising Prospects for the Visual Engagement Tools Market

Frost & Sullivan's independent research reveals promising prospects for the visual engagement tools market due to the rising number of digital interactions enabling end-to-end digital customer journeys, the higher share of people working from home, and the increasing focus on customer experience (CX) and agent experience.[1] Furthermore, millennials now represent a significant consumer segment, and the proliferation of smartphones and other connected devices fuel this market.

For this reason, right-fit technology investments in different visual engagement tools (i.e., video, co-browsing, screen sharing, and annotation) can deliver tangible business outcomes, such as reduced customer effort, higher agent engagement and empowerment, and improved resolution rates. Businesses carefully assess frontline technology needs, as rich visual engagement and content sharing can complement or replace traditional audio and chat-only engagements between companies and customers. As a result, technology vendors and service providers are progressively capitalizing on these opportunities. While not all customers may be comfortable interacting face-to-face with a contact center agent or sharing personal data (e.g., the complete screen of their device), Frost & Sullivan recognizes how visual engagement tools can help build trust and customer intimacy during high-value procurements and purchases (e.g., mortgage or an insurance policy).

Notably, co-browsing emerges as one of the fastest-growing segments in this market due to its strong

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[1] *Global Visual Engagement Tools Growth Opportunities: Innovative Visual Communications Technologies Drive Transformational Growth* (Frost & Sullivan, July 2021)

security and privacy capabilities. Agents can observe an accurate, near real-time visual representation of the customer's browser (while other open windows remain hidden), allowing them to navigate a website, web portal, or mobile application (app) together in real time. Ultimately, this solution turns any customer interactions into a collaborative session.

Despite the high growth potential of this market, Frost & Sullivan analysts find that end-user organizations consider various critical factors when selecting a visual engagement tool vendor:

▪ **Integration**: The integration capabilities of co-browsing solutions with other tools and channels (e.g., CRM's, call center platforms,live chat) and existing infrastructure influence the value-add.

▪ **Pricing**: Companies demand flexible price plan options, i.e., paying only for best-suited models and functionalities to avoid massive overspending.

▪ **Security**: As security is a core value in the customer journey, end-users require advanced field masking and encryption capabilities. In addition, all solutions and procedures must meet compliance and regulation requirements.

▪ **Customer references**: Customer references provide an essential competitive edge by demonstrating a supplier's experience and brand value.

▪ **Comprehensive device and browser coverage**: Optimal solutions support mobile apps, desktops, and other devices; therefore, comprehensive browser coverage is essential.

▪ **Speed**: The speed at which participants (i.e., agents and customers) can start a visual-supported session together is paramount. Long onboarding periods will delay the resolution time of each engagement and adversely affect the CX.

Technology Leverage and Customer Impact of Surfly

Founded in 2012 and headquartered in Amsterdam, the Netherlands, Surfly is a leading global provider of advanced co-browsing and video chat solutions. Developed to enable seamless, fast, and visual-based interactions between agents and customers, Surfly's interaction middleware technology enables rapid deployment of new types of collaborative functionalities transforming existing online journeys with minimal effort. Its dedicated team of more than 40 technocrats addresses the specific requirements of enterprises across industries (e.g., financial services, banking, insurance, retail, healthcare, and telecommunications), thereby allowing brands to connect efficiently with customers by recreating a face-to-face experience.

Cutting-edge Technology Enables Code-free Deployment to Elevate the Customer Journey

Surfly enables customers to innovate online interaction through its co-browsing solution. As it allows both parties to navigate together, agents can instantly see the customer's issues or start a joint web session to illustrate or explain a concept. Surfly's solution distinguishes itself by its code-free deployment; there is no need to download or install code to begin using it. This capability is a game-changer; removing this hurdle makes deployment faster and simpler. For example, it means that relevant changes on end-user organizations' website, or within their technology stack, do not require updating the co-browsing solution.

Furthermore, this cutting-edge technology operates on all modern browsers (including Chrome, Firefox, Edge, Safari, and Opera), can overcome all cross-domain policies, and works across all elements on the navigated site or even 3rd party content on different site. Its unique capability to capture all visual updates accurately means that this co-browsing solution can change web content on the fly. As a result, Surfly enables agents to support customers throughout the complete journey, with an example being able to move seamlessly from the end-user organization's portal (e.g., writing a policy) to a payment portal, a document signing portal, and a government identification verification portal to ensure a consistent and branded experience.

> *"Its unique capability to capture all visual updates accurately means that this co-browsing solution can change web content on the fly. As a result, Surfly enables agents to support customers throughout the complete journey, moving seamlessly from the end-user organization's portal (e.g., writing a policy) to a payment portal, a document signing portal, and integrates with a government identification verification portal to ensure a consistent and uniform experience."*
>
> *- Federico Teveles, Industry Analyst, ICT*

Enabled by this unique approach, the Surfly solution does not need costly integration with the end-user organization's technology stack. The middleware technology runs on top of any company's existing platform. Utilizing an approach similar to a content delivery network, Surfly makes requests to any application to transform the end-user organization's platform into a fully collaborative space. As such, Frost & Sullivan lauds Surfly for the simplicity and efficiency of its co-browsing solution, empowering end-user companies to customize and manage it effortlessly. Moreover, companies can even pick the most suitable server to reduce latency and optimize performance. Surfly nicely creates a trusted environment through its superb security offering, including features such as element masking, single sign-on, encryption of in-transit data, full audit log controls, and the assurance that no data is ever stored. Lastly, Surfly offers a set of optional features with its co-browsing technology, enabling agents to share documents during sessions or switch the control of the sessions.

Surfly Enhances the Ultimate Customer Engagement Experience

By adding Surfly's Co-browsing solution, companies no longer need to rely on external meeting tools and can transform their existing web applications into a full featured collaborative platform. This enables any company to create a customer experience that is seamless, fully branded, and compliant. For example, an agents can use Surfly's technology to have real-time collaboration sessions with potential customers, guide customers through a web portal that explains the benefits of a product or service, assist customers in completing an online purchase, fill out a form, e-sign an agreement, help customers navigate a website to complete a specific task, or diagnose and resolve customer issues.

The company already has highly-regarded references and proven experience with complex customers requiring sophisticated technology, security, and data management standards. Customer testimonials verifying the benefits presented by Surfly include various industry leaders, for example, Achmea, AXA, and Empire Life in the insurance space. Notable are the advanced customization capabilities (including customizable user interface and easy-to-manage allowing and blocking features) that help provide outstanding customer support throughout the complete customer journey - from onboarding and

advising services to sales and support.

Surfly's go-to-market strategy leverages two channels. Through its direct sales channel, Surfly assists companies who want to add innovative functionality quickly; thereby, enabling them to offer new benefits for specific customers. Surfly's partner channel leverages the technology to deliver an outstanding product to the end customer by relying on and collaborating with experts in particular verticals. Most importantly, Surfly's technology adds tremendous value in the way that it allows companies to add extra layers to content (e.g., regulatory rules). It can also provide insights to the client drawn from the interactions and shared content between agents and customers during sessions.

> *"Surfly's solution distinguishes itself by its code-free deployment; there is no need to download or install code to begin using it. This capability is a game-changer; removing a hurdle makes the process faster and simpler."*
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> *- Riana Barnard, Best Practices Research Analyst*

Conclusion

Businesses are increasingly required to provide responsive and adaptable customer service by answering questions, solving problems, and giving advice to customers in a conversational, human, and effective way. Hence, rich visual engagement and content sharing progressively complement or replace traditional audio and chat-only interactions between businesses and customers.

Surfly enables customers to innovate online interaction through its co-browsing solution. Developed to allow seamless, fast, and human visual-based interaction between agents and customers, its core interaction middleware technology enhances clients' customer experience and business service capabilities. As it runs on top of any company's existing platform, it makes requests to any application from a newly-created content delivery network; thereby, transforming the end-user organization's platform into a fully collaborative space.

Frost & Sullivan analysts conclude that Surfly's advanced solution truly distinguishes itself through best-in-breed capabilities, such as code-free deployment delivered within an ecosystem that complies with outstanding security and data management standards. Even though the solution manifests simplicity and ease of use, it is highly customizable. Ultimately, Surfly enables agents to support customers throughout the complete engagement journey to recreate a face-to-experience that adds value to every level of the interaction.

With its proprietary technology and commitment to innovation that drives unprecedented value for customers and end-users, Surfly earns the 2021 Global Frost & Sullivan Enabling Technology Leadership Award.

What You Need to Know about the Enabling Technology Leadership Recognition

Frost & Sullivan's Enabling Technology Leadership Award recognizes the company that applies its technology in new ways to improve existing products and services and elevate the customer experience.

Best Practices Award Analysis

For the Enabling Technology Leadership Award, Frost & Sullivan analysts independently evaluated the criteria listed below.

Technology Leverage

Commitment to Innovation: Continuous emerging technology adoption and creation enables new product development and enhances product performance

Commitment to Creativity: Company leverages technology advancements to push the limits of form and function in the pursuit of white space innovation

Stage Gate Efficiency: Technology adoption enhances the stage gate process for launching new products and solutions

Commercialization Success: Company displays a proven track record of taking new technologies to market with a high success rate

Application Diversity: Company develops and/or integrates technology that serves multiple applications and multiple environments

Customer Impact

Price/Performance Value: Products or services provide the best value for the price compared to similar market offerings

Customer Purchase Experience: Quality of the purchase experience assures customers that they are buying the optimal solution for addressing their unique needs and constraints

Customer Ownership Experience: Customers proudly own the company's product or service and have a positive experience throughout the life of the product or service

Customer Service Experience: Customer service is accessible, fast, stress-free, and high quality

Brand Equity: Customers perceive the brand positively and exhibit high brand loyalty

About Frost & Sullivan

Frost & Sullivan is the Growth Pipeline Company™. We power our clients to a future shaped by growth. Our Growth Pipeline as a Service™ provides the CEO and the CEO's growth team with a continuous and rigorous platform of growth opportunities, ensuring long-term success. To achieve positive outcomes, our team leverages over 60 years of experience, coaching organizations of all types and sizes across 6 continents with our proven best practices. To power your Growth Pipeline future, visit Frost & Sullivan at http://www.frost.com.

The Growth Pipeline Engine™

Frost & Sullivan's proprietary model to systematically create on-going growth opportunities and strategies for our clients is fuelled by the Innovation Generator™. Learn more.

Key Impacts:

- **Growth Pipeline:** *Continuous flow of Growth opportunities*
- **Growth Strategies:** *Proven Best Practices*
- **Innovation Culture:** *Optimized Customer Experience*
- **ROI & Margin:** *Implementation Excellence*
- **Transformational Growth:** *Industry Leadership*

The Innovation Generator™

Our six analytical perspectives are crucial in capturing the broadest range of innovative growth opportunities, most of which occur at the points of these perspectives.

Analytical Perspectives:

- **Mega Trend (MT)**
- **Business Model (BM)**
- **Technology (TE)**
- **Industries (IN)**
- **Customer (CU)**
- **Geographies (GE)**