



# Deltek Uses Coveo to “Know More. Do More.” A Story of Customer Service Transformation.

## Snapshot:

- ▶ **Industry:** Software & Internet
- ▶ **Geography (HQ):**  
Herndon, Virginia, USA
- ▶ **Types of Users:**  
Customer support agents and clients
- ▶ **Coveo Solution:**  
Coveo for Customer Service
- ▶ **Connector Types:**  
Web, Databases (ODBC), MS  
SharePoint, Salesforce, Windows  
File Share, Active Directory, and  
Coveo’s API Connector Services



## Client

Deltek, Inc. is the leading global provider of enterprise software and information solutions for project-based organizations, professional services firms and government contractors. Approximately 16,000 organizations and two million users in over 80 countries around the world rely on Deltek to research and identify opportunities, win new business, optimize resources, streamline operations and deliver more profitable projects.

For decades, Deltek has delivered actionable insight by monitoring and analyzing all critical information that empowers its customers to unlock their business potential. With a variety of knowledge and data sources available, Deltek needed a way to harness this information more effectively to provide clients with the knowledge and information they need to be successful.

## Challenge

Deltek provides customer care through two primary channels: customer care agents and Customer Care Connect, an online customer self-service portal which includes user forums. The company’s strong business growth and stream of new product launches resulted in the need for its customer service organization to scale its ability to serve customers without considerably increasing its support staff. To do that as well as ensure that it continues to deliver outstanding support to its customers, Deltek wanted to improve its customer self-service channel and enable its customer care agents to assist clients more effectively.

### Learn more and request a demo:

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# Coveo for Customer Service

## Business Goals:

- ▶ Provide a unified source of information for employees and customers, making accurate and actionable information easier to locate
- ▶ Increase customer satisfaction by improving self-service functionality
- ▶ Expand capacity through higher case deflection

“Essentially, we help government contractors operate more efficiently on a day-to-day basis — everything from managing their finances at a project level to helping them capture and win new business,” said Brian Daniell, Senior Vice President, Customer Care. “If something happens to their environment or system that causes a significant interruption, it’s important that we provide them with the best content available, immediately, on our customer support site.”

At the time, Deltek was using RightNow Technologies as its support CRM tool which contained a search engine that allowed customers to search Deltek’s knowledge base only. With the current CRM system

indexing information from only one place, Deltek soon realized that its ability to put content and new sources of knowledge into the hands of customers had become a challenge.

Specifically, a key source of information that wasn’t being indexed was Customer Care Connect, Deltek’s award-winning online self-service portal, which provides useful written materials to customers. This also meant that the knowledge exchanged on its popular user forums within the online self-service portal, where 20,000 users go to ask one another business questions or compare notes on what they’ve done previously, was not easily findable.

**“We built this great support website over time and added content, then digital sources of data, for our customers to help them with their business. However, what we found was that some information was just too hard for customers to find, or it wasn’t reasonable to expect them to go to four different places to search for the material they needed.”**

— Brian Daniell, Senior Vice President, Customer Care, Deltek

“Our customers had to search multiple sources to resolve their issues, and relevant articles became harder to find, impacting their user experience. We had multiple sources of data across the company that was simply not being utilized,” said Daniell. “At the same time, our customer self-service metrics had reached a plateau,” he added.

## Selection & Implementation

“We needed to take our site to the next level and increase self-service. We spent the last few years building up the capabilities of our site, and increasing the content that was there. We just needed a way to make it easier for customers to find that content. In order to do that, we knew we had to make world-class tools available to them,” Daniell added. The company already had a positive experience using Coveo with an acquired company which utilized Coveo as a customer-facing search engine.

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## Results at a Glance:

- ▶ Double digit increase in activity and registration in Deltek’s customer forums
- ▶ Improved online customer satisfaction by nearly 2 points since implementation, collectively a rating of 93.4% (top 3 box score)
- ▶ Increased contact center capacity
- ▶ Case resolution time decreased by 20%
- ▶ Users are now able to locate the information they need more quickly, thereby improving resolution time and increasing client satisfaction, as well as driving down transaction costs



Still, as part of their due diligence, Deltek evaluated a number of vendor solutions and found that Coveo was the best match for this initiative based on the superior functionality and cost of its solution, in particular its ability to quickly integrate with third party sources critical to customer care and provide a purpose-built search console for customer care agents.

**“We have been very happy with Coveo — before, during and after the implementation. We view our relationship as a partnership that will enable us to easily add other sources of data and capabilities in the future, both internally and externally.”**

— Brian Daniell

## Results

Since deploying Coveo, activity and registration in Deltek’s customer forums have increased by double digits. Daniell attributes this growth to the Coveo implementation — the more customers that are part of

the online customer forums/communities, the more people there are to help one another and share their collective knowledge. This also increases customer retention and loyalty, making it more likely customers will purchase again in the future. Daniell concluded by saying, “We believe Coveo makes our portal that much better and sets us apart from the competition.”

**“Most of the time, no news is good news when it comes to your customer base. Fortunately, we hear from our internal support team that it’s now much easier and faster for customers to find the solutions they need than it was pre-Coveo.”**

— Brian Daniell

The ability to provide customer care agents with a unified view of content across multiple systems using Coveo’s solution has also given agents better insights into the customer’s profile, needs and available solutions, enabling them to provide more effective support to clients.

## Next Steps

Deltek will be exploring more indexing options with Coveo in the future. Part of this thinking includes Deltek University, which provides content to customers who are attending training classes. Indexing that content would help customers understand what classes are available, and place all relevant information accessible via one simple search.

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