

The Ultimate Guide to Co-browsing



Preface

Are you looking to implement co-browsing in your business? This e-book will explain co-browsing technology, its benefits, limitations, and the things to consider while choosing a co-browsing vendor.

We hope this e-book will help you decide whether co-browsing makes sense for your business.

Introduction



With every technological advance, more and more activities transition to a digital format. By 2019, for example, [over 47 percent](#) of companies' sales professionals were inside sales reps (i.e., sales reps with little or no face-to-face interaction with customers).

This transition accelerated during the pandemic. In 2020, driven by lockdowns and a reduction in in-person interaction, businesses prioritized visual engagement (i.e., using visual tools like video chat and co-browsing while interacting with customers).

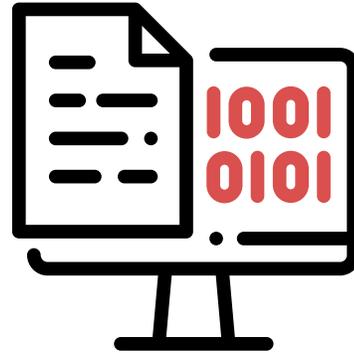
In fact, [89% of companies](#) were considering devoting more of their resources to visual engagement.

As customers look for better ways to make purchasing decisions, receive software support, and engage with companies from the convenience of their homes, visual engagement tools like co-browsing will continue to thrive.



What is co-browsing? How does it work?

Co-browsing software is a visual engagement tool that allows users to navigate and interact with a web page together in real-time. With co-browsing, a person shares a browser window with one or more users and they can all interact on the same web page collaboratively.



The technology works by taking all the HTML content that makes up the web page you want to share, sending it to the participant, and rendering the page on their browser. Since this data is text-based, it requires less bandwidth than screen sharing. That means it's faster and less resource-intensive.

Co-browsing solutions enable your team to engage customers' visual attention through a collaborative shared browser session. Participants can pass control of the browser back and forth, which is beneficial in many contexts.

For example, here are a few ways businesses are leveraging collaborative browsing to improve customer experience:

1

A customer can navigate to a page where they're having a problem, and a customer support representative can take over to diagnose and fix the issue.

2

An insurance agent can walk a customer through paperwork and give the customer control to sign it.

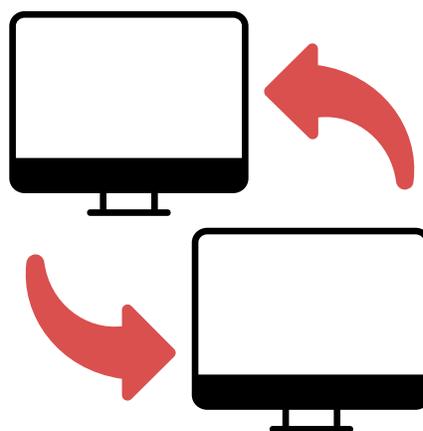
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A software sales representative can give a customer control during a product demo to try the product themselves.



What's the difference between co-browsing and screen sharing?

While co-browsing and screen sharing share some similar use cases, there are quite a few differences between co-browsing and screen sharing. To understand these, it's important to know how screen sharing works. During screen sharing, all or part of your screen is shared by transmitting the pixels that make up your screen.



Therefore, the data being transmitted during screen sharing is completely different from co-browsing.

Co-browsing shares code, while screen sharing shares pixels. But since code is way smaller than pixels, screen sharing is very data intensive. This leads to a loss of quality.

Co-browsing never leads to a loss of quality as it shares the original code that makes up the webpage.



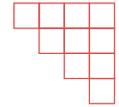
Co-browsing also has the advantage of being able to modify the code it is transmitting to enable or disable certain features or content. For example, you can optionally hide certain content (text fields, passwords, user details) from other participants to enable compliant journeys.

Additionally, co-browsing doesn't require setup or downloads, and seamlessly integrates within your existing web journeys on your own website or application.

Screen sharing requires the installation of a program, extension, or enabling of certain permissions to function. So, depending on your use case, screen sharing may be impractical. For example, using screen sharing to supplement live chat on your website for sales purposes would require the visitor to download and install the software before the sales rep can share their screen, adding a layer of complexity to your customer journey.



Types of co-browsing



There are three types of co-browsing:

Embedded co-browsing



An embedded co-browsing solution requires you to “embed”, i.e., add a snippet of code to each page you want to visit during your co-browsing journey. While this will enable you to co-browse every page of your website, the integration process is quite time-consuming and requires a lot of development resources. Additionally, it also means that you cannot co-browse on third-party websites.

Most co-browsing vendors use this technology

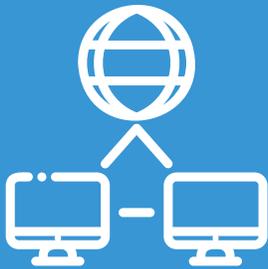
Remote browser-based co-browsing



Remote browser-based co-browsing involves the use of a browser in the cloud, built to be used by multiple users to co-browse with one another. Since it is a cloud browser, the rendering of the content does not happen on your own device, thus creating a lag compared to other forms of co-browsing. It also puts you at risk for potential security leaks, given that your security tokens, such as passwords, are kept in a device in the cloud – anyone who controls that device can obtain those tokens.

However, the advantage of this technology is that you have access to the entire web, therefore enabling you to co-browse third-party websites, in addition to your own.

Proxy-based co-browsing



A proxy-based co-browsing solution utilizes a proxy that acts as an intermediary between the website server and the users. The proxy receives the code and transmits it to other participants. If it is a content rewriting proxy, like Surfly's, it can also layer the code with various features like video chat, drawing tools, or document sharing.

With proxy-based co-browsing, you can co-browse any website on the web without needing to embed code in the website. This means that you can not only co-browse your own website, but also third-party websites, without needing any setup or installations.

While this is similar to remote browser-based co-browsing, the advantage with proxy-based co-browsing is that all the content is rendered on your own browser, ensuring minimal lag and higher quality. This also means that your security tokens remain on your own browser, thus ensuring the security of your web session.

Surfly uses this technology



Is co-browsing safe?

Yes, co-browsing is a very safe way to browse together.

This is because the interaction only occurs in a single browser tab and participants can never gain access to any other part of your device, even while switching control. This is unlike screen sharing, which allows you to access the entire device via remote control.

It's also important to select a vendor that can be trusted, and a technology that has features such as element masking and fine-grained control switching, while being ISO27001 compliant, and offering on-premise installations.



The benefits of co-browsing software

Businesses in various industries have seen benefits from implementing co-browsing software. Collaborative browsing:



Optimizes the sales cycle for remote sales teams

Increases customer satisfaction with real-time customer support

Enhances customer experience via remote personal shopping

No matter your industry, if the following benefits are relevant to you, co-browsing could make a positive impact.

1 It works with the tools you already use

All types of co-browsing work with your existing tech stack, but require varying levels of effort to get started. Proxy-based co-browsing technology is unique since the technology is plug and play, while being fully secure, allowing you to instantly add co-browsing to your website and instantly use it in conjunction with tools like Salesforce, other CRMs, or Contact Center platforms.

2 Increases customer engagement

Gallup research found that fully engaged customers provide 23 percent more value to a company. Banks see 37 percent more revenue, electronic stores see a 29 percent higher average order value, and hotels see 46 percent more revenue from fully engaged customers.

Gallup also reports that “companies that successfully engage their B2B customers realize 63% lower customer attrition, 55% higher share of wallet, and 50% higher productivity.”

Making an emotional connection is critical, but it can be challenging to create that connection digitally.

Web co-browsing makes it easier to connect with customers by engaging them in the conversation. For example, instead of having someone sit through a software demo, co-browsing websites allows a sales rep to hand over control so the customer can get actively involved.



3

No download necessary

Co-browsing technology uses web technology only. This allows co-browsing tools to enable the real-time transfer of audio, video, and/or other data between browsers without relying on external and or extra software.

4

No code necessary

While this isn't the case with every co-browsing solution, remote browser and proxy-based solutions allow users to co-browse websites without adding code to the site. That means you can use collaborative browsing on your website and any other site on the web, including online apps, without making changes to your website. All you have to do is share a link.

5

Improves customer experience

According to Salesforce's "State of the Connected Customer" report in 2022, 88 percent of customers say "the experience a company provides is as important as its product or services." The report also found that good customer service increases repeat purchases and customer loyalty.

Co-browsing technology provides a new way to offer great experiences that will enhance the customer journey. It enables your sales and support teams to be with your customers every step of the way. It integrates with communication tools like live chat and video conferencing software to provide a seamless omnichannel experience.

6

Fully secure and compliant with leading industry standards

Co-browsing software only shares the browsing session, so it presents less of a security risk. This feature is beneficial for companies requiring a higher level of security due to industry regulations (e.g., companies that must carefully handle personally identifiable information to maintain HIPAA compliance).

For example, Surfly is HIPAA, GDPR, ISO 27001, AICPA SOC, and PCI DSS compliant. We only share the original tab of the browser window, so other tabs containing confidential information will not be visible. We also detect and mask sensitive information like credit card details so that participants can enter their data without worrying about privacy issues.

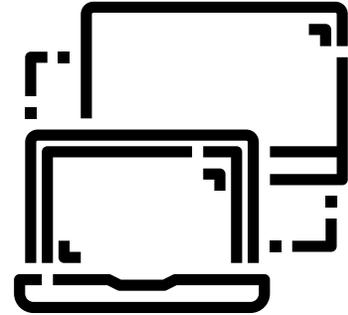
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Records all required interactions - even on third-party websites

With an audit log, you'll have a record of who did what within a session—even if it happened on a third-party website. That means that companies in highly regulated industries like insurance or financial services will remain compliant when their agents co-browse websites.

The limitations of co-browsing technology

Co-browsing solutions are powerful, but they aren't the right fit for every use case. Three limitations will determine whether co-browsing is right for your business.



Setup may be required

While remote browser- or proxy-based solutions do not require setup, embedded co-browsing solutions do need it. Depending on your specific use case, you might need to dedicate resources for setup.

You can't share your desktop

When co-browsing, participants are limited to what the user sharing sees in their browser. To access other windows or applications, you'll need screen sharing.

To circumvent this limitation, Surfily has also added screen sharing within its suite of features.

**It doesn't
work with
outdated
technology**

Embedded co-browsing based on Javascript won't work with older technologies like ActiveX or Flash. For that, screen sharing is the best solution.



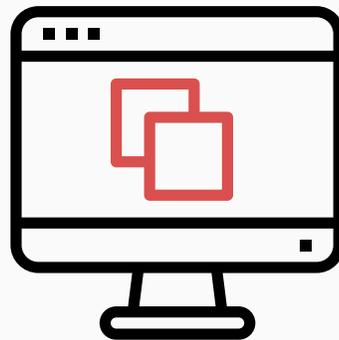
How to choose a co-browsing vendor?

With so many tools out there, it can be hard to find the right one for your business. Here are three easy steps to help you make a decision.

01 Evaluate your needs

What are you using co-browsing for? What are the key elements or features you can't live without?

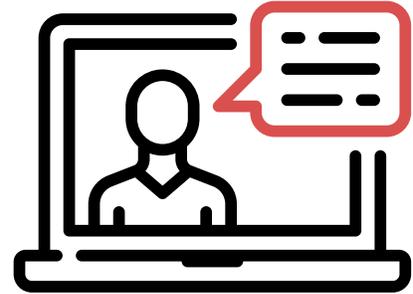
The answers will be different for every business, but some industries have clear dealbreakers. For example, the insurance industry has stringent compliance regulations. Any tools that don't meet these criteria can't be considered.



Here are a few points to consider...

FEATURES

Which features are a must for you? Most co-browsing solutions come with add-on features that support various use cases.



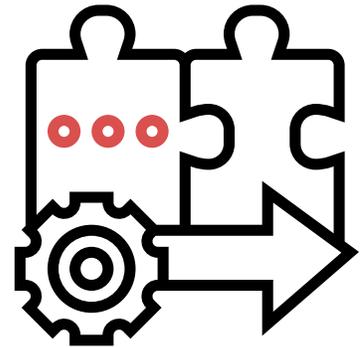
- **Video chat** Are you looking for a solution that enables you to visually interact with users over video chat?
- **Desktop file support** Do you need features that allow you to browse files on the desktop? Then you'll either need a co-browsing solution with a file or document sharing feature, or a screen sharing solution.
- **E-signing** Does your sales flow involve the signing of a document to close the deal? In that case, you could benefit from a solution that has a built-in e-signing feature.
- **Drawing tool** Do you need to explain certain information to users while highlighting parts of the screen? Then a drawing tool might come in handy.
- **Third-party content support** Do you need to co-browse websites that are not your own? In that case, you will need a co-browsing solution with the capability to browse third party websites.

> **Device & Browser Support**

Does the solution support mobile apps on Android and iOS? Does it work as a desktop app? Is it compatible with most browsers? Tools with a wide range of supported devices and browsers are more versatile.

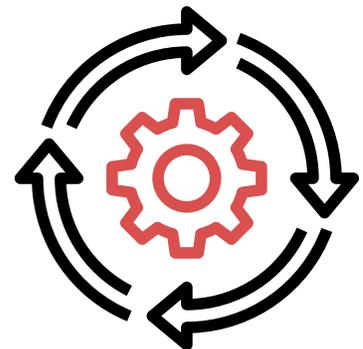
INTEGRATION

How well do the co-browsing tools you're evaluating integrate with your existing communications stack? Will the integration be seamless or will you need to dedicate extra resources to make it happen?



IMPLEMENTATION

How quickly will you be able to implement the solution within your existing flows? For instance, embedded solutions take longer to implement than remote browser- or proxy-based solutions. This can cause a huge drain on your development resources and overstrain your tech team.



Are you looking for a plug-and-play solution? In that case a proxy-based solution like Surflyn is the best choice for you.

SECURITY

This is one of the most essential elements of selecting a co-browsing tool.

Make sure security is a priority for the vendor.

You can do so by checking if they have:



Industry standard certifications

Regular scans/testing

SSO integrations

Encryption

Additionally, check if the tool supports advanced security features like field and element masking, i.e., masking certain sensitive content on the page such as form fields, credit card data, etc.

To deep dive further, you can also ask the following questions to your vendor:

- > How is data handled by the solution between the different participants?
- > Which data is stored and for what purpose?
- > Where is it processed? Do you have control over these entities?
- > Are there features to guard against man-in-the-middle attacks?
- > Are there features to protect consumers' data/logins/private info from the company agents?
- > Are the user logins shared? Where are the cookies stored?

COMPLIANCE

The solution must meet all compliance and regulations regarding the security, auditing, and use of individual data. This is an absolute must in highly-regulated industries. You need to check the specifics of your industry and ensure all your needs are met. Industry certifications like ISO, HIPAA, among others are a great indicator of compliance. Furthermore, you should consider asking the following questions.

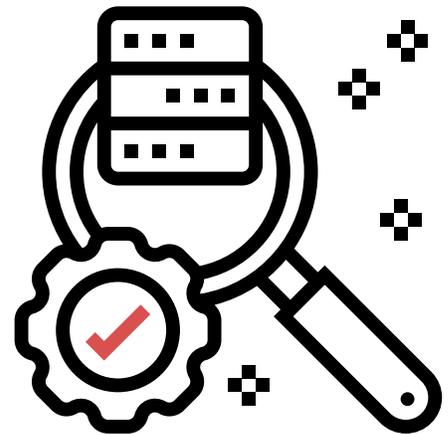


- > Does the solution allow you to audit the actions committed by your users within the session?
- > Is it a requirement that your users' data never leaves your country, location or even your own data centers?
- > Do you need some kind of custom deployment to ensure compliance? Is the vendor able to provide that to you?

SPEED AND QUALITY

Some tools, like co-browsing, are optimized for speed and quality. Others, like screen sharing, generate lag by design. If image quality is important for your use case, co-browsing is the way to go. For instance, you could be in the luxury industry, in which case the apparel needs to look its best on screen, and the original image quality needs to be retained. Only co-browsing can retain the original image quality, as screen sharing will always compress the image, resulting in lower quality.

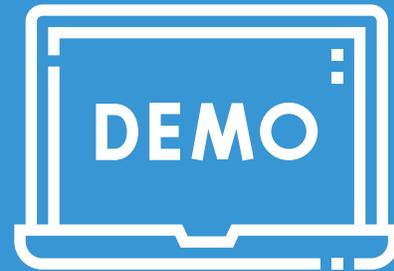
Between the three types of co-browsing, proxy-based co-browsing has the lowest lag and highest quality. This is because the content renders on your own browser and not on a remote browser.



02

Try some tools or book a demo

Finally, once you know what you're looking for and have narrowed your list of potential tools, you should take some of them for a test drive. You can either sign up for a trial or book a demo to get a feel of the tools you're considering.



03

Dive deep

Choosing the right co-browsing tool is about more than features and functions. You're entering into a business relationship with a vendor. Getting this match right is as important as any feature of the digital tools you choose.

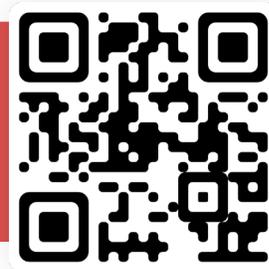


> **Customer service**

Evaluate the vendor's policies like you would any feature of their product. Ask yourself how interacting with them makes you feel. A good vendor will make you feel looked after and understood, not like one client among many.

- > **Cost** The pricing of products varies according to the type of co-browsing and usage plans, and it is important for organizations to pick the best-suited model to avoid massive overspending. Some providers' price plans force organizations to pay for functionality they do not want.
- > **Customer references** What do customers have to say about the vendor? Ask around. Read reviews.

Check out the best co-browsing software on G2



- > **Marketing value of your vendor partnerships** Does the vendor in question offer something cutting-edge that you'd be excited to announce on your blog, or are they just helping you fulfill a basic need? There's no right or wrong answer here, but it's worth thinking about whether you're looking for innovative technology you can brag about or just trying to get the job done.

Does your business **need** co-browsing software?

Co-browsing software can create an engaging, omnichannel experience. If you're looking for a simple way to enable your team to make more powerful connections with your customers, this robust visual engagement tool is one to consider adding to your tech stack.



About Surfly

Surfly powers more than 200,000 users across leading organizations, including AXA, Tripadvisor, Achmea, Generali Group, Empire Life, and Chanel to deliver a world-class digital customer experience. Headquartered in Amsterdam, we are the world's leading provider of Universal Co-browsing.

Ranked as the co-browsing market leader on G2



Ranked as a global leader in visual engagement by Frost and Sullivan →



Trusted by some of the world's best



Talk to an expert

