

CUSTOMER STORY



Think Mutual Bank Transforms Intranet
with Coveo for Sitecore



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Customer Story: Think Mutual Bank Transforms Intranet with Coveo for Sitecore



COMPANY INFO

Industry: Financial Services

Product: Coveo for Sitecore

HQ (country): USA

Content sources: Sitecore CMS

Number of employees: 280

METRICS AT A GLANCE

95% of employees trust information on intranet

31% increase in usage

95% adoption by staff

CUSTOMER GOAL

In order to provide the best service to customers, Think wanted its intranet to be a vibrant information and collaboration hub for all of its staff and management. Think also wanted the intranet to function as a knowledge base for its customer service employees – branch customer service staff, support center representatives, and back office support staff.

The bank's existing intranet, however, was not optimal. Built on Lotus Notes and supported by several underlying databases, Think's prior intranet was difficult to manage and use. And the search capabilities did not allow for advanced searching, with no automated synonym matching or stemming capabilities. If a user did not know the exact term or category by which a document might be tagged or categorized, they would often get a "No Results Found" message when performing a search. Intranet users could never be sure if indeed the content they were looking for didn't exist, or if they just didn't get the search term right.

"To make sure they had information they needed to support customers, Think's dedicated support center representatives resorted to printing binders of memos, tip sheets and how-to guides, both for their own reference and to share with new employees, concerned that they could not find the information again in the existing intranet," shared Joan Stiller, Think's Corporate Services Analyst.

The project team, led by Stiller, along with the Information Architect and Content Manager, Lynne Ryan, selected the Sitecore Intranet Portal as the content management solution (CMS) for its new intranet, but knew that for the intranet to be successful, the Sitecore platform would need to be fortified with search capabilities that deliver a truly unified and user-friendly search experience.

The team began exploring its options.

Working with Sitecore, Stiller and her project team determined that the search solution needed several key capabilities & attributes:

**INTEGRATED**

Tight integration with Sitecore's CMS

**SECURE**

Real-time security at the user and document-level for all indexed content residing in Think's Sitecore CMS master database

**INTERACTIVE**

Dynamic search faceting to enable employees to quickly filter and explore content, and a "scarce results" feature that recommends new variant search queries when user searches return limited results

**TRANSPARENT**

Actionable usage analytics that provide line-of-sight into what users are searching for, how they are searching for it, and where content gaps exist

**TUNABLE**

An easily tunable relevance engine, coupled with robust thesaurus and stemming features, to enable more flexible searching

After evaluating both Coveo and the embedded search technology, Think selected Coveo for Sitecore, as it met all the key capabilities the project team identified. "Coveo was the better solution for our needs," explained Stiller.

Coveo worked closely with the Think and Sitecore teams to deploy Coveo for Sitecore in tandem with the content migration to the new intranet, called T-Net. Throughout the process, the Think project team sought and incorporated feedback of employees from different functional areas to be sure that the intranet met the needs of its audience. Within nine months, Think completed the content migration and T-Net was officially launched.

T-Net offers two search experiences enabled by Coveo:

1. The global search box, "Power Search," allows users to explore information resources across the entire intranet, and easily sort results by source, document type, or date.
2. The T-Net "Expert Directory," a specific search interface requested by Think's employees, allows employees to look up relevant experts on the fly based upon their expertise and work product. For example, a Think customer service representative at a branch office can use the T-Net Expert Directory to quickly identify a bilingual or multilingual colleague to assist a non-English speaking customer.

Because user-friendliness and adoption of the new intranet were key priorities for Think, Stiller and Ryan conducted one-to-one and group user trainings, and have continued them periodically.

Results

“Our intranet with Coveo search has had a huge impact on the way Think employees work.”

JOAN STILLER, CORPORATE SERVICES ANALYST, THINK MUTUAL BANK

T-Net’s search capabilities were quickly embraced by users, and Stiller believes this contributed significantly to the positive results they’ve experienced to date:



USER ADOPTION

100% intranet user adoption with 31% increase in monthly intranet usage



TRUST

95% say they trust information on T-Net



FINDABILITY

80+% say information is “easy to find” on T-Net

Stiller and Ryan also regularly receive positive comments from T-Net users. “I use the power search every time to get to where I want to go in T-Net,” one user shared. The intranet also played a role in revolutionizing the corporate culture. Instead of working in silos and hoarding resources, employees are more likely to collaborate and post new information to the intranet to share with colleagues. Customer service team members regularly share feedback with administrators on content gaps.

With the powerful usage analytics, administrators are able to keep relevance optimized at all times. Stiller regularly uses Coveo’s integrated toolkit – including its thesaurus and query rules editor – to tune search results and boost high-impact content. Because Coveo’s usage analytics and relevance tuning tools are so intuitive, Stiller only spends a few minutes each week reviewing her analytics report and fine-tuning the solution.

“Team members are proactively contributing to our store of company knowledge and filling content gaps on T-Net. We realize the value of having highly relevant search results returned, both to find references and to identify where there is a need.”

JOAN STILLER, CORPORATE SERVICES ANALYST, THINK MUTUAL BANK

What's Next

Coveo has transformed how Think's employees find, share and curate the knowledge they need to be successful. "Coveo has become a business-critical tool for the Think team, and it will definitely be an essential component of our intranet going forward," Stiller shared.

How can Coveo Help you?

To learn how Coveo Intelligent Search can improve the proficiency of your organization, contact one of our agents today.

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