



JENNIFER MACINTOSH



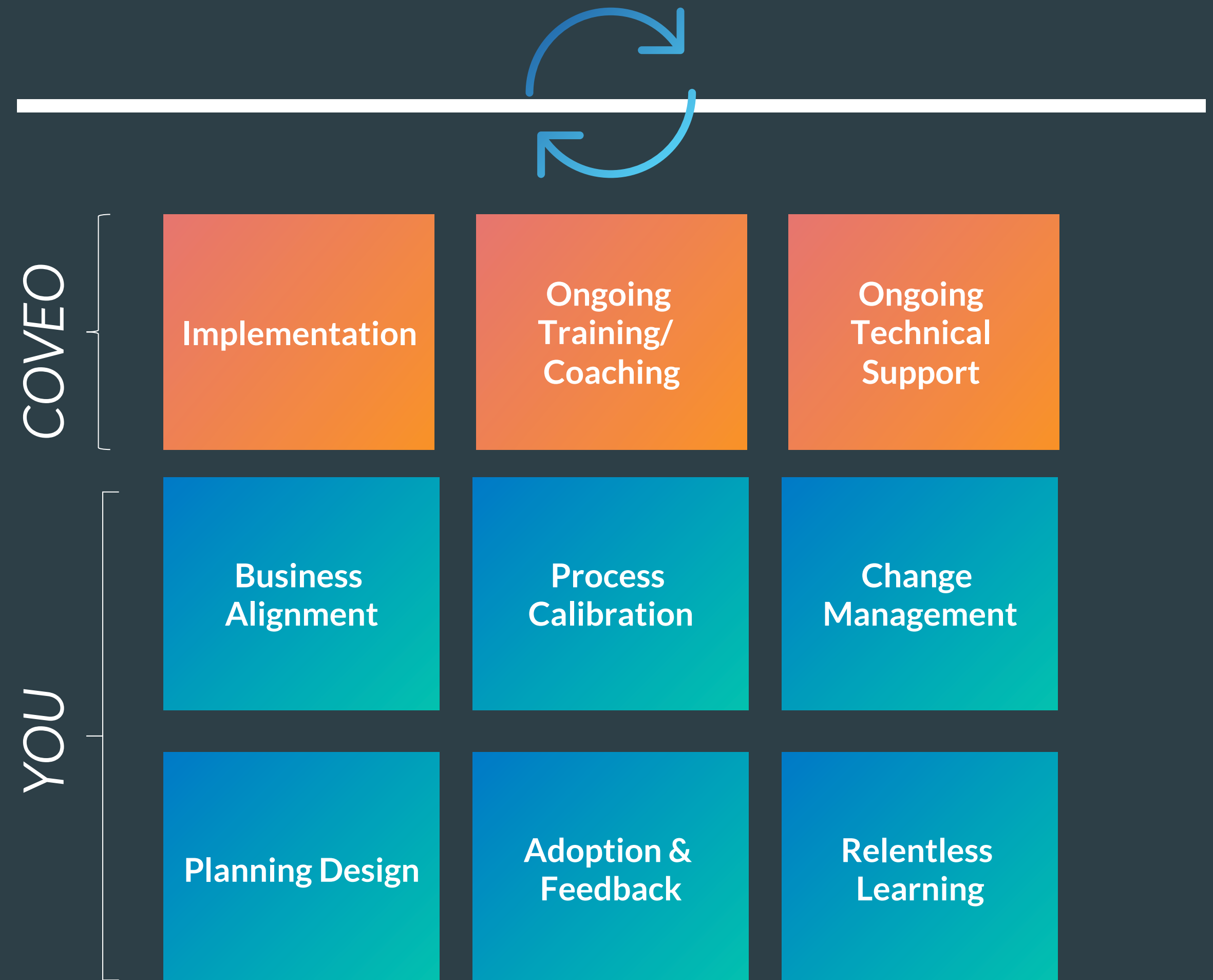
VP CUSTOMER EXPERIENCE  
COVEO



Bridging the Gap  
between CX & CS

# CRITICAL SUCCESS FACTORS

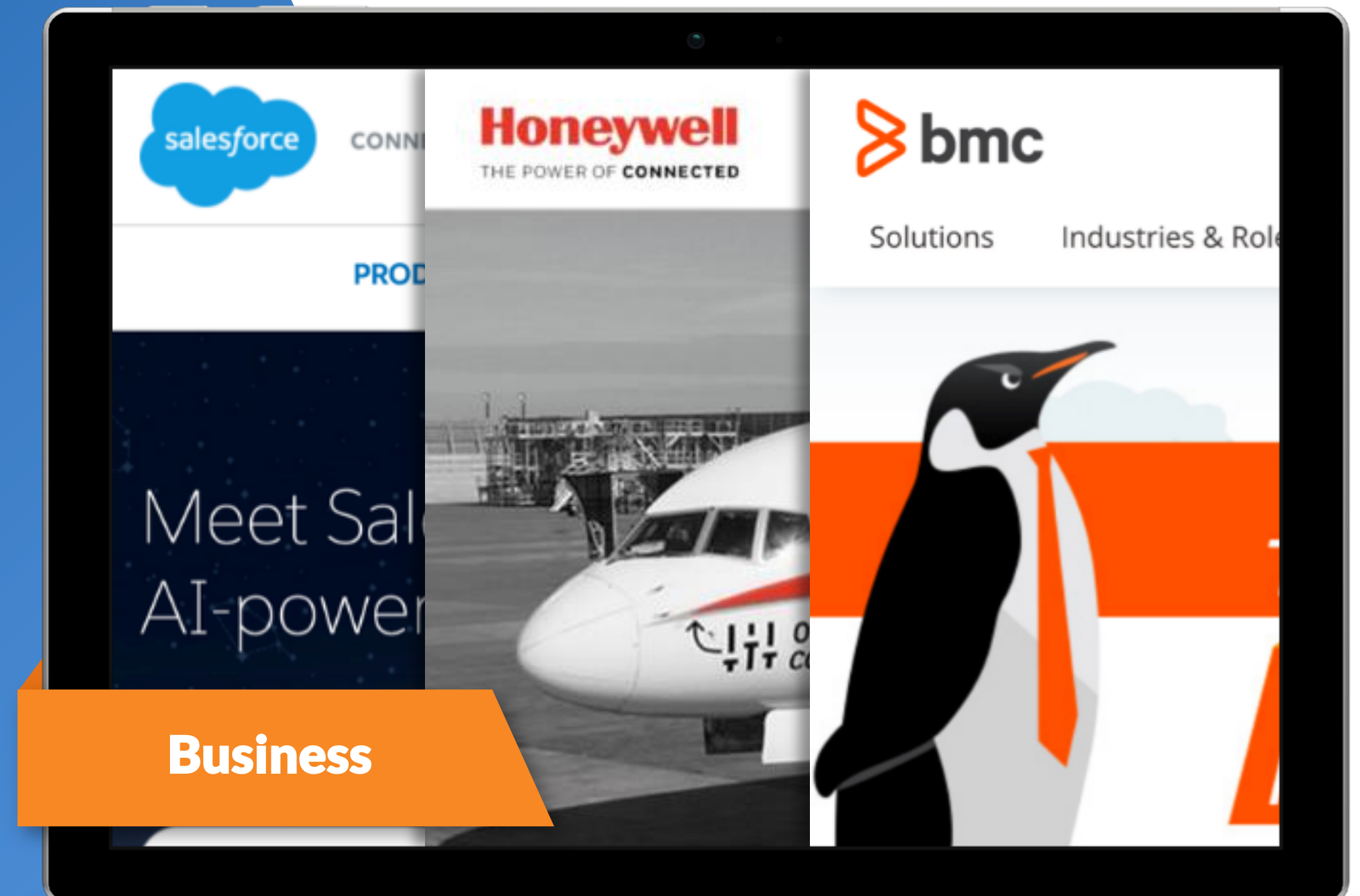
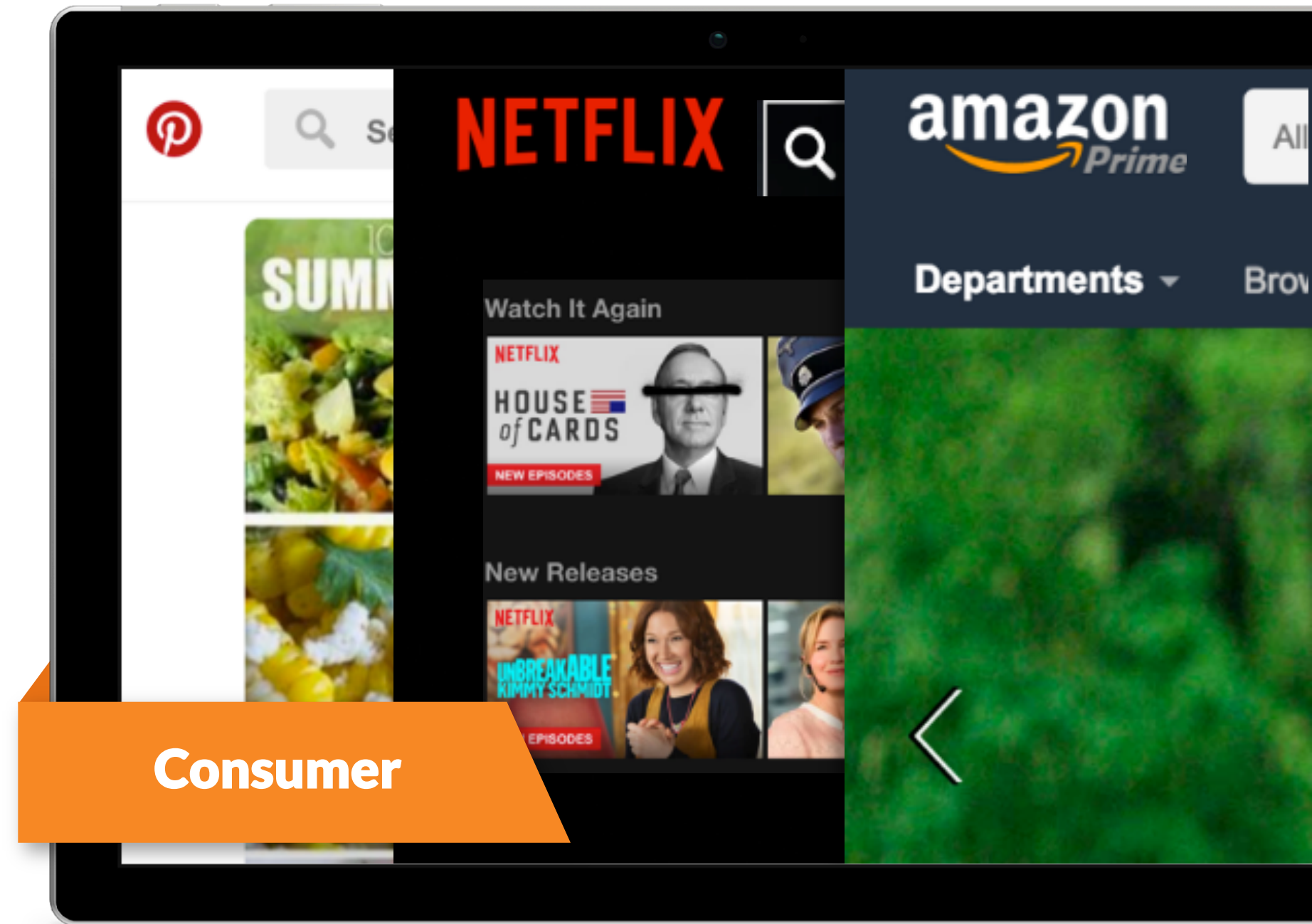
## Coveo Technology



# About Coveo

Customers & Employees  
Expect Personalized, Relevant  
Experiences

With Immediate Answers  
& Contextual Recommendations



# Businesses are waking up to the power of Community



- Managing communities has often referred as being an art, driven by trial and error and a steady dose of behavioral psychology. -

There is a race towards mass personalization

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“**68%** of firms in a Forrester survey state that delivering personalized experiences is a priority. **53%** lack the right technology to personalize.”

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FORRESTER®

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So why aren't all  
enterprises doing this  
already?

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# Enterprises are still heavily siloed, with different focuses, goals and metrics

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## Commerce Focus

- ▶ Marketing
- ▶ Sales
- ▶ eCommerce



## Customer Focus

- ▶ Support
- ▶ Service
- ▶ Success



## Colleague Focus

- ▶ Product
- ▶ Operations
- ▶ HR, IT

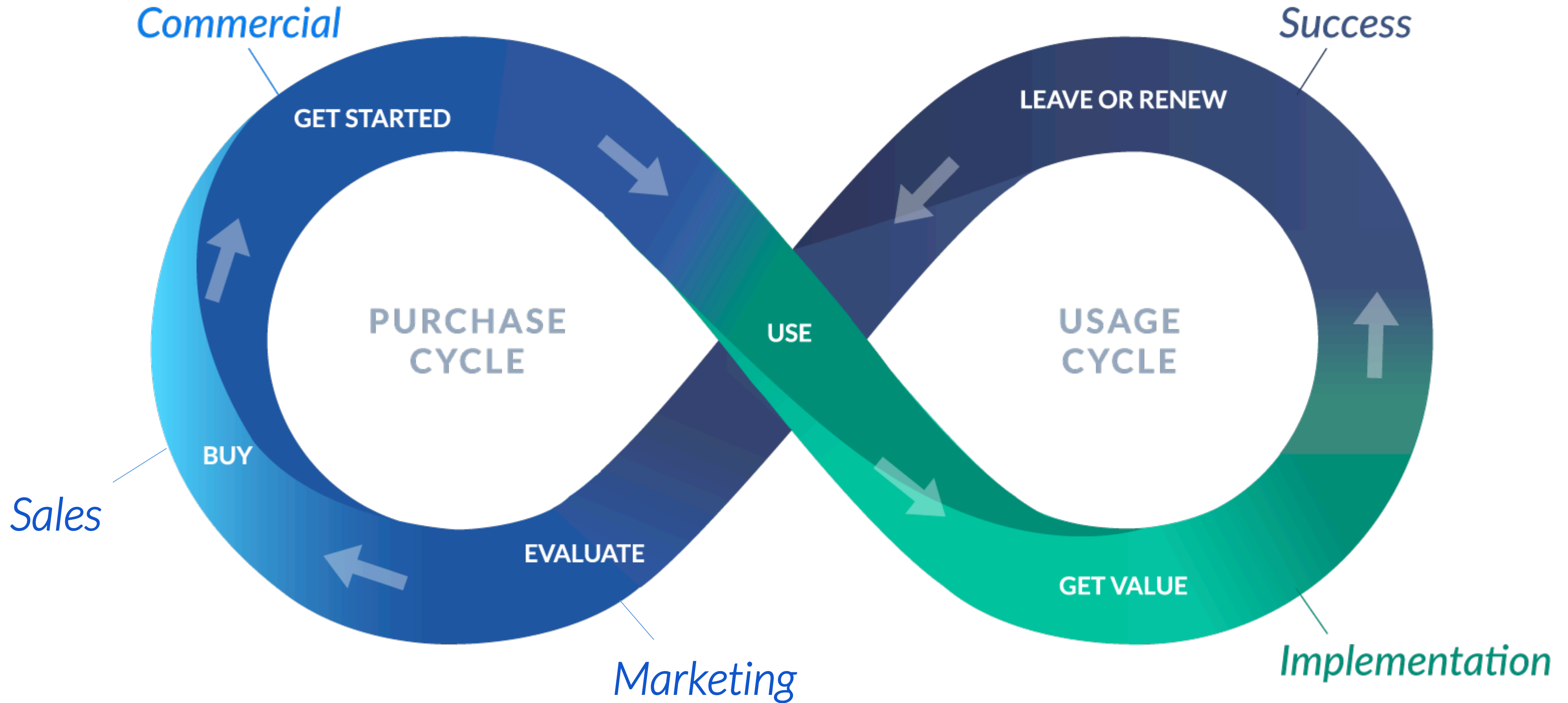
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Customer Success &  
Experience =  
Engagement

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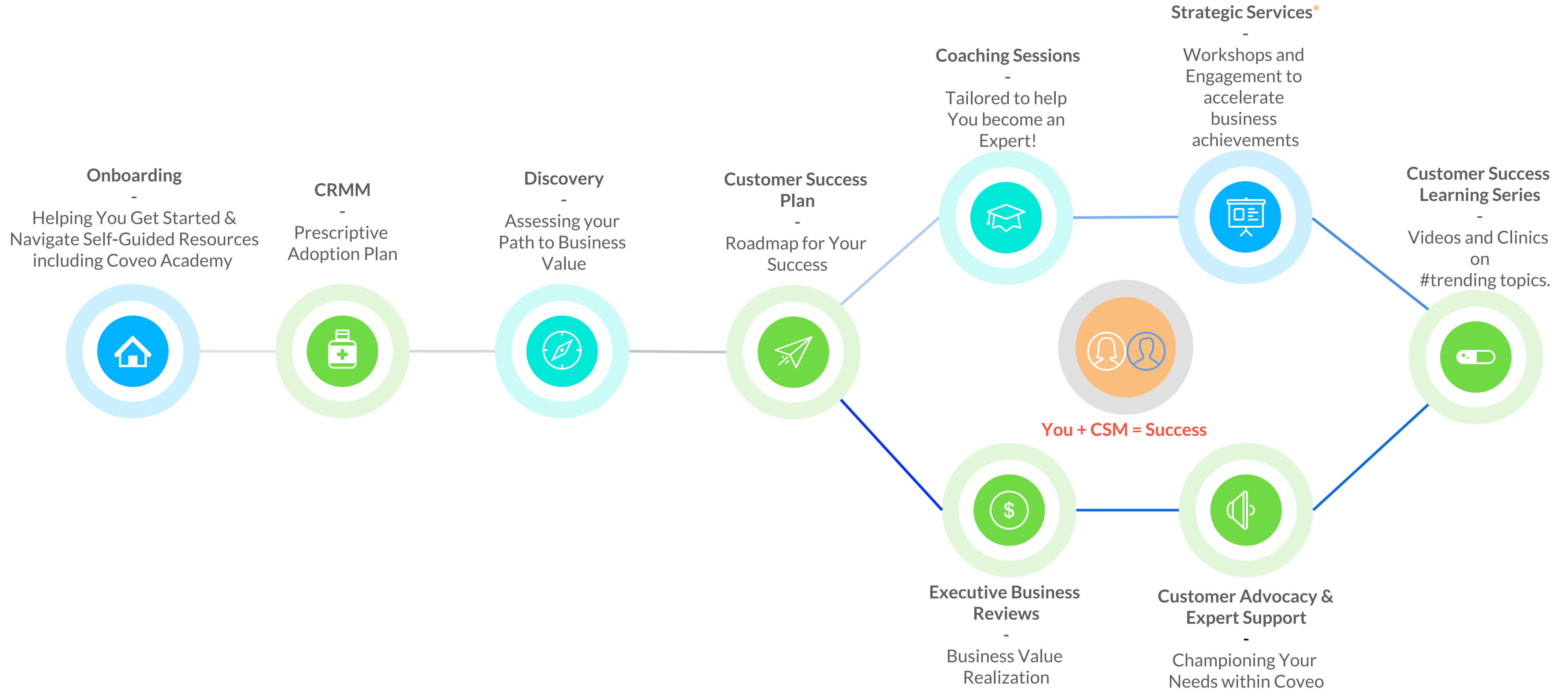


# Customer lifecycle vision

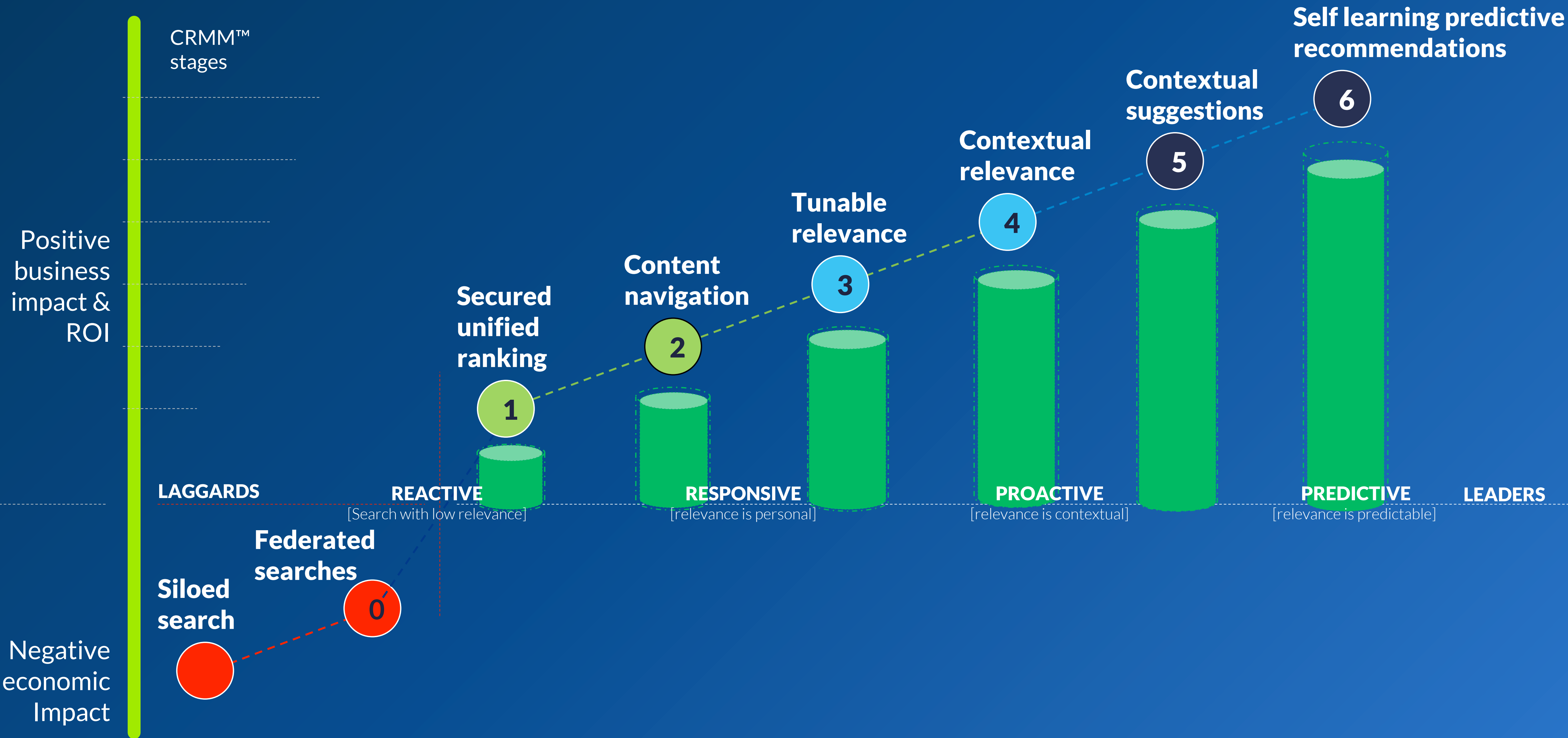


# Coveo Customer Success & Support Plans

Your Journey with Coveo, Led by Customer Success Managers



# Coveo Relevance Maturity Model™



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How are we tackling this  
challenge to scale?

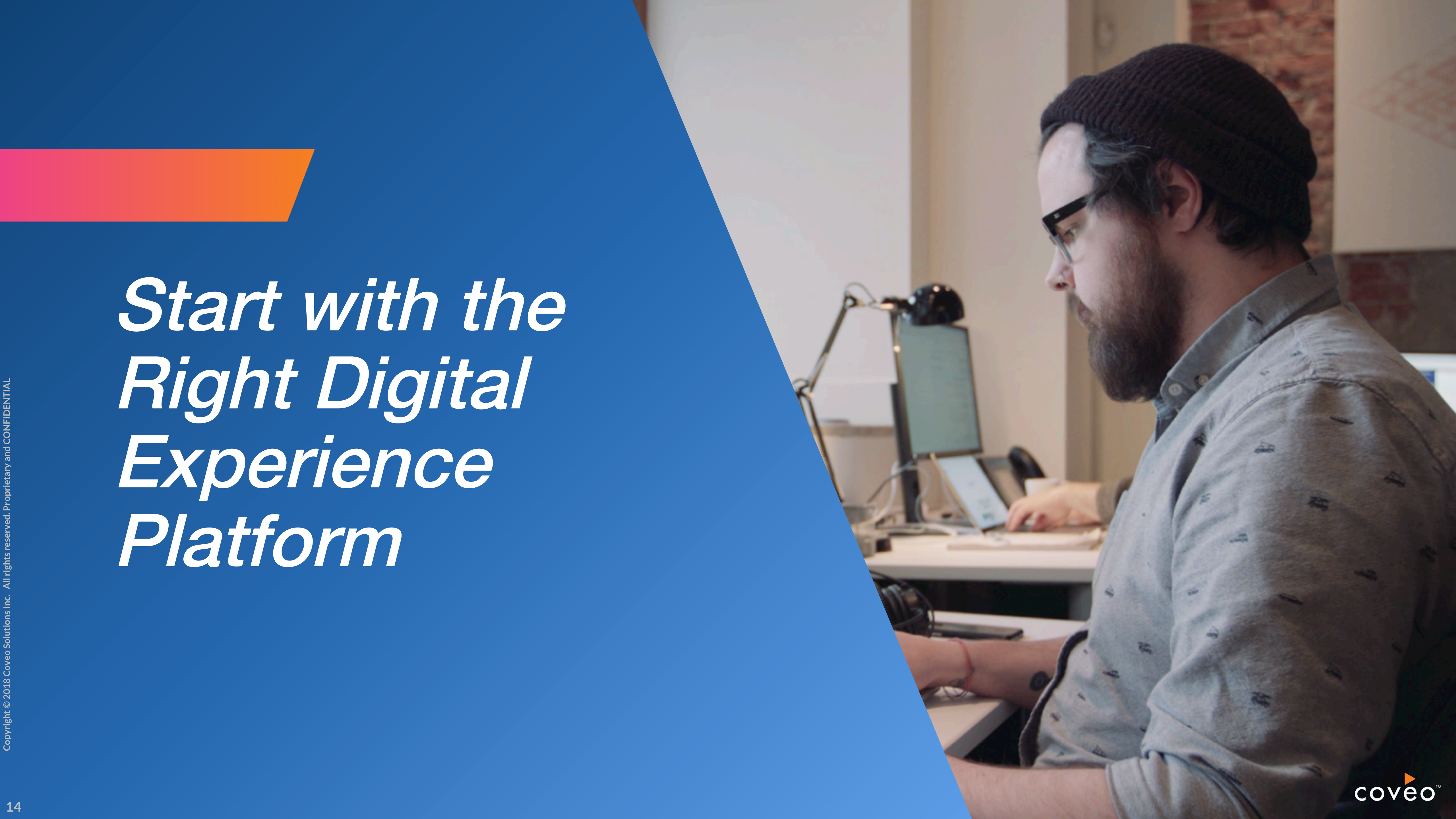
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# ADOPTING A RELEVANCE STRATEGY AT COVEO



**CUSTOMER**



*Start with the  
Right Digital  
Experience  
Platform*

# Changing a mindset: Rethinking the Support Portal



**Focus on the visitor first:  
What are they trying to do?**



**How do you get them to  
come back?**



**Learning is a key  
onboarding & adoption  
strategy**



**Unify the experience. Search  
doesn't have to be a search  
page**

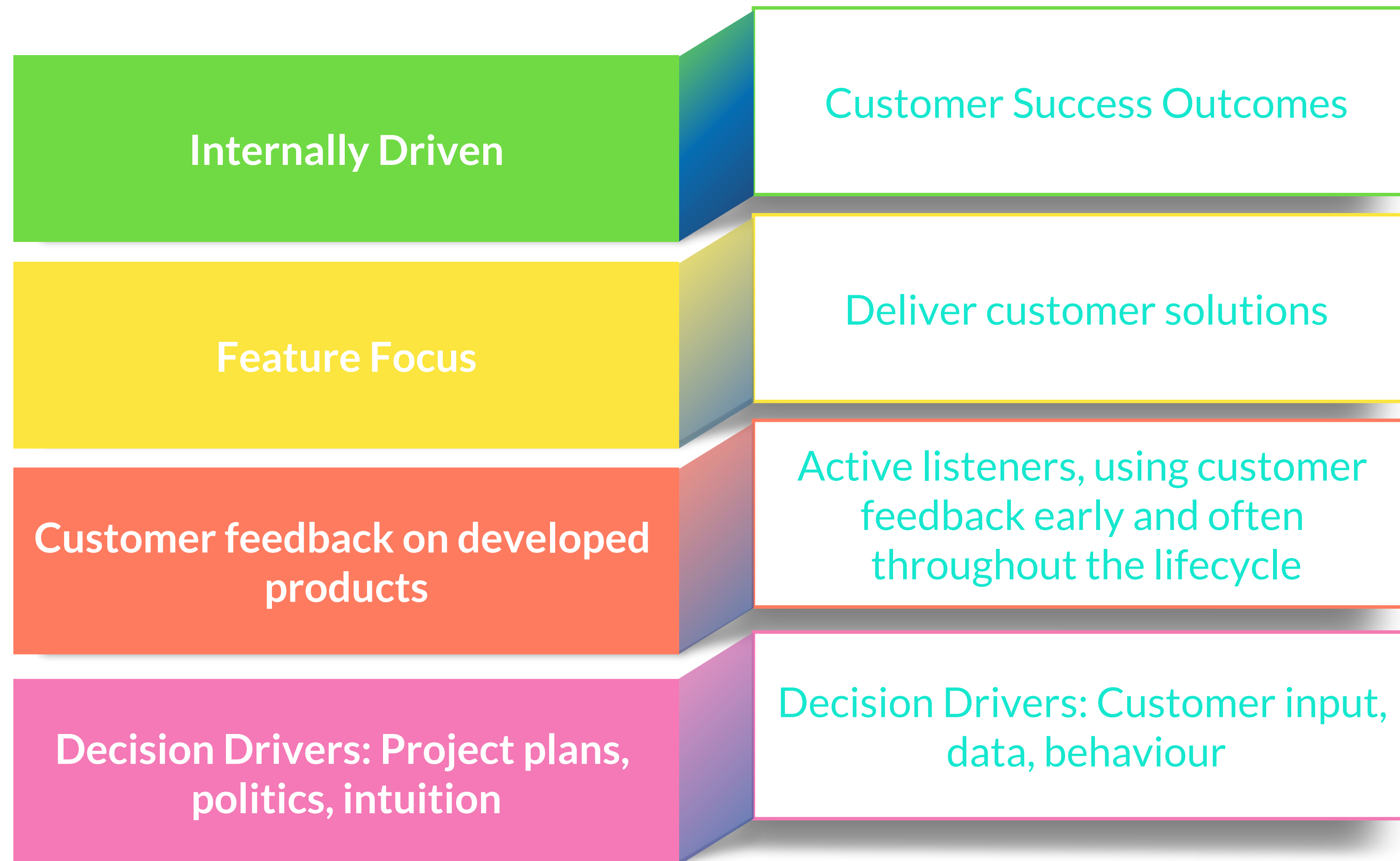
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Success is a Customer  
Engagement strategy, not  
a case deflection tactic

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# Changing a mindset: The Evolution



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# COMMUNITY

The sum total of its parts a personalized engagements experience, knowledgebase, peer-to-peer forums, groups, product documentation, case management, learning paths, news, alerts, adoption, product roadmaps, EBRs and more

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# Customer Experience from a Digital Perspective



## Make our sites Relevant

Bringing the most up-to-date, appealing and value based content.



## One Coveo search for all domains

There's a strong will to make it happen



## Always be THE Coveo showcase

Coveo as Customer #1, Reinforce ties with R&D to make our websites our best sales tools



## Visually ON brand

Look as great as our ambitions



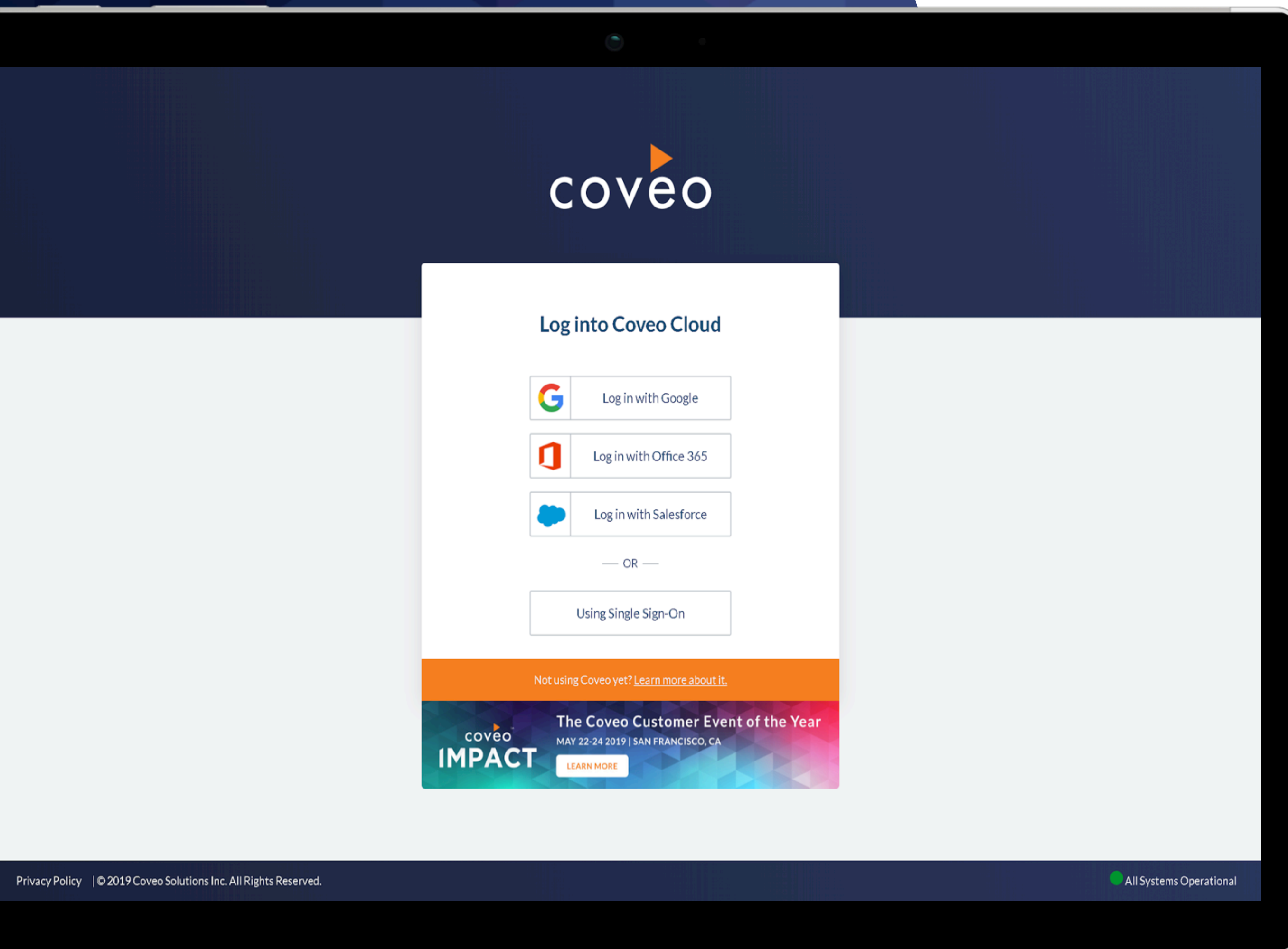
## Seamless Integration on all domains

Reduce friction for our clients when switching from one site to another



## Experiences

That reflect a customers journey, providing what they need, and what they need next



# Coveo Cloud Single Sign On (SSO)

## One login for all digital properties

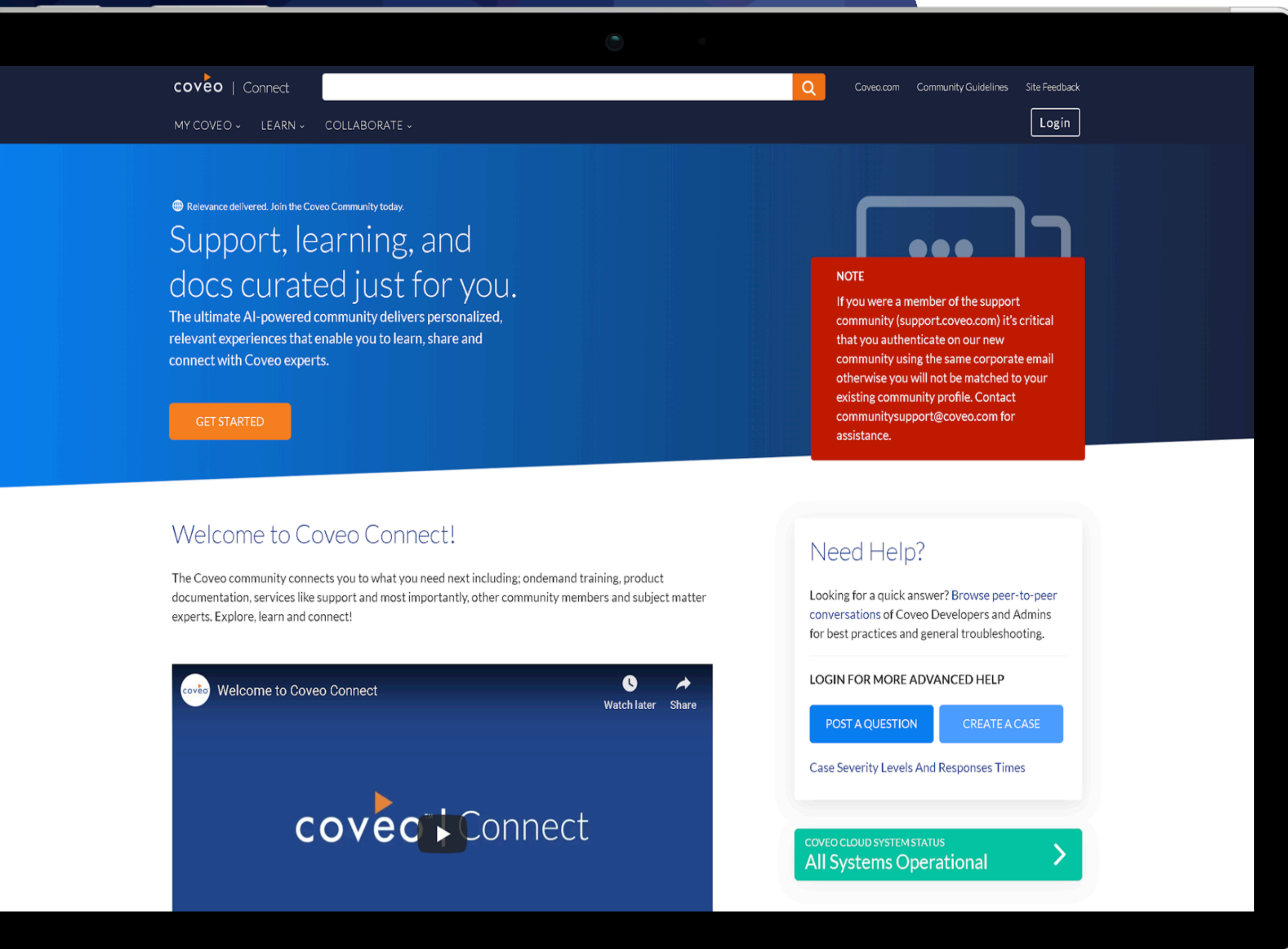
- Third party identity management
- Best practice security practices
- Significantly improved user experience

## ▪ Access

- Coveo Product Admin, Community, Academy

## ▪ Starts the “Welcome to Coveo” process

- Get access to the community



## Adopting a Relevance Strategy at Coveo

# Welcome to Coveo Connect

## AI powered personalized experience

- Customer & Partner Onboarding
- Collaborate with peers and Coveo

## ▪ Share

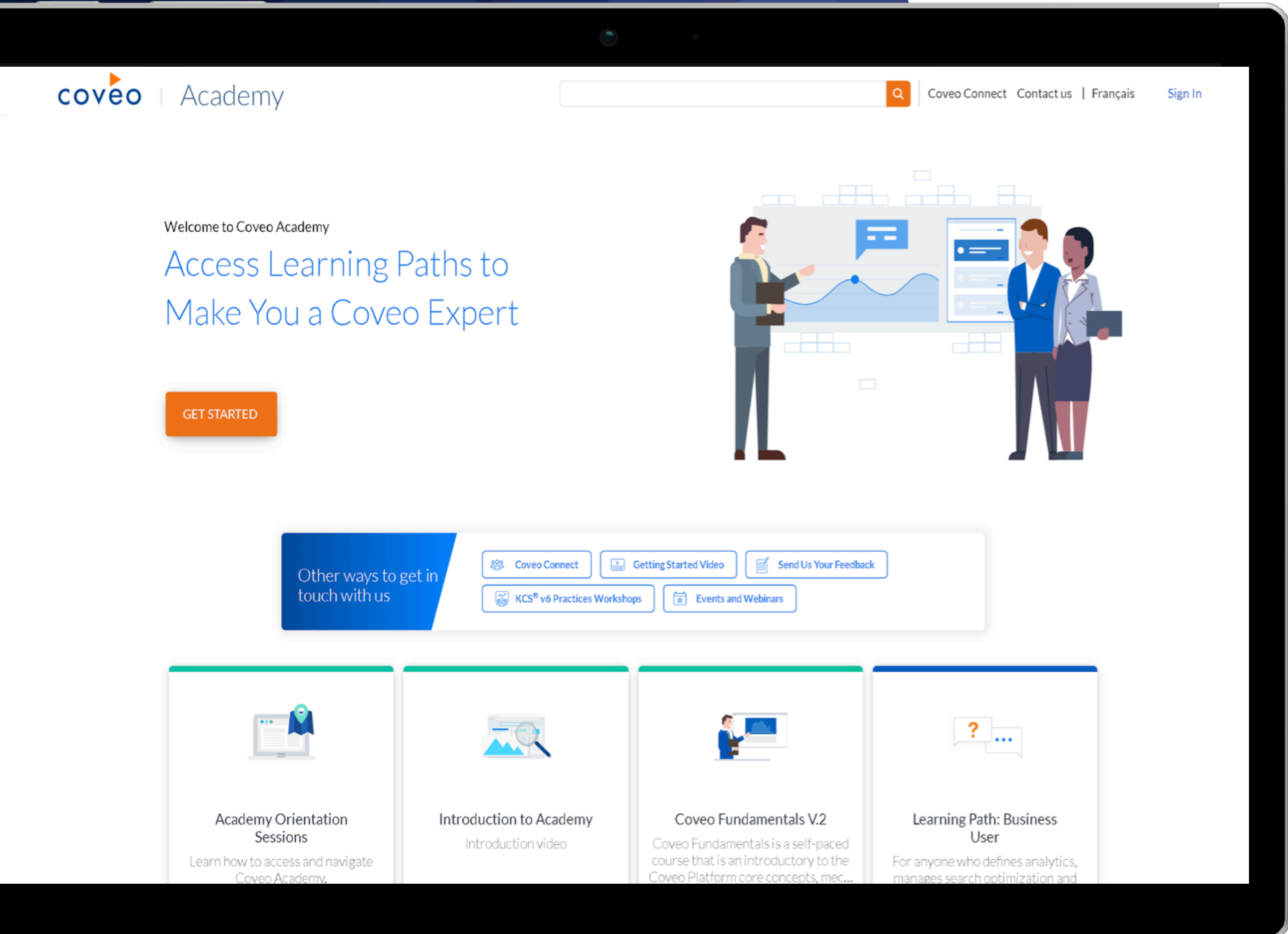
- Experiences, knowledge, best practices

## ▪ Learn and get value

## ▪ Manage profile & support cases

## ▪ Unified Search

- Product Documentation, Forums, Knowledge base, previous cases, blogs. etc.



[academy.coveo.com](https://academy.coveo.com)

# Coveo Academy

Cloud based Online LMS

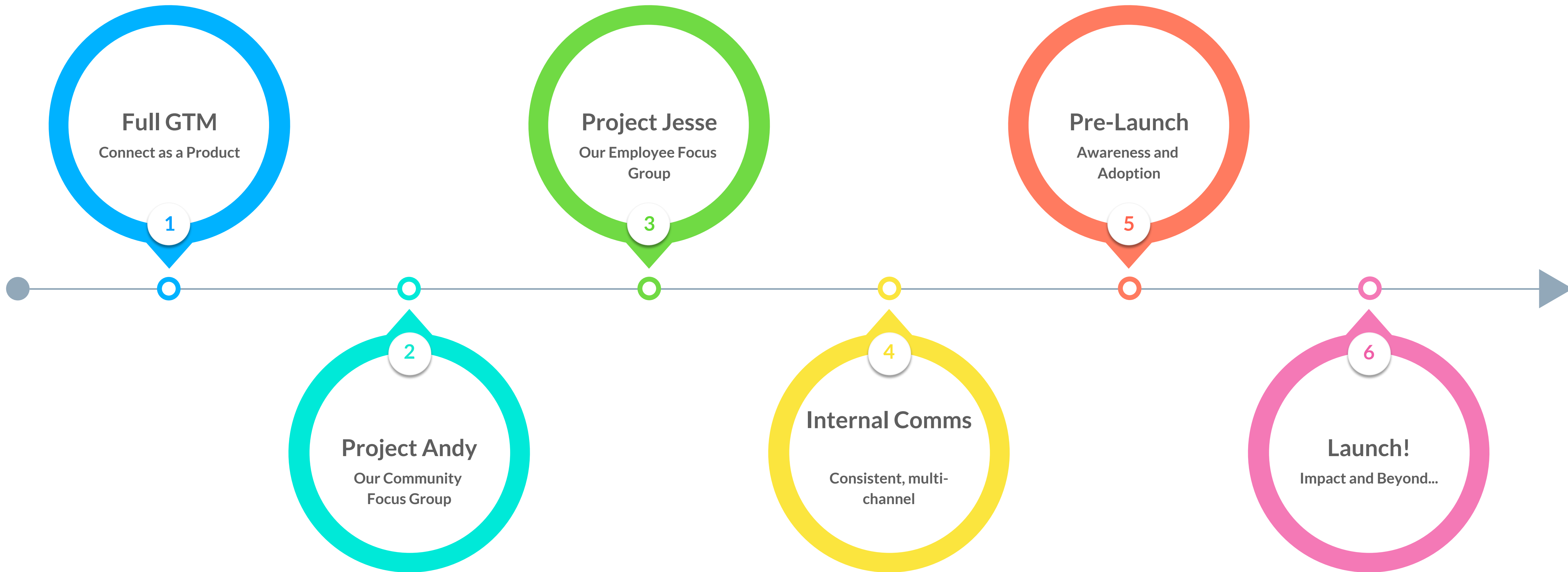
Learning paths of curriculum for

- Customers, Partners & Employees

Integrated in overall Community experience

Key to Customer Success, adoption and value realization

# Communications Strategy



# Overall DX Technology stack at Coveo

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# Measures of Success

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1

## Engagement

Monthly Logins

New Users

3

## Time to Value

Course completions

CRMM

2

## Self-Service Success

Increase Online Resolution/  
Case Deflection

4

## Advocacy

Satisfaction/NPS

Expansion



# Results so far for Coveo Connect – One quarter of results

**16%** Increase of new community users

**195** Questions asked and answered in the community

**12%** Increase in NPS (42 to 47)



# Lessons Learned

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- 1 ADOPT A PHASED APPROACH**  
If you think you can do Big Bang think again, it adds undo risk and pressure
- 2 LEARN AND ITERATE**  
Look at data, metrics, analytics and results and keep improving.
- 3 DON'T UNDERESTIMATE THE LEARNING CURVE**  
You can do almost anything with Salesforce Community Cloud & Coveo. But training teams on new systems and processes takes time.
- 4 OVER COMMUNICATE**  
Prioritize messages. Use multiple channels, and media. Say it differently
- 5 THINK BEYOND THE SEARCH BOX**  
Anywhere you have a content repository, you can use search to dynamically display it.
- 6 MARKETING IS AN IMPERATIVE**  
To be successful, you'll need to market this new product just like any other commercial product you sell.

# Spend time in your customers shoes

- **Pick a data point, step in a playbook and journey map it**
- **Evaluate self-solve-ability**
- **Assess your Community**

This is what your customers want  
and  
This is what will help you scale





# CS100SUMMIT

*Presented by*

client**success**