

HOW SEARCHUNIFY HELPED IDAPTIVE TRANSFORM CUSTOMER SERVICE WITH AI-POWERED DISCOVERY & INSIGHTS

How an IDaaS market leader improved customer & employee experiences by replacing legacy search

Idaptive delivers next-gen access which protects enterprises from data breaches with a zero trust security model. It fortifies access to applications and endpoints by verifying every user, validating their devices, and smartly limiting their access. Idaptive Next-Gen Access is the only solution that seamlessly amalgamates adaptive multi-factor authentication (MFA), enterprise mobility management (EMM), single sign-on (SSO), and user behavior analytics (UBA). It is trusted by 2000+ organizations across the globe to secure their business.



INDUSTRY:
Information Technology
and Services



HEADQUARTERS:
Santa Clara, CA



SOLUTION:
AI-Powered Federated Search
& Insights Engine



SEARCH INSTALLATIONS:
Service Cloud, Community Cloud

ABOUT IDAPTIVE®

The firm created technical documentation in MadCap Flare so that some basic assistance was available round-the-clock. It also had a team of service representatives proactively working on Salesforce Console to provide additional help to those who needed it.

However, Idaptive wanted to take things to the next level by providing a more immersive and relevant experience. The primary objective was to unify results from both the repositories and deliver relevant results to support engineers. This would give them access to more case-resolving knowledge.

Idaptive aimed to integrate its Salesforce-powered support console with MadCap Flare-based technical documentation to ensure helpful information was never inaccessible for its support maven.



THE CHALLENGES

After meticulously analyzing their tech stack, Idaptive's management felt the need to migrate their existing legacy search architecture to a federated search solution that would simultaneously scan the above-mentioned repositories and retrieve unified results at the point of search.

To make it happen, the organization chose SearchUnify's AI-driven federated search engine. The ease of deployment, continual relevance learning, and seamless out-of-the-box integration offered by SearchUnify provided the agility quintessential to achieve the company's strategic support goals.

THE SOLUTION

Idaptive's Next-Gen Access cloud coincides perfectly with our goal to provide friction-less connectivity across platforms. With the deployment of SearchUnify, the firm enabled knowledge sharing in a more holistic manner. It securely integrated help documentation and case-resolving data and made them accessible on the support console (support agents) as well as help center (customers).

In addition to showing apt results from disparate sources, Idaptive could now elevate the search experience with automatic and manual rank optimization. It also had the ability to track user behavior, view search queries and their outcomes, content usage, top conversions, etc. All these key metrics were displayed in an intuitive dashboard which enabled them to dig deeper into search usage and conduct an effective content gap analysis.

THE SOLUTION

THE IMPACT

SearchUnify's customized solution created a significant impact on the way Idaptive gleaned insights from its community and delivered customer service within the Salesforce console.

The implementation of an AI-powered federated search elevated the customers' discovery experience and enabled service engineers to be more productive and provide personalized customer service.

With SearchUnify, Idaptive was able to:

- Unify information from all enterprise sources
- Tune search results for relevance
- Quantify user's search behavior
- Fill content gaps with deep insights
- Tailor support with visibility into customer journeys
- Customize UI with advanced facets
- Ensure secure native connectivity with each source



15%

INCREASE IN AGENT PRODUCTIVITY

92%

CSAT

21%

INCREASE IN CASE DEFLECTION

13%

INCREASE IN SEARCH CONVERSIONS

28%

REDUCTION IN SEARCHES WITHOUT RESULTS

Keeping in mind the progress made so far, Idaptive is excited to harness the power of AI to enhance agent productivity, boost first call resolution, increase CSAT and drive KCS. Here's how:

1. BRING DOWN FIRST RESPONSE TIME (FRT)

We're working on empowering service representatives to quickly send out first responses by choosing one of the suggested answer templates. The ML-based functionality will examine previous responses to similar cases in order to recommend message content that agents can revert back with.

2. AUTOMATE ARTICLE CREATION

To enable effortless creation of new KB articles for unreported issues, SearchUnify will pick up vital information from the case conversation and use it to populate a brand new article. This will motivate agents to pitch in with content creation and help to drive KCS.



THE ROAD AHEAD

“ We wanted our service engineers to utilize the immense KB to its full potential. However, finding case-resolving content wasn't particularly easy. They needed to wade through the countless irrelevant results in a bid to find helpful content. After implementing SearchUnify, the quality of support improved significantly as our support heroes could access relevant information from MadCap Flare inside Salesforce console. Similarly, customers could also access more relevant content within the Help Center. We got more than we asked for and for that a big shout out to the folks at SearchUnify. ”



RAMAN KUMAR

SVP - Customer Success,
Idaptive

THE TESTIMONIAL

LET'S CONNECT



www.searchunify.com



info@searchunify.com



USA +1 650 603 0902

India +91 987 854 2223

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