SearchUnify® | BLUEBEAM®
A NEMETSCHEK COMPANY

SILVER
2021 STEVIE® WINNER
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CUSTOMER SERVICE

CASE STUDY

HOW BLUEBEAM ACED THE ART OF CASE DEFLECTION

www.searchunify.com

About Bluebeam

Industry
Computer Software

Headquarters
Pasadena, California

Founded in 2002 and headquartered in Pasadena, California, United States, Bluebeam is a leading software company that develops innovative technology solutions that set the standard for project efficiency and collaboration for design and construction professionals worldwide. Bluebeam has additional US offices in California, Texas, Illinois and New Hampshire, as well as offices in Sweden, Denmark, Germany, Australia and the United Kingdom.

◆ Honored in Built In LA's Prestigious Best Places to Work List 2020

◆ Named to Deloitte's Technology Fast 500™ List - Most Rapidly Growing Technology Companies in the US

◆ Named a commercial winner in the Constructech Top Products Awards

◆ Winner of the DesignEX Sustainability Award

Challenge

Due to Bluebeam's rapid growth, they were witnessing an inflow of support requests from their growing customer base. The nature of requests was not complex, but the volume was high.

They have a customer community with an integrated knowledge base where vast amounts of product information and troubleshooting content resides. Despite that, the customers who visited the community would end up logging a support case, and because of that the support engineers were concerned with the volume of the support cases.

Bluebeam wanted to reduce the caseload and improve the customer experience by using their self-service resources to deflect cases before they reached the support team.

Solution

First of all, the team analyzed the nature of requests to understand the reason for their origin.

> *We took a step back to see the bigger picture - the reason behind the volume of support cases*
>
> *Travis Nilan, Support Documentation Manager, Bluebeam*

And for that, they looked at the data they had on hand and asked their support engineers a simple question, **"What are the top three to four questions that you answer every day, and what answers do you provide?"** Quickly, the top four most frequently asked questions and their answers became clear.

Then they decided to completely redesign their case creation page.

Here, one school of wisdom - the prevalent one - would tell you not to hide your case creation form, but to make it as easily available as possible. Hiding the form mars the customer experience. The other school, however, advocates hiding it or making it difficult to spot in order to deter the customer from creating a case, at the cost of customer satisfaction.

What Bluebeam here did was slightly different; they took the middle path. Neither did they hide the form, nor did they make it just a click away. They placed the form a couple of scrolls and an additional click away.

They added two folds before a customer reached the case creation form. In the first fold, they placed the **common questions** and links to the answers that they collected from their internal support data. Right after a user hits the 'Contact Us' button, customers land on this page and see these common questions in the first fold of the page. So, many of the customers find answers to their questions right there.

If they can't, the new page prompts customers to search. The team placed the **SearchUnify's search box** in the second fold. As a user types their query, SearchUnify's cognitive engine displays relevant results right then and there.

Something else?

Search topics and we'll help find you solution

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Setup |                          🔍
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Powered by SearchUnify

Is this what you're loooking for?

- **Page Setup I Revu 20**

  The page setup feature in revu allows for the resizing of pages in pdf file....

- **Page Setup I Revu 2019**

  The page setup feature in revu allows for the resizing of pages in pdf file....

- **Page Setup I Revu 2017 and Below**

  The page setup feature in revu allows for the resizing of pages in pdf file....

- **Page Setup I Revu 2018**

  The page setup feature in revu allows for the resizing of pages in pdf file....

- **Batch crop and Page Setup I Revu 20**

  Bluebeam Revu includes a batch cropping tool that allows you to remove....

SearchUnify's federated search fetches information from across all the indexed content silos and its cognitive technology displays highly **relevant results** based on the user query, user profile, history (purchase and support), as well as user maturity.

These results are **manually tuned** by the team as well to ensure that the most relevant content always displays on top. And the engine predicts the user query based on the letters they type and displays recommended results, which keep updating and refreshing as the user types the query. Most customers find the relevant result here and click on it and eventually end up abandoning the page without logging a case.

Month	Total Searches	Cases	Click Sessions - Stage 2 (Clicks and Exit)	Case Deflection Stage 2
March	22,200	56	155	5%
April	23,800	3200	84	2%
May	20,400	3000	71	2%
June	18,100	2300	33	1%
July	18,300	2100	311	25%
August	17,700	1700	392	32%
September	19,500	1500	336	24%
October	19,600	1600	313	20%

The team implemented the new design in June 2020, and they started seeing a dramatic jump in the **deflection numbers** in as immediately as the next month as the above chart shows. And this chart only represents the number of cases deflected of the customers who abandoned the page after using search and finding a relevant answer. The number of those who abandoned after finding their answer even before that - from the common questions - is even higher.
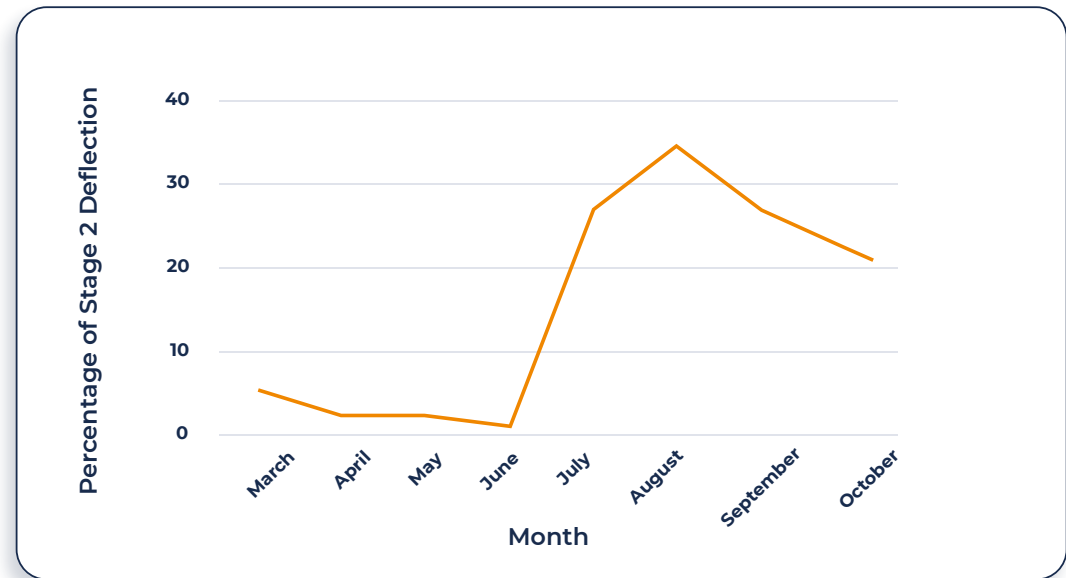
However, if someone still can't find a helpful answer and wants to log a case, they can scroll down and click the 'Contact Us' button, and the case creation form pops up. There's no search embedded in this form because they've already been prompted to search before. Customers can simply log their case and submit it here.

This approach proved to be the case deflection sweet spot for Bluebeam. They've been witnessing a staggering **25% deflection** at the second stage - the stage of case creation - which means that every one out of four customers who visit the 'Contact Us' page with an intention to log a case ends up finding an answer and not logging a case. That's something many support organizations only dream of achieving.

25%
Deflection at the Stage of Case Creation

46.5%
Average Clicks to Total Searches

62%
Deflection on Community Home Search

9%
Average Decrease in Searches with No Results

$12,000
per month savings in Support Costs

SearchUnify is a unified cognitive platform built on a core of cognitive technology, machine learning and an insights engine. It powers an intelligent search engine & AI-based applications including Intelligent Chatbot, Agent Helper, KCS Enabler, Escalation Predictor and Community Helper, that help elevate customer support & self-service. Its AI powers relevant and personalized search results for customer support and self-service. It indexes disparate content repositories, makes relevant content easily discoverable (on online communities, sites, customer portals, service consoles) and provides advanced insights into user search behavior, content usability, and content gaps – all while self-learning to personalize and keep responses within the context and ensuring the security of the enterprise data.

To see it live in action, **request a free demo!**

Let's Connect

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