

Coveo Platform: Version 6.5

Enabling Greater Insight Across the Enterprise

The Coveo Platform version 6.5 solves challenges associated with data proliferation in increasingly disparate and siloed systems. While data grows exponentially in size and diversity, companies are marketing increasingly complex and varied product lines. The Coveo Platform version 6.5 forms a virtual insight layer above all enterprise systems, as well as social media and communities, providing insight into customers, prospects, projects and product engineering efforts. This insight yields a deeper understanding that improves customer service, sales and marketing efforts and product innovation.

Coveo Insight Solutions, the confluence of Enterprise Search 2.0, Knowledge Management and Customer Experience Management, help companies to better know and serve their customers by harvesting additional value from their existing IT infrastructures, extending the life of many systems and reducing the need to move data or integrate systems.

Examples of business uses that provide critical customer insight include:

- ▶ Customer service and support
- ▶ Sales and marketing
- ▶ Product development/engineering
- ▶ Self-service information navigation on websites
- ▶ Dynamic business analytics

Coveo Insight Methodology

The Coveo Insight Methodology provides a set of repeatable best practices which, when combined with the technical building blocks of the Coveo Platform, enables businesses with actionable insight on their customers, people, products, and more.

Coveo Insight Solutions take users through the



four progressive levels of data interaction to gain insight:

1. Search & Navigation, with SmartFacets™;
2. The automatic Consolidation of relevant, near real-time information;
3. The Correlation of any-to-any relationships as well as the discovery of themes within massive amounts of data; and
4. The ability to Analyze data in real time, providing dynamic, interactive analytics around customers, cases, sales, products, and more.

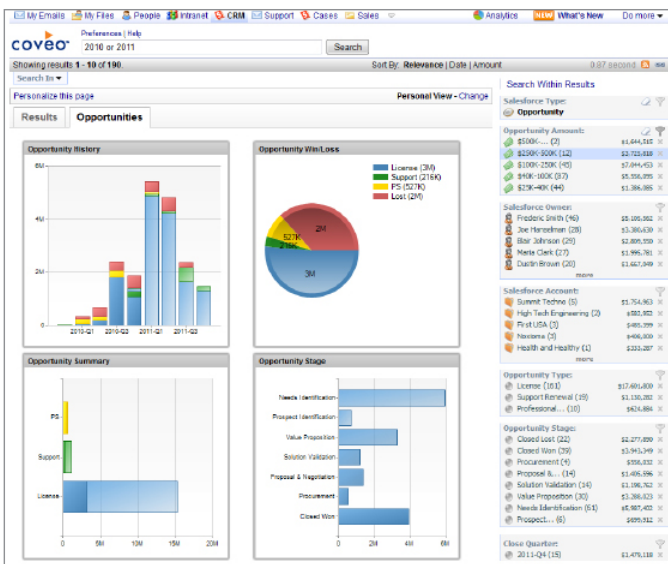
Search and Navigate

Utilize dynamic navigation and user-controlled relevance to find information across multiple silos, quickly and easily.

Coveo's user interfaces come in a variety of formats which can be configured to meet specific user needs and to seamlessly mesh with and optimize existing business processes.

- ▶ Interfaces include Insight consoles, Desktop Search Bar, Outlook Sidebar, Mobile and Web Interfaces.
- ▶ All of Coveo's intuitive interfaces provide a conversational experience with unified information from disparate systems. Coveo SmartFacets™, included with all interfaces,

provide at-a-glance numerical and graphical summaries of important data, such as consolidated contract amounts for sales, marketing or services. Unique navigational features include contextual summaries in results, dynamic navigational facets, pop-up Quickviews of documents, highlighted keywords and phrases, folding conversation threads for email results, and many other ways to drill-down and converse with the unified information.



SmartFacets™ enable advanced analytics, with dynamic calculations across disparate data sources, by context and level-of-detail

Consolidate

Coveo consolidates and enriches information, normally only found in multiple systems and interfaces, to provide insight in unified, composite views. This eliminates the need to retrieve information from each of these multiple systems, via multiple interfaces, and results in reduced costs, improved capacity and increased customer satisfaction.

- ▶ Data normalization reduces redundancy and provides a clean data set for information access. Differing representations of data from across systems, such as accounts, can then be viewed as one consistent entity regardless of the originating system.
- ▶ Enriching existing data with additional metadata opens up a variety of possibilities. Data can be

analyzed, then automatically augmented with metadata extracted from other systems to provide increased intelligence. For example, data extracted from a project management system may be added to other employee data to create an implicit expertise finder.

Correlate

Correlation capabilities mean that related data, even across multiple systems, can be identified by Coveo's correlation engine to provide users with various forms of value-added information relationships. This automated process provides insight that would otherwise remain undiscovered or take hours to research.

Coveo's Unified Index automatically creates virtual links between "like" data, allowing suggestions for "next best action" based on related data that yield actionable insight in a variety of business processes.

- ▶ Users can easily determine root causes of issues, or issues having similar symptoms, to aid in speeding resolution.
- ▶ Sales opportunities that may be at risk due to outstanding product or support issues can be highlighted.
- ▶ Enriching existing data opens up a variety of possibilities. Data can be analyzed, then automatically augmented with metadata extracted from other systems to provide increased intelligence. For example, data extracted from a project time-tracking system may be added to other employee data to create an implicit expertise finding capability.

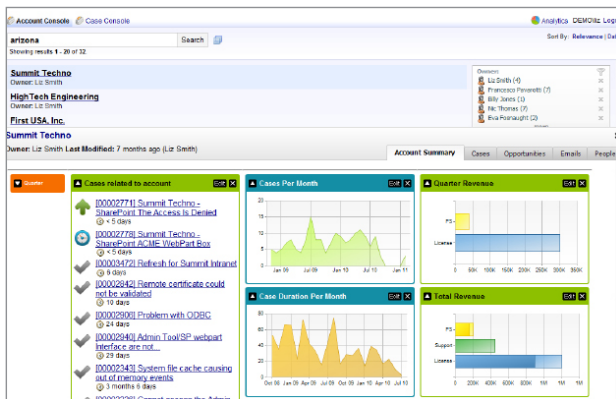
Analyze

Coveo Analytics allows users to dynamically extract meaning from information, yielding insight normally only gained through complex, time-consuming report generation. Dynamically aggregated from disparate sources, this information - in both graphical and numeric formats - identifies and tracks both operational and business trends.

- ▶ Identify and proactively address customer

issues that may impact satisfaction

- ▶ Track operational metrics that aid in resource and capacity planning
- ▶ Spot trending product issues and their potential adverse impact on sales opportunities



Coveo Dashboards offer new and consolidated perspectives on your organization's information

The Coveo **User Interaction Analytics** module provides information that helps administrators optimize their search applications by analyzing the paths users follow while searching and navigating results, which are the most popular searches, failed queries, etc. By tracking and understanding user behavior by segment, organizations can better determine users' requirements, identify content gaps, and optimize performance – ultimately increasing both adoption of and benefit from the Enterprise Search 2.0-powered solution.

Coveo Insight Consoles

Coveo Insight Consoles provide users with role-specific, consolidated and correlated information as well as dynamic operational and management analytics to support faster, better decision making in every area, with improved insights.

- ▶ Insight consoles, for users such as support agents, sales executives and engineers, provide product, customer and prospect insights that eliminate time consuming, manual information retrieval and manipulation from multiple, disparate systems.
- ▶ Management analytics, via dynamic, interactive dashboards, offer business users insightful, complete perspectives.

- ▶ Coveo SmartWidgets™ can be easily and quickly configured by both end user and the administrator to display and provide interaction with content ensuring a personalized, relevant experience that reflects how the user prefers to interact with the information.

Platform Components and Configuration

The Coveo Platform version 6.5 provides flexible, scalable and secure Enterprise Search 2.0 capabilities through a number of underlying components that leverage a unified index to enable search and navigation, consolidation, correlation and analysis of enterprise information from disparate sources

The Unified Index

At the core of the Coveo Platform is the central, Unified Index, which constantly gathers updated information from virtually any enterprise system, behind the firewall or in the cloud. The Index quickly unifies information from existing data sources without requiring data movement or investments in costly integration projects.

The Unified Index, due to its always-on nature, is continuously up-to-date, ensuring the latest dynamic content and enabling monitoring and alerting for content and security updates.

- ▶ High performance, scalable deployment, including high-availability configurations are enabled through our unique slice and mirrors architecture, which can be hosted locally or on separate servers through IP connection.
- ▶ **Geographically Distributed Indexing**
 - Coveo supports Geographically Distributed Indexing (GDI), where queries are sent and results are federated to multiple remote index servers, merging the results into a single, page while preserving all the relevancy information required to rank results coming from different sources.
 - Staging Indexes are also available for administration, testing and configuration purposes, enabling a secure and uninterrupted passage to a full production environment.

Interfaces

Coveo interfaces can be configured to meet the information insight needs of any department within your organization.

- ▶ Always available at the top of the desktop screen, or triggered using a hotkey combination, the **Coveo Desktop Search Bar** “floats” above any open application, allowing users to search and navigate from anywhere in Microsoft Windows.
- ▶ The **Coveo Outlook™ Sidebar** provides users with the ability to find information from any source within or outside of MS-Exchange quickly and accurately, right where they spend much of their time – seamlessly integrated in the Microsoft Outlook interface.
- ▶ The intuitive **Coveo Web Interface** provides a customized, unified view for users to search and navigate across unified enterprise information assets from their favorite browser.

Custom Interfaces, designed to meet specific user needs, can easily be developed by leveraging the **Coveo Access API's**.

Coveo **Mobile Interfaces** provide ubiquitous customer information via cutting-edge smartphones and tablet PC's, from virtually any enterprise system, including emails and files from offline PC's.

- ▶ Support for the iPhone, iPad, Android and Blackberry (including OS 6).
- ▶ Purpose-built iPhone mobile application with full support for Customer 360 dashboards.
- ▶ Seamless user experience with guided navigation provided by SmartFacets™, document quickviews, and more...
- ▶ Mobile Dashboards provide business analytics and decision support “on-the-go.”

With Coveo's mobile capabilities:

- ▶ Sales teams leverage up-to-date Insight to truly know all aspects of a customer relationship, even in the minutes leading up to a critical meeting.
- ▶ Field services personnel can access related case resolutions and documentation that allow them to solve customer issues more quickly

and accurately, better serving their customers.

- ▶ Resulting improvements in customer satisfaction lead to opportunities for increased sales and service offerings.

Unified Index Components

Through a broad array of purpose-built Connectors, Coveo integrates with each enterprise system's native security to ensure appropriate role- and rules-based permissions when accessing information.

- ▶ Developed and tested in-house, Coveo Connectors provide superior functionality and integration, as well as adding deeper system-specific capabilities.
- ▶ Integrated with the underlying security model of each system, with a flexible API to support additional integration.
- ▶ Well-connected – Coveo can offer connectivity to virtually any enterprise system.

Coveo's configurable connector architecture and tools support the fast creation of custom connectors, even for legacy and proprietary systems. Coveo's Unified Index is highly efficient, typically occupying 20-30% of the size of the original content, taking up the industry's smallest server footprint.

Conversion Modules provide powerful document and data processing capabilities that extract concepts, summaries and metadata. Converters also allow the injection of additional metadata, even from other content sources, to be added to content during indexing.

- ▶ Language converters enable language detection and processing for more than 40 languages via three language pack options: European, Arabic, and Asian Languages.
- ▶ An OCR converter enables the indexing of text contained within images or scanned documents.
- ▶ A multimedia converter enabling the indexing of voice content from multimedia files, featuring a patented, intelligent transcription technology trains the speech-to-text engine. The result is a higher quality transcript over plain speech-to-text recognition, which becomes searchable as part of the unified index.

Powerful Relevancy Ranking and Social Search

The Coveo Platform version 6.5 provides a broad array of optimized, out-of-the-box relevancy ranking rules that can be easily tuned and configured, via the administrator interface, for highly contextual insight. Implicit and explicit social ranking provides automatic, continuous improvement of results based on user behavior and feedback, without administrator intervention.

- ▶ Relevancy ranking criteria are easily adjusted and customized by administrators.
- ▶ Automatic query suggestion and correction.
- ▶ Custom administrator-managed thesauruses.
- ▶ Contextual excerpts and intelligent summaries.
- ▶ Create query-specific Top Results or Best Bets.
- ▶ Social ranking capabilities employ both automated, self-learning capabilities as well as a rating system that directly solicits user feedback.

Administration Tools

The Coveo Platform version 6.5 provides an intuitive, feature-rich UI for easy administration. Administrators easily deploy additional users, monitor and create alerts on important system events and schedule automatic maintenance tasks. Coveo's API Toolkit allows for the custom development of administration functions and their integration into external systems.

Administration tools include:

- ▶ Interface editor to customize the look and feel of search interfaces, dashboards and results presentation.
- ▶ Super User Access manages the security rights that allow authorized users to search across the entire Unified Indexing Layer to support discovery and compliance initiatives, with full auditing capabilities.
- ▶ Customizing default preferences, enabled features and SmartFacets™.
- ▶ Management of metadata mapping, thesauruses, connector parameters, access

rights, source and collection definition, configuration parameters.

- ▶ Definition of scopes, hubs and audiences.
- ▶ Customization and fine-tuning of the ranking parameters.
- ▶ Scheduling of routine tasks such as backup and index optimization.
- ▶ Reporting capabilities on indexing, queries and other system usage.
- ▶ Configuration of Super User security privileges.
- ▶ Monitoring and alerting on system events, content and security changes.

The Enterprise Search 2.0 Coveo Platform version 6.5 is widely recognized as highly flexible to deploy and administer.

Scalability and Performance

The Coveo Platform version 6.5 meets the most demanding requirements – scaling to more than 50 million documents per server, more than 1 billion documents and returning highly relevant insight in sub-second times.

- ▶ Mirrored indexes and network load balancing (NLB) guarantee high availability.
- ▶ Distributed indexing with index “slicing” provides improved performance and hosting flexibility
- ▶ The addition of federated search along with geographically distributed indexing allows for flexible deployments that optimize performance for remote locations, distributed content and network loads.

Due to a small, optimized footprint of indexed data, Coveo requires minimal hardware for implementation.

Join the confluence of Enterprise Search 2.0, knowledge management and customer interaction

Contact Coveo today for more information including a live demo of Coveo Insight Solutions.