

Global Leader in Energy Management Uses Coveo for Salesforce to Cut Case Resolution Time and Increase Agent Productivity

Snapshot:

- ▶ **Industry: Energy & Utilities**
- ▶ **Geography (HQ): France**
- ▶ **Types of Users:** Customer Support Agents – L1 (Primary), L2 (Advanced) and L3 (Expert)
- ▶ **Coveo Solution:**
Coveo for Salesforce - Service Cloud Edition
- ▶ **Connector Types:**
Current: Lotus Notes, SharePoint, Network File Shares, PeopleSoft/Vantive Jupiter, Proprietary Databases (including the company's product catalog and FAQ repositories)
Future: InQuira
- ▶ **Content Indexed:** MS Office documents, pdfs, knowledge base records, FAQ records, images



Client

A global leader in energy management serving multiple market segments and operating in more than 100 countries, the company has been transforming the energy management industry with its emphasis on innovation, corporate responsibility and diversity, supported by a customer-centric approach.

Challenge

With its commitment to service excellence in mind, this global energy management organization wanted to improve its responsiveness to customer needs and support requirements by better leveraging its collective knowledge. Part of this strategy was initiated in 2012 with the development of the Application Experts (AE) team, comprising five AEs aligned within the quality team that is part of the R&D center in France. The immediate objective for the team was to devise a knowledge management strategy for the global customer support organization (L1 through L3) that leverages knowledge within and outside of the Salesforce CRM system.

Learn more and request a demo:

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Business Goals:

- ▶ Develop an efficient and scalable Knowledge Management strategy for the company's global support organization
- ▶ Improve the company's KPIs, including time-to-resolution and agent productivity
- ▶ Increase overall satisfaction for both agents and customers
- ▶ Mine the company's diverse data stores more efficiently in order to identify emerging support-related trends and customer requirements
- ▶ Streamline administration of the company's search & exploration processes through easy-to-use and easy-to-manage technologies and solutions



While working with the global customer support organization to determine its needs, the AE team — which includes Arnaud, the key driver for this project — learned that the L1 and L2 teams had difficulty accessing previously solved cases, and, especially in the case of escalations, the knowledge of L3 experts. For L3 customer support agents, they were often bogged down answering repetitive questions from the L1 and L2 support teams.

The large volume and variety of documents, feedback and questions, all of which reside in different systems and locations, and which had to be retrieved manually, added to the challenges faced by the L3 team, which required information from a variety of sources and access to specialized knowledge repositories to solve complex customer issues.

It became clear a search solution that could supplement Salesforce was needed, to help customer support agents find relevant information and experts to resolve customers' problems faster. Ideally, the solution would offer the following features and functions to address the needs identified by the AE team:

- ▶ A search & relevance engine that could leverage a unified index to provide secure access to the diverse data residing in the company's various databases, and present it to the support agent in a manner appropriate to the task at hand.
- ▶ A 360° view of the customer, including his/her history of engagement with the company, and purchase & support history.
- ▶ An ability for the customer support organization to efficiently share knowledge with other business units & teams, including the company's marketing and quality assurance teams.
- ▶ A solution that enables individual agents to personalize their search & exploration experience.

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Results at a Glance:

- ▶ 25% reduction in case resolution time
- ▶ 30% reduction in time spent searching for information by Advanced Support Team (L2)
- ▶ 83% reduction in time and effort for reporting to Marketing and Quality Assurance departments
- ▶ Significant increase in search activity by customer support agents (with a mean of 60 queries per user per day)
- ▶ 90% of users reported a substantive increase in time savings and overall productivity
- ▶ 55% of users stated that the ability to find relevant data exceeds their expectations

Selection and Implementation

The most critical considerations for the search solution were the level of intuitiveness and ease of implementation. “We had to provide something that was intuitive to use — really a ‘Google-like’ experience inside the enterprise. People wanted to access information without more passwords or training,” Arnaud explained.

“I wanted something simple and easy to use. People are tired of learning another new tool; they want tools that they can use without passwords or training.”

— Arnaud, Application Expert

“After exploring several tools and conducting a proof of concept on several search engines, we decided to select Coveo because its ability to connect, index, search and data mine all the relevant databases from different platforms and with different structures exceeded our expectations,” shared Arnaud. He went on to say, “The main attraction was that the process of creating Coveo connectors was fast, straightforward and cost-effective. It also

helped that users could manage some facets by themselves and personalize the information they want, besides having a more user-friendly interface compared to other solutions, such as Autonomy.”

Coveo’s in-depth understanding of the company’s needs and ability to adapt Coveo’s technology to its specifications were also noted. “We have a very good relationship with the Coveo team overseeing product development,” said Arnaud. “They knew that we not only wanted search; we also wanted dashboards for customer support agents to show consolidated information about the customer we are speaking with; to analyze the questions trending from customers, so that we could create documents to best answer them; and dashboards to have an overview of a product range.”

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Results

Since the Coveo for Salesforce solution was implemented, improvements in customer support and relevance can be seen in many areas:

Faster case resolution rates and higher value work

Time savings were observed throughout the customer support organization and beyond: Time spent searching for information was reduced by 30% for Advanced Support (L2); the average time taken to find a solution decreased by an entire day for Expert Support (L3); and product reports for Marketing and Quality departments can be prepared in half a day instead of 3 days — an 83% reduction in effort and time.

Rapid discovery of existing knowledge and team experts

Users are also able to more easily find relevant information that they did not know existed, and more quickly identify colleagues around the world that have the expertise needed to solve customer issues. “Sometimes you find documents from colleagues from another line of business; you could never have found such information without Coveo,” shared Arnaud.

“Instead of spending days looking for answers to the same engineering questions already asked by other colleagues, I could find answers to my questions in minutes with Coveo.”

— Advanced Support Agent (feedback six months after the launch of Coveo)

Personalized advice for each customer

Coveo’s ability to connect, consolidate and contextualize information also increased customer support agents’ ability to give well-informed guidance that is relevant to the customer’s situation, which is especially valuable to companies with complex products or that operate across multiple geographies.

“With operations in more than 100 countries, we must adapt our support and offerings to suit the needs of different customers; customers in Europe, for example, are generally more mature in their use of our offerings and are better able to choose our products for specific applications,” Arnaud explained. He added: “Now I feel more confident about the solutions I provide because of the access to prior knowledge. I can be sure that I checked all the available information — building on what was done before — and did not leave out anything.”

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Uncovering emerging needs

The ability to mine the large volume and variety of data to identify emerging customer needs has helped the company's Marketing team identify offer gaps and increase customer relevance; it has also helped the Quality team determine performance gaps and take preventive actions, resulting in more quality improvements.

Higher levels of satisfaction across the board

The increased customer and agent satisfaction resulting from the deployment of the Coveo solution has increased customer loyalty and employee retention and motivation.

"Coveo is an intuitive tool — I was able to use it without much training. Searching for information in databases takes a fraction of the time it used to. Today I do not see how I can work efficiently without the tool."

— Advanced Support Agent (feedback six months after the launch of Coveo)

"You obtain pleasure from locating something relevant, quickly, for customers...or even yourself," shared Arnaud. "We have derived a lot of value from this investment into Coveo's technology."

Next Up

Following the success of the initial Coveo for Salesforce implementation, other business units within the company have been watching with interest, and have started to roll out their own Coveo initiatives.

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