

CASE STUDY

Intelligent personalization and unified enterprise search improves CX while saving millions

EXECUTIVE SUMMARY

Who

Fortune 1000 global cybersecurity company

Goals

Improve customer support delivery while decreasing costs

Challenges

Siloed data

Solution

Intelligent personalization and unified enterprise search

Technology partner

Coveo

Results

50% case deflection rate resulting in savings of \$2.5 million, 69% CTR on AI-driven content recommendations

“iTalent's expertise of delivering deep and seamless integrations across our cloud platforms essentially provided "one" experience for our customers and employees, which drove value and adoption that could not have been realized through a siloed cloud experience.”

Strategic Digital Marketing and Online Community Leader

CHALLENGE

As a cybersecurity company, our customer's business depends on delivering an exceptionally high level of customer support. With customers in more than 150 countries, support cases were costing the company tens of millions of dollars per year and growing. They knew that the way to keep up with the swelling support case load was not simply to continue hiring more tech support engineers. The company had an online community to help customers self-support, but a lot of relevant information was siloed across disparate enterprise properties such as the corporate website, the employee intranet, the help portal, and the user community, which impeded a ready access for both the users and the support engineers.

SOLUTION

In partnership with Coveo, iTalent Digital consolidated our customer's disparate data repositories via seamless integrations and implemented a machine learning and AI-empowered personalization, search and recommendations engine that not only finds relevant information no matter where it resides and serves it up to the user no matter where in the ecosystem the search is conducted, but it also intelligently delivers proactive, "predictive" recommendations based on search intent and the past behavior of the broader body of users.

KEY DELIVERABLES

Unified search on web properties

Intelligent personalization and unified search were deployed on all the company's web properties, so that no matter where users are in the company's online ecosystem, they now have easy access to all relevant content repositories via a single search.

The search engine uses AI and machine learning to make intelligent recommendations based on the user's own search intent, as well as on the search history of the broader body of users. The recommendations include not only content that the user is most likely interested in, but search queries themselves are also suggested as the user is typing in the search terms, based on the understood intent of the user. Over time, search is becoming almost unnecessary in an environment where the recommendations engine is predictively and proactively presenting content to users based on their past interactions and the history of similar users.

KEY DELIVERABLES

Unified search on the customer support portal

Unified search is activated in an ever-present search box in the customer support portal (CSP). It is also leveraged to provide suggested solutions as a means of case deflection while customers create support tickets online. The intelligent recommendations engine suggests helpful content dynamically based on the information written into the case creation form. If a user clicks on recommended content and leaves the form before hitting the “submit” button, it is counted as a case deflection. All of these features are displayed in responsive design, making them usable regardless of form factor (e.g. laptop, tablet, or phone).

Unified search on the employee intranet

Intelligent personalization and the unified search engine were also deployed on the employee intranet. Now employees can instantly and easily find the information they need to do their jobs, no matter where in the enterprise ecosystem it resides. Previously, sales engineers would email product management when researching the latest product offerings or responding to RFPs (requests for proposals from potential customers). Now, they have an interactive form on the intranet. As they fill out the form, intelligent recommendations are automatically offered up as potential answers, thus “deflecting” a lot of emails to the product managers while offering more immediate service to the sales engineers.

Unified search on Slack to assist support engineers

Unified search was also integrated with Slack. As part of the “case swarming” practice, when agents initially spin up a Slack channel to swarm or collaborate on a support case, intelligent search provides an initial list of content from the knowledge base based on the case subject while the agents wait for the rest of the team to join, speeding up case resolution.

“The close collaboration and partnership between Coveo and iTalent Digital was evident, and was demonstrated by a smooth delivery of an on-time, on-budget implementation.”

Director of Online Services, Global Customer Support

Unified search within the knowledge base and TAC console

Personalization and unified search were implemented within the knowledge base, which in turn was integrated with the company’s products (so, intelligent unified searches are now conducted from within the help function inside the product environments), and the entire knowledge base repository was migrated over to Salesforce Knowledge. The technical assistance center (TAC) console was enhanced to leverage the Coveo “insights panel” to enable relevancy transformation and unified search in both the agent console and in the creation of knowledge assets. The TAC agent console now has an intelligent recommendations function similar to what is on the customer support case creation form. As agents are typing case notes into Salesforce, the recommendations engine dynamically and instantly recommends relevant content that can help resolve the issue. So, information is intelligently surfaced for the agents without their having to do anything differently or proactively search for it. For the knowledge asset creation, a one-click process was created, whereby an agent can click on a button to create a new knowledge asset if the perfect answer to the question at hand does not currently exist in the knowledge base.

Role-based search

iTalent drew on its world-class DevOps team to enhance the search and recommendations engine with an innovative role-based search functionality that customizes both the content surfaced and the arrangement of the content on the page according to the permissions the specific user has; for example, according to whether they are logged in or not, and if they are logged in, what permissions they have to access content. As a result, employees searching on the community can see content sourced from the employee intranet, whereas customers conducting the same search would not be able to access that content. In other words, restricted content can now be crawled by the search engine and still kept secure by only being surfaced to authorized users.

Change management

A change management wrapper was placed around the entire transformation initiative to ensure sustained adoption of the new tools by employees and TAC engineers, delivered by iTalent Digital's award-winning Change Management Practice.

RESULTS

By every measure tracked by the company, the solution has been a resounding success. The recommendations engine applied to the support case creation form began yielding results immediately, and within 18 months attained a 50% deflection rate, where just as many cases were deflected as opened. This alone represented a savings of almost \$2.5 million.

Customer self-service also surged. The click-through rate on search results more than doubled in the first 18 months, with machine learning-driven recommendations reaching a 69% CTR, with about 60% of these clicks being on the search query results and another 40% being on the recommended content. This indicates how well the intelligent search engine was getting at predicting what a user really wants to see (even if it doesn't match the search term).

Another metric used to track self-service are the self-service sessions and unique user trendlines. After deployment the gap between these trendlines expanded, meaning that the number of self-service sessions grew faster than the number of unique users in the community, demonstrating that users relied more and more on the self-service option.

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“Transformational things don't always go easily and [it] was strikingly and shockingly easy for us to go ahead and deploy this and make it happen. We've been thrilled with the experience.”

Strategic Digital Marketing and Online
Community Leader

SUMMARY

iTalent's intelligent personalization and unified enterprise search solution has delivered tangible benefits to every part of the company. From the finance perspective, it delivered revenue and profitability; for sales, a seamless customer journey from the time a user discovered the company all the way through to post-sale support. From a customer service perspective, the company has ambitious goals of 80% case deflection and 100% customer satisfaction scores (which they are on their way to achieving thanks to AI, ML, and a strong commitment!). From a marketing perspective, it created a unified view of the company for customers. And for customers, they now have a seamless, coherent, and harmonious experience with the company at every touchpoint.

ABOUT ITALENT DIGITAL

iTalent Digital is a global woman- and minority-owned software engineering and full-service tech consulting company headquartered in Silicon Valley that champions the people side of tech. We help companies achieve exceptional business outcomes through a suite of digital transformation services such as enterprise collaboration, personalization and unified search, business insights and analytics, cloud and software development, and Change as a Service (CaaS).

The team has numerous awards to its name, including 25+ Stevie® Awards, two Forrester Groundswell Awards, five Khoros Awards, two Globee® Disruptor Company of the Year Awards, two Cisco Responsible Procurement Awards, and many others.

