

# Fortune 50 Healthcare Company

Connects the Long Tail of Collective Enterprise Knowledge with Coveo

## Snapshot:

- ▶ **Industry:** Healthcare, Pharmaceuticals & Biotech
- ▶ **Geography:** Global
- ▶ **Types of Users:** Customer Support
- ▶ **Coveo Solution:** Coveo for Knowledge Management
- ▶ **Summary of Business Challenges:** Retirement of experienced baby-boom agents and expansion into global emerging markets required expert local support, increased productivity and reduced training time and expense



## Program to Speed Time-to-Competence for Agents Supports Its Commitment to Laboratories, Physicians and Patients as It Expands in Emerging Markets

Knowledge-intensive organizations increasingly struggle to unlock the potential value associated with the variety, volatility and volume of knowledge and information both within and external to their organizations (often termed Big Data), fragmented among myriad cloud and on-premise systems. With the failure of traditional knowledge management programs of the past, which often attempted to contain knowledge in a single system, organizations increasingly look to new technologies to connect with, unify and contextualize data where it resides, so that each employee can know what the organization knows, as well as who in the organization knows it.

Often beginning in a business area where the benefits are easily proven and documented, such as in customer support and engineering, organizations work towards quick wins that can prove the value of connecting all employees with the Long Tail of Collective Enterprise Knowledge.

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# Coveo for Knowledge Management

## Results at a Glance:

- ▶ Hard cost avoidance of \$500,000 per year in time saved alone
- ▶ 10% increase in ability to meet SLA
- ▶ 10% increase in first time fix rate
- ▶ Reduction in time spent training new staff from two years to two months
- ▶ Ability to staff at less cost (fewer MedTech degrees) and locate in emerging markets for local service
- ▶ Ability to leverage knowledge held by retired and soon-to-be retired “baby boom” staff

Just as Internet search unlocked the Long Tail of everything; within the enterprise, Search & Relevance technology unlocks the Long Tail of Collective Enterprise Knowledge so that every front-line employee can have the contextual knowledge needed to make the best decisions, provide the best service, make the best sales, and go to market with the best products.

(As Chris Anderson’s Long Tail theory applied to ecommerce describes the large number of unique items available in small quantities — unconfined by physical boundaries or systems — when applied to Knowledge Management, it describes digital capabilities eliminating physical and IT boundaries to employees’ sharing of even highly specific knowledge and expertise.)

A medical device and diagnostics division of this Fortune 50 Healthcare Company began such a journey to improve the time-to-competence of its agents during a period of expansion into emerging markets, which required new models of customer support to support its mission. The company’s procurement manager, Sarah, worked with the medical device and diagnostics division’s Customer Support team to contract with Coveo, a leading provider of Search & Relevance Technology, which was already at work for another division in this Fortune 50 Healthcare Company for its Knowledge Engineering Program.

Seeing a successful vendor partnership that would benefit additional divisions of the company, Sarah worked with Coveo Chief Knowledge Evangelist Diane Berry to document the process and benefits of this medical device and diagnostic division’s program so that other divisions in the company could learn about new ways to support a complex challenge, in partnership with a proven supplier to several divisions of this global Fortune 50 Healthcare Company. Berry conducted in-depth interviews with this division’s Customer Support team to document the program outlined in this paper.

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## Honoring the Mission

As the leading provider of total solutions for screening, diagnosing, monitoring and confirming diseases early, before they put lives at risk, this medical device and diagnostics division has as its single focus to help hospitals, laboratories and blood centers worldwide deliver results that help patients experience a better quality of life. As with all members of this Fortune 50 Healthcare Company, this division looks to the company’s mission to guide its operations.

If the division’s products stop working for any reason, physicians may be forced to wait to diagnose their patients, and patients therefore may wait for treatment. This would be unacceptable, related Michael, program manager in the medical device and diagnostics division’s Customer Support team, who led a program to speed time-to-competence for new agents.

The organization successfully delivered on its mission during its expansion over a 15-year period, from a few product lines and information repositories to more than 200 SKUs, increasingly complex products, a much more stringent regulatory environment and complex documentation requirements, as well as an expanding information ecosystem with information in innumerable places, from multiple websites and training libraries, to data warehouses full of service records, and more. Its customer support throughout this period remained top-notch, thanks to an extensive, long-term training program and the long tenure of highly experienced support agents, the vast majority of whom were highly qualified with medical technology degrees before joining the team.

**This high-cost, resource-intensive customer support program, while extremely successful to date, was anticipated to face significant challenges and increasing expenses as the company continued to grow and expand its markets as described below:**

### Business Challenges:

- ▶ Planned expansion into developing markets in Asia, Europe, Africa, and Latin America would further increase the complexity of its service organization with new languages and localization of support.
- ▶ New global agents would require real-time access to the same, relevant information available to agents at headquarters.
- ▶ Senior customer support agents in mature markets were approaching retirement age, signaling a coming increase in hiring as well as a potential loss of institutional knowledge.
- ▶ Significant time-to-contribution for new agents, with a minimum of six months training required to contribute and two years to full competency, threatened productivity and signaled increasing costs.
- ▶ Turnover among new agents challenged by the fast-paced, demanding and technical job, exacerbated by an inability to find the information they needed while on that critical initial call with the customer.

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To continue to honor its mission—ensuring equipment uptime and ultimately quality patient results, an affordable cost structure so important to its customers, and a rewarding, enjoyable work experience for its employees—the support team, in an initiative led by Michael, created a strategy to significantly reduce training time, and to begin to address the organization’s knowledge management challenges. As part of this broad initiative to reduce the time-to-competence for its customer support agents, so that they can give customers the right answer in real time, every time, this medical device and diagnostics division embarked on a journey to enable the Long Tail of Collective Enterprise Knowledge with Coveo.

**The division’s Customer Support team devised a three-part strategy to reduce new agent time-to-competence for agents:**

1. Change the agent career path
2. Revamp training materials
3. Unify information access across all repositories with Coveo Search & Relevance Technology

## The Strategy

### 1 Hire for skills

All elements of the strategy work together congruently. While Steps 1 and 2 were completed first, the rollout of the Coveo solution to all support agents is expected to contribute to and help optimize the first two steps.

For Step 1, rather than continuing to hire only highly skilled agents with medical technology backgrounds who could immediately manage complex electromechanical issues and assays, at a Technical Specialist 2 level, the division began hiring less experienced agents who would be able to answer more simple questions to start, and progressively learn to handle the more complex cases. The goal was to spend three weeks training and then allow the agent to start taking calls to answer basic questions. From both cost and talent availability perspectives, hiring for call center skills rather than technical skills was successful, and it has been found that these individuals often have more “soft” skills that enable them to deal with customers very well, and there is cross-training potential of the soft skills for the technical skills.

According to Michael, “These new hires have more soft skills, but don’t know anything yet about our business—the terminology, the complex products, all of that needs to be taught. But, if you provide them with the exact information they need exactly when they need it, it’s great. That’s what Coveo will do for us.” Michael notes that all long-term agents have stories about finding information. “People who have been here forever know where to search or which term to search on for an answer to a specific issue, but it may have taken them 20 years to learn it, and then they had to remember it. We can grow our business in developing markets but we cannot continue to serve it with this model.”

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## 2 Revamp training

For Step 2, the team targeted reducing gaps in training materials, and reducing the time spent training at the division’s research headquarters, from six months to a few weeks. They also enabled remote training for new hires in emerging countries.

“Our challenges were, how could we share information with remote employees to be sure they could use the same processes and the same information that’s available to our agents in our existing call centers?” said Michael. “As we staff up in emerging markets, we’d like to be able to use that new capacity to serve other markets as well, while the business is building in those new areas.”

## 3 Provide unified, on-demand knowledge

The medical device and diagnostics division had hired 10 agents in Singapore and found that it took a full two years for them to become productive and able to provide additional capacity to other markets. “We sent people to Singapore to coach, we had people review calls with the new team members. Each week, we would hold conference calls to review calls and do some coaching, which helped

a lot, but it was a slow process,” said Michael, who also noted that they were unable to use that capacity in other markets, so productivity in those markets was low, initially (the division has since doubled productivity in Singapore).

“Coveo will be key to helping us get remote agents comfortable and confident much more quickly,” said Michael. “When you hire a new agent and bring them on board, the amount of time it takes the agent to learn where data sources are to find the information they need to answer that pop quiz every time they answer the phone is a significant challenge. Without Coveo and the other changes we’ve made, it was taking five to six months to be useful, and up to two years before they were competent and confident in knowing where to find information. We also were seeing some turnover in newer people—it is definitely a demanding, fast-paced job, requiring a broad range of knowledge.”

The medical device and diagnostics division’s project manager, Lindsay, who was responsible for the implementation of Coveo, notes that she expects the Coveo Analytics module to also help identify gaps in training and other content. “We’re looking forward to getting value from the Usage Analytics. It will help us spot content gaps and also understand how our teams are using the new technology, and how we can always increase relevance.” Coveo Usage Analytics will be employed to continually refine the relevance of results presented to agents, as it feeds usage back into the Coveo Relevance Engine.

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## Not Your Parents' KM, and Help from a Sister Organization

The medical device and diagnostics division had started down a path several years earlier to migrate its information from multiple repositories into a single knowledge base, which is a traditional KM strategy. Micheal related, “when we started looking to migrate into one system, we were confronted with the situation that the amount of effort required to migrate the data was huge, it needed to be cleaned up, and the front-runner knowledge base only supported certain parts of our information, so that other information would remain in other databases, and there was no way to connect it all. Because it was going to be such a huge cost to reformat all of our data, and still be an incomplete solution, the project never got started.”

The team had avoided learning a tough lesson most companies go through. Often, traditional Knowledge Management programs focus on distilling knowledge into systems of record, which end up being under-utilized for a number of reasons, chief among them because they cannot contain the Long Tail of Enterprise Knowledge.

As the team realized during its research and planning, the Long Tail of Knowledge is spread throughout all systems, both within and external to the organization, and it resides in the knowledge, often implicit, of employees and other constituencies. Both the explicit knowledge and information itself and traces of employees' implicit knowledge may be found in IMs and emails, phone records, databases, social media, ECM systems, KBs, CRM systems, blogs, desktop content, collaboration tools, file shares, etc. It is spread among global offices and often among employees who may be working remotely. The team learned about Coveo at an industry conference, and found that they could connect all of the information within their ecosystem, unify it in an index, and automatically enrich it so it would be easily found and associated to the agent's context, from a single, intuitive interface. They learned that they would be able to connect their agents with the Long Tail of Knowledge without reformatting any data, moving data or shutting down existing systems. Coveo would simply connect with, consolidate, enrich and contextualize the data across all of the organization's 12 information repositories, as well as the multiple sites under each system. Support agents would gain a single interface with intuitive, personalized navigation.

“We needed something that would enable us to give new agents the opportunity to search and find the fragmented pieces of information they need, which might exist across multiple systems, to answer that customer question the first time. We wanted something simple to use, that would give people a single interface,” said Michael.

Michael then learned that a sister organization, another division in the Fortune 50 Healthcare Company, was using Coveo to transform its Knowledge Management with contextually relevant information, helping its engineers to cut their research and development time in some instances by more than half. “We talked to the team at our sister organization and they were very happy with the technology and with the results they were gaining,” said Michael. “Plus they felt that the Coveo team was a great partner to them.”

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## Competitive Review and a New Partner

The Fortune 50 Healthcare Company’s ITS team had encouraged the medical device and diagnostics division to go with Microsoft SharePoint, and use its embedded search. However, Michael understood that while some information the agents needed to access was in SharePoint, it also resided in multiple systems outside of that single system, so he agreed to do two proofs of concept, one with SharePoint and one with Coveo, and then let the users decide.

“While we did a more limited POC with SharePoint, hands-down, our users preferred Coveo,” said Michael, “the usability, the interface, the relevance of results, mobility, and the analytics module were all key factors in our decision. Because the users preferred Coveo, we did a much more extensive POC with them, which showed us the power of the technology.” Mobile was key for the division to support its field agents who go on-site, with instantly available knowledge from the company’s knowledge ecosystem for faster fix rates.

The division would go on to bring 12 different systems into the Coveo Unified Index, some of which have multiple instances, making that consolidated, unified information instantly available to agents. Among the systems indexed are Lotus Notes, SharePoint, a home-grown Datamart, as well as other databases, file shares, and multiple intranet sites. The real-time filtering of information and dynamic facets allow the agents to create their own context and connect with both the data and the people who are expert in a certain topic, when and where they need to. Michael notes that Coveo’s mobile capabilities were a key factor in his decision to choose Coveo. “All of our agents and field staff have iPhones and/or iPads,” said Michael. “We need to enable them to access the information they need, wherever and whenever they need it.”

Rather than a vendor-buyer relationship, the working relationship with Coveo is described as a partnership by the team. “We feel that Coveo has worked with us as a partner, understanding both the technology and our business, and helping us to understand the best practices for ensuring we meet our business requirements and gain the greatest value from the software,” said Lindsay. Self-assessed as “not highly technical,” Lindsay noted that as project manager for the implementation, she relied on her partners at Coveo to configure the connectors to meet the business needs of the division. “The Coveo team we worked most closely with was like a machine,” she said. “One engineer in particular came on site for three days, and was amazing in his knowledge of how unified knowledge access would contribute to our needs. He really listened and understood our unique business requirements,” she said.

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As with most KM-related projects, this program is a journey. “We’re looking forward to some changes in how the information from Lotus Notes will display,” said Lindsay, “and to learning more about the Analytics Module. We’re also planning to add the dynamic expertise finding in the not-too-distant future.” Michael added that mobility and customer self-service are also among their future plans.

## Measuring Results

Currently in the midst of rolling out the platform to all of its support agents, the team at the medical device and diagnostics division will track results carefully, and Coveo will work in partnership with them to help track as well as document their results and continue to refine the system over time.

While the savings in shortening the time-to-contribution for new agents can be substantial, it’s more important for the team to measure the business contribution. The cost of a fully burdened agent, according to Michael, is anywhere from \$4,000 to \$10,000 per month. With a goal of reducing the initial six month training time to two months, that would be a savings of anywhere from \$16,000 to \$40,000 per agent.

More important, however, is the ability to serve customers at the same or higher levels of service while decreasing costs to keep its prices affordable and also enhance profitability. “Our SLA for our customers is answering the call within 180 seconds,” said Michael. “We need to hold to this with our new, remote agents and take advantage of the new capacity as we continue to hire new agents as we expand into emerging markets around the world.” Generally the division’s support organization meets its primarily internal SLA at a level of 50 to 60 percent, though it has ranged upwards of 75 percent at times. With the rollout of the program, Michael said he expects to increase that by 10 points, which will have a real impact on the business.

Michael notes that while meeting the SLA is a key goal and metric, the team is working on another metric that they feel will be even more meaningful to their business: First Path Effectiveness. This will look at the Alpha/Beta risk associated with each call: Did the agent make the right call, the first time? Will the team be able to reduce the risk of not making the right call, for example dispatching a field engineer unnecessarily, which would increase downtime of its equipment at a client site? The team is in the midst of refining the measure to increase consistency across contact centers and to remove less meaningful items such as routine callbacks.

Customer Support also looks at the number of cases handled by each agent per month. Micheal notes that that is a better measure for their business than case handling time, as agents will multi-task. After handling a case, agents typically spend just as much time managing the compliance paperwork. Typically, according to Michael, case handling time is about 30 to 35 minutes, with nearly half of it spent documenting the call to meet regulatory requirements.

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Another productivity measure the team will continue to track is the first time fix rate. Currently at between 60 to 70 percent (1 2/3 calls per case) for its hotline first time fix rate, they anticipate increasing that by 10 points as well, conservatively, when agents are connected with the Long Tail of Knowledge from across the medical device and diagnostics division’s knowledge ecosystem.

“Our customers constantly strive to reduce the costs of the people running our machines, and they have fairly constant turnover, so we need our agents to help train their new people when they have issues; this causes calls for even simple questions,” said Michael. “Some of these people are tech phobic, but then you have an entirely new crowd that are highly technology proficient, living with mobile technology. It won’t be a stretch for them to use self-service, which we intend to work on with Coveo to enable in the mid-term.”

## Anticipating the Knowledge Management Journey

As KM professionals know, optimizing knowledge management processes is an ongoing journey. These processes need to become part of the business and embedded in each and every activity. With Coveo, this medical device and diagnostics division is making the Long Tail of Knowledge available to each and every agent, for each and every interaction, so that even highly specific information that is fragmented across multiple systems can be aligned to relevant cases as agents are on the phone with customers. Adoption will be a matter of change management for long-term agents and training for new agents as they are onboarded.

“**We look at Coveo as a foundational element of our Knowledge Management journey.**”

As with all business change journeys, activating the Long Tail of Collective Enterprise Knowledge requires a combination of change management, process and a systems approach to connecting people with relevant data and information within their own context, and through information, with relevant people. With Coveo, this division has begun the journey; they have already had quick wins that will incent users to change how they find and navigate contextually relevant information. According to Lindsay, “Over time, Coveo is a tool that will help us share and find knowledge better. It will make us more efficient and effective, and will help to drive our processes as we work on our global Knowledge Management strategy. Coveo will help us find and focus on areas where improvements can be made, and which we can measure, thanks to the analytics of their technology. We look at Coveo as a foundational element of our Knowledge Management journey.”

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It seems they are off to a solid start. Anecdotally, the Proof of Concept team who participated fully were excited about the technology. “I received emails asking if they could keep using it, that they wanted to help this to get even better,” said Lindsay, who shared some of the comments she received from the team that participated in the Proof of Concept:

“ **First of all I’d like to say thank you! This tool is great. It provides much more information than field agents are used to finding. Am I mistaken or are we seeing hotline documents as well? The service pubs will be extremely helpful.... Again, I really like it and will continue to explore!** ”

“ **I needed an IFU [Instruction for Use document, previously accessed only through a separate database] – BAM, there it is! Thanks...** ”

“ **Was just poking around for myself, love the pie chart! It will give us a heads up on how often service is needed for the code so we don’t spend too much time troubleshooting!** ”

## Conclusion

As this medical devices and diagnostics division of the Fortune 50 Healthcare Company continues with its rollout, the team will continue to track progress toward goals and any surprises and lessons learned along the journey to enabling the Long Tail of Collective Enterprise Content.

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