



## CA Technologies Increases Customer Centricity with Coveo Insight Solutions

CA Technologies, an IT management software and solutions company, helps customers optimize IT for better business results. CA Technologies’ goal is to be the strategic partner customers rely on to adopt new technologies, while also realizing the most value from their existing IT investments. A customer-centric strategy—or placing the customer in the center of its business—is key to achieving this goal, thus making CA Technical Support the lynchpin in helping customers realize the full value of their investment in CA Technologies.

To deliver on this goal and increase customer centricity, CA Technologies was looking for ways to further improve overall customer service engagement across all channels—including its online, self-service channel. The company wanted to provide a consistent customer experience, improve overall satisfaction rates, while at the same time increase the efficiency and productivity of its call center agents and reduce costs, all without adding headcount. CA Technologies was also looking for a way to better share this information across teams and geographies, so that all CA employees would have access to critical customer information to facilitate customer engagement across sales, marketing, R&D and support.

### CA Technologies in Numbers:

- ▶ 13,000 employees
- ▶ 1,000 support professionals
- ▶ 190,000 customers
- ▶ 400 products
- ▶ 360,000 cases per year



### Business Goals:

- ▶ Optimize the overall customer service experience.
- ▶ Reduce call center operation costs while increasing capacity.
- ▶ Increase customer satisfaction and improve online customer self-service.
- ▶ Increase cross-departmental collaboration to increase customer engagement.
- ▶ Scale support operations to keep pace with continued corporate growth, while reducing costs.

### Results at a Glance:

Time to customer service case resolution	🔴	15%
Customer self-service satisfaction	🟢	10%
Number of cases opened online	🟢	41%
Issue volume (same capacity)	🟢	8%
Technical staff headcount	🔴	5%
Overall customer satisfaction	🟢	40 basis points

## Coveo Customer Success Story

### CA Technologies Increases Customer Centricity with Coveo Insight Solutions

Leo Annab, business technology officer, CA Technologies, is a business and transformation officer within the company's R&D organization responsible for bringing new and innovative solutions to the marketplace. He previously ran global technical support for CA Technologies.

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Leo Annab  
Business Technology Officer  
CA Technologies

Annab commented, "In order to increase customer centricity and further improve our support operations, we realized we needed to get a better handle on the ever expanding amount of customer, product and people information that was accumulating across customer interaction channels—emails, voice, communities, and our online, self-service. In addition, we were developing and introducing new, cloud-based solutions to the marketplace, which required our Technical Support team to quickly learn how to support these new products. Developing new cloud solutions was a significant milestone for our company—but these innovations also presented challenges for the team to learn how to support this new way of delivering technology that was very different from our more traditional solutions."

He continued, "So not only was the amount of customer information increasing across channels, but the complexity and amount of products we were supporting was also increasing. It was critical to ensure we were sharing customer information not only within Technical Support, but also across R&D and sales and marketing, as well as making it accessible to our customers through our online, self-service support site. Critical product issues, customer feedback, enhancement requests, and more, were being captured

in Technical Support—information that would greatly benefit our R&D, sales and marketing teams—so that they could better develop, market, and sell our solutions."

Information about its expanding products and services portfolio, customers (including those from newly acquired companies), projects, people, and more, was contained in more than 70 different systems as well as across social channels, making it difficult for Technical Support and all employees to find, consolidate, and correlate information from across interaction channels and content sources. The growth in size and complexity of information and systems was becoming difficult to manage—and was growing in silos and among teams, with no real way to share it across the business.

#### Coveo Insight Solutions for Customer Service

Annab commented, "We needed a way to break down information silos and better consolidate, correlate and share critical customer information across our Technical Support team, as well as across R&D, engineering and sales and marketing. We also needed an easy to use, online customer self-service solution that would quickly connect customers with relevant information to resolve their technical questions. Not only would this improve the customer experience, it would help deflect expensive calls into our call centers and increase overall agent productivity."

As part of its selection process, CA Technologies based its evaluation on ease of deployment, configuration, and administration, the ability to easily configure the user interface by role, and anticipated benefits and ROI.

*"We needed a way to break down information silos and better consolidate, correlate and share critical customer information across our Technical Support team, as well as across R&D, engineering and sales and marketing—essentially all CA Technologies employees. We also needed an easy to use, online customer self-service solution that would quickly connect customers with relevant information to resolve their technical questions."*

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CA Technologies worked with Coveo to deploy a Proof of Concept (POC) on its data, in an effort to see first-hand the power of Coveo's unified indexing technology. While other considered solutions ran into difficulties, Coveo easily indexed all of CA Technologies' data, regardless of where the data resided, onto the Coveo unified indexing Platform. Coveo had CA Technologies up and running within a week.

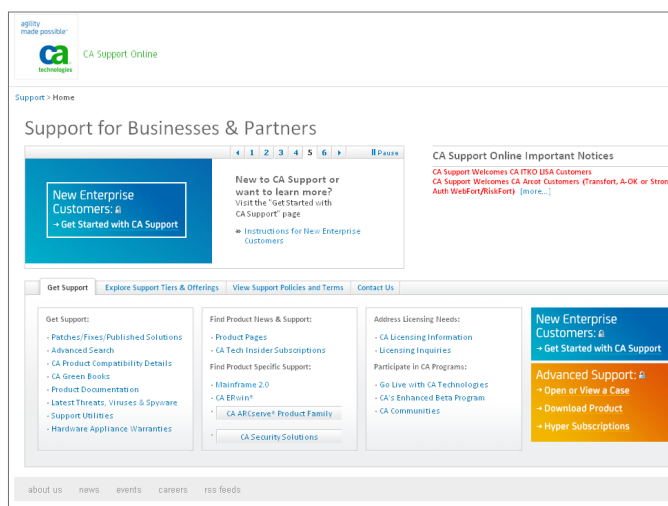
At the end of the evaluation, Coveo clearly won hands-down by offering the most powerful, and intuitive solution for CA Technologies to index all its data on a single platform, and provide, through Coveo Insight Consoles, dashboards of information mash-ups from across channels—all configured by role, while respecting pre-defined security permissions of the data.

CA Technologies began by empowering its contact center agents with Coveo's unified access to its ecosystem of customer information—which is contained in 74 different systems. Coveo's unified indexing technology creates structure within information where none exists, across systems and across customer interaction channels. The Coveo Platform connects with and pulls information from basically all enterprise and social systems to create a virtual integration layer which constantly pulls the latest information from all systems so is always up to date. In this Unified Index, Coveo enriches the data, consolidates and correlates it, and discovers information relationships to help agents, managers and executives uncover valuable insight into their customers.

*"Coveo currently ties together internally 74 different systems—and we can now look at that information in a more meaningful way."*

Leo Annab

With Coveo, CA Technical Support can easily find information from across all of these disparate systems, and resolve issues faster and more accurately. Rather than piecing information together from multiple systems and interfaces, Coveo provides consolidated knowledge access and intuitive capabilities to pinpoint precise information quickly. Improved access to knowledge provides agents with the information to provide rapid, complete resolutions during the first customer contact—easily finding similar issues and their resolutions.



CA Technologies customer self-service website, powered by Coveo.

## The Results

After its initial success across Technical Support, CA Technologies expanded its use of Coveo. Today, all 13,000 CA Technologies employees are using Coveo. Annab said, "Coveo helps CA Technologies in a number of ways. Coveo currently ties together internally 74 different systems—and we can now look at that information in a more meaningful way. Because we have information all over the world across these systems that carry information that's important to sales, marketing, services, support, and development, it's important that anyone at CA that needs any bit of information, whether technical, product or customer information, be able to easily and quickly get at that information to the extent that they have the rights to."

He continued, "Coveo is also powering our customer self-service site. We've created one, single integrated search engine for our customers which has helped us tremendously. The customer experience on our self-service site has improved dramatically since Coveo. Coveo has helped tremendously in terms of customer satisfaction by helping customers looking for solutions to problems. Coveo has been extraordinarily valuable."

For CA Technologies, Coveo is now indexing 14 million documents across 74 systems for 13,000 employees, who are conducting 100 searches per minute. On its secure, customer self-service site, Coveo is indexing 1.2 million documents for 150,000 users who are conducting 1,000 searches per minute.

## Coveo Customer Success Story

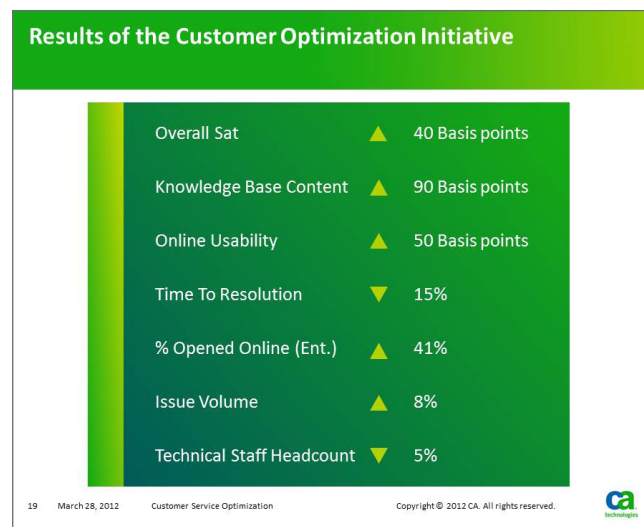
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From disparate data to actionable insight, Coveo now provides all 13,000 CA employees with always-fresh data about customers, projects, and people, across enterprise systems, and social communities.

Coveo is used across its call center operations as well as its self-service customer information Web site. During a Gartner webinar, Annab presented the following results now that agents have better insight into all relevant customer information, issue resolution information, and more—across all interaction channels:



"All of this was accomplished during a period when we experienced an eight percent increase in complex issue volume, in part due to the introduction of our new, cloud-based solutions, while at the same time we were able to reduce our technical staff headcount by five percent," said Annab. So they were able to increase capacity, reduce costs, and increase customer satisfaction at the same time – until now, these were diametrically opposed goals.

"Previously, when someone asked us for distribution of our cases by year, or for the names of the top 20 customers who have had technical problems in a certain location, we'd have to run a time-consuming database query report," commented Annab. "Now, this information is at our fingertips, near real time."

*"My experience with Coveo from a customer service and partnership perspective has been very good. Coveo has been very responsive to our needs. They've helped us along the way, showed us use cases of their technology that we hadn't thought of before and have been a great partner."*

Leo Annab

The CA Technologies self-service website is also generating efficiencies and cost savings across the organization. The improved speed and accuracy is having a positive impact on customer satisfaction. Customer issue resolution has sped up dramatically, and customer self-service satisfaction has grown by an impressive 10 percent.

"My experience with Coveo from a customer service and partnership perspective has been very good. Coveo has been very responsive to our needs. They've helped us along the way, showed us use cases of their technology that we hadn't thought of before and have been a great partner," Annab concluded.

#### See Coveo Insight Solutions in Action

[Arrange for a proof of concept](#) on your own data to see first-hand how Coveo Insight Solutions for Customer Service can increase customer centricity in your organization.