



3i Investment Professionals Use Coveo for Real-Time Deal Intelligence

Snapshot:

-  **Industry:** Financial Services
-  **Geography (HQ):** London, UK
-  **Users:** All 270 employees
-  **Coveo Solution:** Advanced Enterprise Search
-  **Content Sources Indexed:**
 - SharePoint 2007 → Deal information, HR, and compliance documents
 - File Shares → Department and user-specific documents
 - MS Exchange → Email
 - Enterprise Vault → Archived email and files
 - Databases (ODBC) → Proprietary knowledge bases
 - Active Directory → User profiles

Client

[3i Group plc](#) is an international investment manager focused on mid-market private equity, infrastructure and debt management. Listed on the London Stock Exchange since 1994 with almost £13 billion of assets under management, 3i is part of the FTSE 100 and has 270 employees operating out of 9 offices across Europe, Asia, and North America.

“Coveo’s speed of deployment was superior to its competitors. We were amazed at how things could be done in hours instead of days or weeks.”

Jon Page, Global IT Applications Manager, 3i

Challenge

3i leverages the extensive experience and on-the-ground knowledge of its 100 investment professionals to identify attractive investment opportunities and maximize returns. It takes a “best team for the job” approach, bringing together the right people from across the business for deals and projects.

To support its business operations, 3i built a sophisticated IT infrastructure anchored by deployments of Microsoft SharePoint and Enterprise Vault, in addition to Microsoft Exchange, File Shares, Active Directory, and several proprietary databases.

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



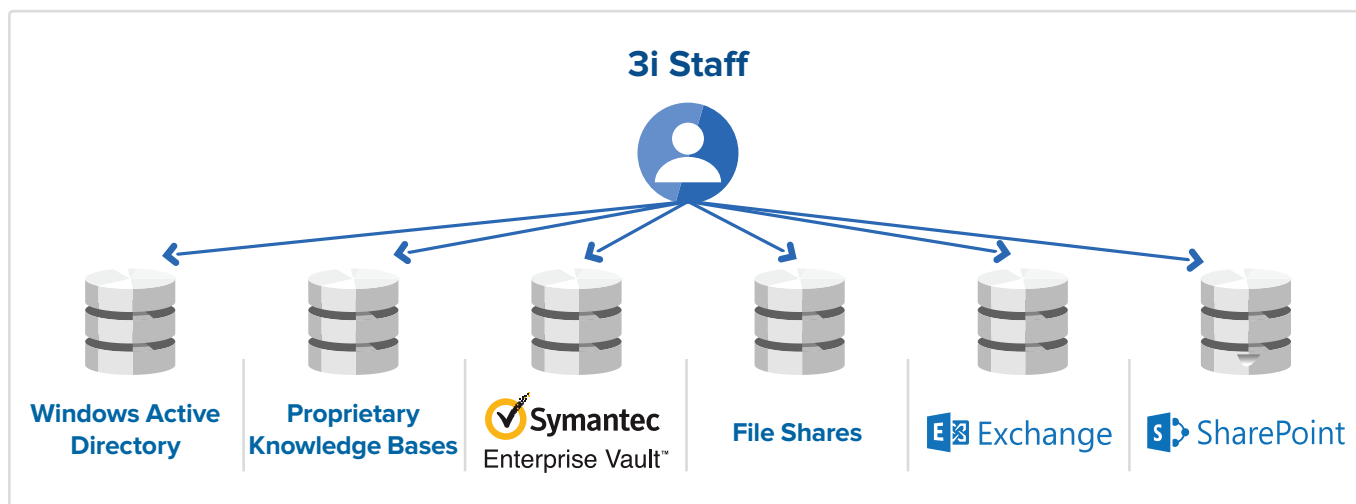
Business Objectives:

- Improve staff performance with real-time intelligence
- Proactively support 3i compliance obligations
- Streamline team access to enterprise knowledge assets

These systems contain a wealth of information about past and current deals across the diverse industries, geographies and business lines that 3i operates in. To prepare proposals and research potential deals, 3i’s investment professionals regularly access deal sites hosted on SharePoint, email communication residing in MS Exchange, the company’s vast archived content residing in Symantec Enterprise Vault, and a wide variety of documents and presentations in 3i’s corporate file share. Additionally, team members new to an ongoing deal are expected to leverage these knowledge stores to get up-to-speed quickly.

Over time, the volume of content in these systems proliferated and it became challenging for staff members to search across each system. 3i staff members found it particularly challenging to search across the company’s expansive digital archive, due to the poor user experience and search capabilities of Symantec’s Enterprise Vault.

3i decided to upgrade the search experience for all its employees to ensure that everyone could swiftly and securely find the information they needed to do their job successfully. Given the highly regulated and sensitive nature of 3i’s business, the new search solution needed to deliver not only enterprise-class security, but also support the company’s stringent compliance and regulatory obligations.



With 3i’s business objectives in mind, the project team – led by Global IT Applications Manager, Jon Page – determined that the successful solution would need to deliver several key capabilities:

- ▶ **Unified Access** – Provide users with a single point of access to content in all knowledge repositories, delivering a set of unified, highly relevant results.
- ▶ **Integrated UI** – Enable user-friendly, role-based interfaces that can be easily integrated into 3i’s SharePoint interface, complete with easily configurable facets that allow users to quickly find specific content.

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

Results at a Glance:

- ✓ 90% faster access to deal-related intelligence
- ✓ 20% reduction in staff and resources required to respond to compliance requests
- ✓ Boosted team morale (“It has revolutionized my life.”)

- ▶ **Enterprise-Class Security** – Honor in real time the user and document-level securities of enterprise content across all knowledge systems and repositories.
- ▶ **Intelligent Mashups** – Provide full-text search coupled with deep text analytics, to enrich 3i’s unstructured content with appropriate metadata and hence make it more findable and sortable by users.
- ▶ **Actionable Analytics** – Deliver in-depth search analytics to uncover unmet user needs and identify knowledge gaps.

Selection and Implementation

The team elected Coveo after conducting a Proof of Concept on Coveo, FAST Search for SharePoint (FS4SP) and the Google Search Appliance (GSA). Coveo was the only solution that met all of 3i’s requirements, and also proved the fastest to deploy and easiest to configure.

“We were pleasantly surprised by how quickly it was to implement the indexes, search interfaces and custom refiners that we want, with Coveo,” explained Page.

The Coveo Professional Services team commenced work on the implementation and within five months, the solution was fully deployed. 3i staff members could for the first time perform a single search across all the company’s knowledge repositories using either a browser-based interface or integrated search interface within SharePoint, both powered by Coveo.

3i’s compliance team was provided with a dashboard that enabled them to search and correlate content from across 3i’s entire data set, and quickly evaluate permissions and user access rights for every 3i record or knowledge asset.

As content is indexed in real time, users have access to the most up-to-date search results. “The moment you receive an email, it appears in Coveo’s search results almost instantly,” shared Page. To provide users with the most relevant search results, Page utilizes insights gathered from Coveo’s usage analytics to continually fine-tune relevance and boost popular content. Throughout the deployment process, the Coveo team worked closely with 3i to ensure a smooth implementation.

“Coveo’s professional services consultants were very knowledgeable. We were confident right at the start that the deployment would be successful,” commented Page.

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



Results

Coveo quickly became a “go-to” tool at the company, enabling 3i staff members to easily find specific pieces of information among the growing volume of content, especially as file share content and email volume continue to grow at 27% and 17% per year respectively.

“Coveo is now top of mind when it comes to searching,” shared Page. “People typically use the Coveo browser-based UI first, although Coveo search is also integrated into SharePoint,” Page added. “It has become an essential tool in everyone’s day.”

Today, all 270 3i staff members use Coveo to search across 3.66M File Share documents, 6.39M Exchange emails, 897,000 SharePoint items and documents, and 107M Enterprise Vault records. With Coveo, the speed of access to deal-related knowledge has increased by 90% for staff members. The compliance team also saw a 20% reduction in the staff and resources required to respond to compliance requests.

And 3i’s staff members have not been shy about providing feedback. The company conducted a user survey and responses have been overwhelmingly positive. “Coveo has revolutionized my life,” commented one worker, and a senior 3i staff member described the user experience as “phenomenal.”

3i Staff Feedback



Next Steps

Following the success of its initial Coveo implementation, 3i has begun planning to use Coveo to help identify candidates for executive roles within its portfolio companies. Coveo will be used to index content from 3i’s recently acquired eFront system, which contains the CVs and profiles of experts from its Business Leaders Network. This will enable 3i to quickly identify experienced and trusted professionals to fill C-level roles in its portfolio.

“Coveo’s expertise-finding capabilities will be huge for us. We are looking forward to expanding Coveo’s capabilities into new areas of our business,” Page added.

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

