





SUNGARD® PUBLIC SECTOR

SunGard Public Sector Boosts Customer Service & Staff Productivity with Coveo Search

Snapshot:

-  **Industry:** Software & Internet
-  **Geography (HQ):** Florida, USA
-  **Users:** 120 Support Agents, 230 Knowledge Workers; Customer Connect Portal Members
-  **Coveo Solution:** Coveo for Customer Service & Coveo Advanced Enterprise Search

Client

[SunGard Public Sector](#), a division of SunGard Data Systems, is a leading provider of software solutions and consulting services for local governments, public safety and justice agencies, and nonprofits. SunGard’s products and services impact the lives of more than 115 million citizens every day.

Challenge

SunGard’s recipe for success lies in hiring the best people and providing them with resources they need to succeed. Similarly, SunGard helps ensure customer success by providing great self-service tools via its [Customer Connect Portal](#) and maintaining a team of 120 highly-trained support agents in its contact centers.

SunGard built a sophisticated IT infrastructure to support its customer portal and support agents, anchored by deployments of Microsoft SharePoint, Microsoft Dynamics CRM, and Salesforce.com. Due to its success and fast growing portfolio of products and services, the number of unique pieces of content stored across SunGard’s core IT systems quickly grew past six million.

Results at a Glance:

- ✓ **Employee Productivity**
 - ↑ 700+ search queries/day, resulting in massive reduction in manual information requests
- ✓ **Contact Center Performance**
 - ↑ CSAT
 - ↑ Case deflection
- ✓ **Customer Self-Service**
 - ↑ Customer adoption – 450 queries/day on customer portal within 4 days of launch; 5% of all page views came from search
 - ↑ Customer Connect Portal activity – 7000+ sessions in first month

Learn more and request a demo:

www.coveo.com
info@coveo.com




United States
 San Mateo, CA
 +1.800.635.5476

Canada
 Quebec City, QC
 +1.418.263.1111

Europe (EMEA)
 Schiphol-Rijk, Netherlands
 +31 (0)20 658 6334



Business Objectives:

-  Maximize **employee productivity** and **satisfaction**
-  Boost **agent proficiency** and **contact center performance**
-  Accelerate **self-service** on SunGard [Customer Connect Portal](#)

To support a customer case, agents would regularly access Salesforce for pre-sales customer intelligence, Microsoft Dynamics CRM for post-sales customer records, and SharePoint for product information. Using this approach, finding relevant case-resolving content proved difficult because it relied upon the quality and accuracy of the search tools within each system.

“Coveo is our go-to search tool now. It has really optimized how we do business.”

Michael Paul, I.S. Manager, SunGard

With new corporate leadership in late 2013, one of SunGard’s top priorities was to enable customers and employees to find information more effectively.

“The most common feedback our CEO received from employees was that it was often hard to find what they needed to be successful, and help our customers succeed,” explained Chris Harrington, IT Applications Manager at SunGard Public Sector.

After reviewing SunGard’s IT infrastructure and user needs, the project team led by Harrington determined that the successful search solution must deliver on several key capabilities:

- ▶ **Unified** – One search solution for all knowledge repositories, delivering highly relevant, enriched results.
- ▶ **Intelligent** – Full-text search and deep text analytics to enrich content metadata to boost findability and search relevance.
- ▶ **Configurable** – Easy-to-set facets that can be tailored to meet changing user needs.
- ▶ **Mobile** – Responsive, full-featured mobile capabilities for consistent user experience across all SunGard online properties and all devices.
- ▶ **Secure** – Honors in real time the user and document-level securities of enterprise content across all knowledge systems and repositories.

Selection and Implementation

SunGard evaluated Coveo against FAST Search for SharePoint 2010 (FS4SP) and the Google Search Appliance (GSA). After some testing and architectural sessions, the team determined that leveraging FS4SP would prove too complex and require too much manual configuration. GSA was also disqualified, primarily due to its cost-prohibitive licensing model for enterprise-class deployments.

Coveo was selected because it met all of the key criteria established by SunGard, and because SunGard received a recommendation it knew it could trust. SunGard K-12 (a separate business unit within SunGard focused on educational products and services), has been successfully using Coveo for three years.

Learn more and request a demo:

www.coveo.com
info@coveo.com

United States
San Mateo, CA
+1.800.635.5476

Canada
Quebec City, QC
+1.418.263.1111

Europe (EMEA)
Schiphol-Rijk, Netherlands
+31 (0)20 658 6334



Content Sources Indexed:

- SharePoint 2010 → QA & support documents
- File Shares → Contracts
- Salesforce → Pre-sales customer information
- MS Dynamics → Post-sales customer information
- Databases (ODBC) → Knowledge bases
- Web → Product and service information

“I asked colleagues at K-12 about Coveo and they told me implementing it was a piece of cake, and that it delivered on its promise. I thought the same thing too after I worked on it.” Harrington added.

Coveo’s Professional Services team worked directly with Harrington and SunGard’s I.S. Manager, Michael Paul, to configure and deploy Coveo and within a few weeks,

Coveo was being used by SunGard’s 120 support agents and 230 knowledge workers. Utilizing Coveo’s browser-based interface, users could for the first time perform a single search across SunGard’s SharePoint, File Shares, Salesforce, Dynamics, proprietary databases, and corporate website, and be returned the most relevant content from each.

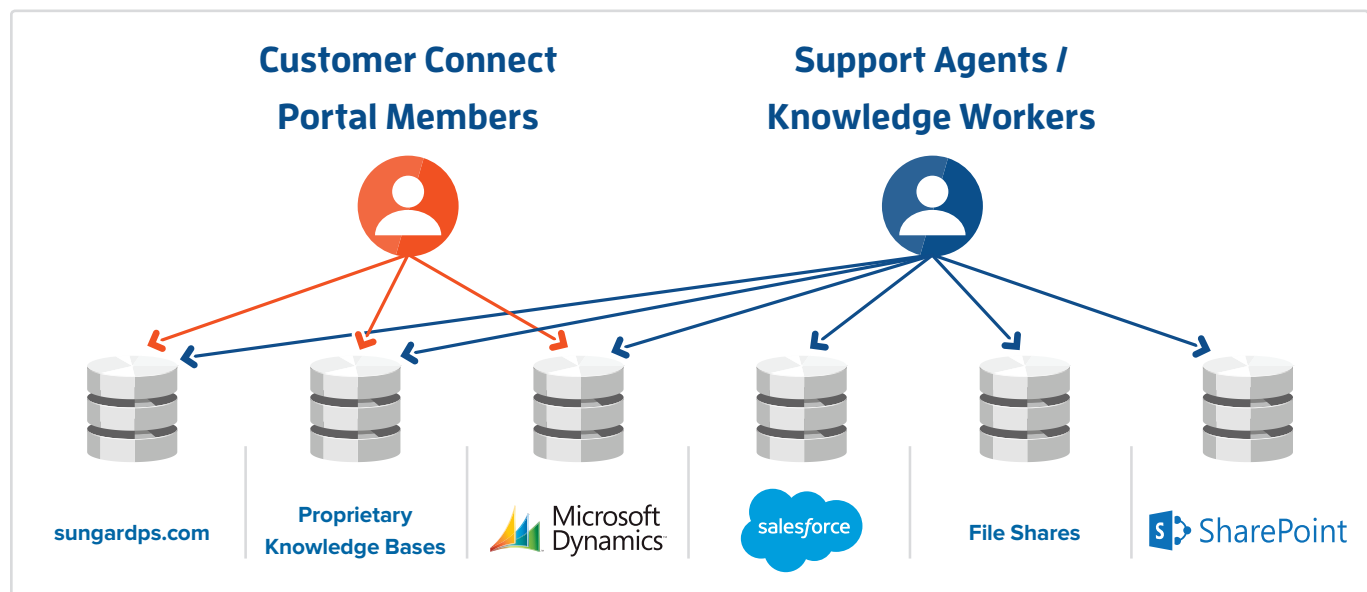
“We started with nothing in August 2013. By January 2014 our teams were using Coveo to search securely across all of our enterprise knowledge. It was a rapid deployment,” commented Paul.

“The ability to crawl and enrich our content with taxonomy-driven metadata is one of the best things about Coveo. It has improved findability significantly for us.”

Michael Paul, I.S. Manager, SunGard

Results

Coveo’s search solution proved popular among employees, and quickly became a “go-to” tool at SunGard. Many employees began to actively promote it to colleagues via the company’s Salesforce Chatter feed.



Learn more and request a demo:

www.coveo.com
info@coveo.com

United States
 San Mateo, CA
 +1.800.635.5476

Canada
 Quebec City, QC
 +1.418.263.1111

Europe (EMEA)
 Schiphol-Rijk, Netherlands
 +31 (0)20 658 6334



“You know that when they start recommending a tool to each other, you’ve given them something of real value. Coveo has definitely been a game-changer,” said Harrington.

“ We see a decline in requests for information as our colleagues can now use Coveo to easily find answers from the documented guidelines and other helpful content we’ve published.”

Christian Coleman, Vice President and CFO

Creating a Search-Driven Knowledge Culture

To ensure agents and team members know how to gain maximum value from the Coveo solution, Harrington and Paul conduct quarterly training workshops, where employees learn best practices and share tips & tricks.

To date, approximately 14,000 search queries are conducted per month, across SunGard’s CRM records, documents in legacy systems, contracts in file shares, and Development Work items from Microsoft Team Foundation Services (TFS).

Bringing Coveo Search to the Customer Connect Portal

Motivated by the positive feedback from its support agents and staff, SunGard decided to equip its Customer Connect Portal with Coveo’s search capabilities. Launched in October 2014, SunGard’s new Customer Connect Portal now provides customers the ability to quickly find the information they might need to resolve issues and answer questions.

The Coveo search solution takes into account the customer’s unique location, preferences, and history with the company to customize the search results and content displayed using dynamic, pre-selected facets. It also ensures customers are provided a seamless, consistently branded experience across desktop, tablet, and mobile devices. Coveo’s enterprise-class security ensures they only access the content for which they have appropriate permissions.

“We saved a lot of effort by using Coveo’s analytics engine to classify the diverse content and make it easily sortable via the facets created,” shared Harrington. The impact was almost immediate. Within four days of Coveo being deployed on the SunGard Customer Connect Portal, an average of 450 searches per day were being performed on the site.

“[Visitors to the portal] told me they love the new search experience,” commented Harrington. A Customer Connect Portal member, Craig Richards, Manager of Police Information Technology and Projects at City of Fort Lauderdale shared: “The updates to the SunGard Customer Connect Portal are a dramatic improvement in usability. The [Coveo] search solution returns results that are much more readable, and the sorting and filtering capabilities provide quicker access to information I’m looking for. This reduces the amount of time required to find support information and improves our self-help capabilities.”

Learn more and request a demo:

www.coveo.com
info@coveo.com

United States
 San Mateo, CA
 +1.800.635.5476

Canada
 Quebec City, QC
 +1.418.263.1111

Europe (EMEA)
 Schiphol-Rijk, Netherlands
 +31 (0)20 658 6334



Mobile-Optimized & Multi-Faceted Search on Customer Connect Portal

Next Steps

After delivering Coveo search to SunGard’s support agents, knowledge workers, and customers, SunGard plans to deploy a pilot Connect Community portal for select partners and customers. Architected on the Jive platform, the new community will deliver even more self-service and information access for SunGard customers, and the company expects to make this a reality by using the power of Coveo.

For media inquiries on SunGard Public Sector, please email Matthew Springer at matthew.springer@sungardps.com, or call 407-304-3235.

Learn more and request a demo:

www.coveo.com
info@coveo.com

United States
San Mateo, CA
+1.800.635.5476

Canada
Quebec City, QC
+1.418.263.1111

Europe (EMEA)
Schiphol-Rijk, Netherlands
+31 (0)20 658 6334

