searchunify ™

Delivering AI-Driven Enterprise Search to Empower Self-Service

25%
increase in site visits per month

20%
increase in the number of searches per month

" I particularly love the fact that we are able to securely share relevant information from all our portals with the ultimate goal of achieving greater self-service and case-deflection.

James Goerke
Manager, Global Support
Vlocity

THE CUSTOMER

Vlocity is a San Francisco-based cloud and mobile software provider that empowers companies to deliver a unified and industry-specific customer experience. As one of the fastest growing companies on the Salesforce AppExchange, Vlocity enables organizations to achieve greater sales and service agility.

THE CONTEXT

Vlocity owed its success to knowledge sharing and the expeditious support provided by their customer community and service agents. However, given the rapid expansion, it became a herculean task to continue to deliver the same level of service. Moreover, with their customer community on Salesforce and documentation in MadCap Flare, they were having a difficult time unifying search results for both these platforms, and delivering relevant and personalized search to customers and support engineers.

THE OBJECTIVES

The primary objective was to display relevant and personalized search results for customers and support engineers. Vlocity wanted to integrate their Salesforce-powered customer community with their MadCap Flare-based technical documentation. To continue improving the quality of their help content, Vlocity wanted an enterprise search solution that could provide cross-channel search as well as content gap analysis.
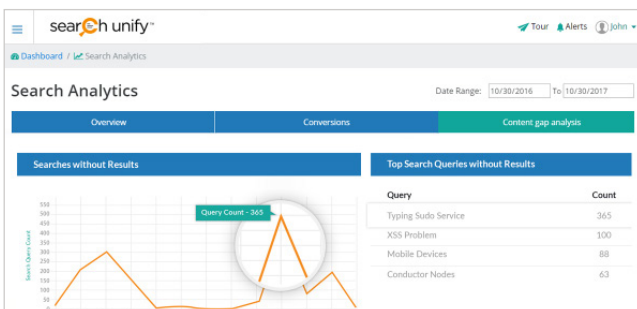
THE SOLUTION

- In order to ensure **cross-platform search** results and enable knowledge sharing in a more holistic manner, our engineers deployed SearchUnify to the customer community. It securely integrated help documents and product documentation residing in various platforms and made them accessible on the community.

- In addition to showing relevant search results from across platforms, SearchUnify also helped Vlocity to optimize search results. This enabled them to have better **control on search results** with manual boost feature for the most relevant content pieces to increase their ranking in search results.

- They wanted to identify gaps in their content, **track users' search behavior**, view search queries with minimal search results, content usage, top conversions, etc. SearchUnify's analytics dashboards enabled them to drill down and uncover deeper insights into search queries, and conduct effective **content gap analysis**.

- Vlocity was focused on improving case deflection while reducing support-associated costs. SearchUnify's **suggestive search** feature enabled their users to see relevant help articles from all integrated knowledge sources and auto-complete their search queries.

- Using SearchUnify, Vlocity could leverage the product's **intelligent search reporting** feature that allows to **use synonyms** unique to their organization. They could also subscribe to reports related to search queries, receiving automated email notifications for specific keywords.
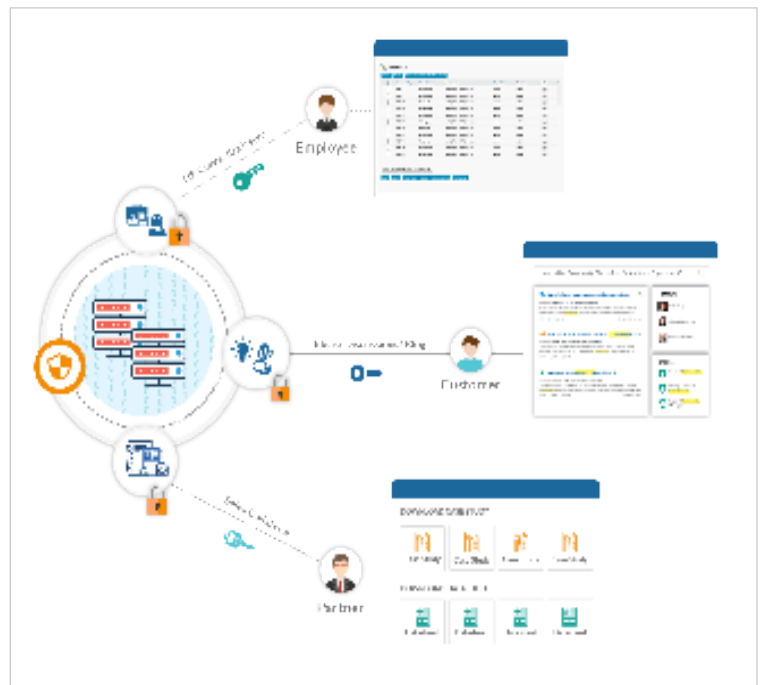
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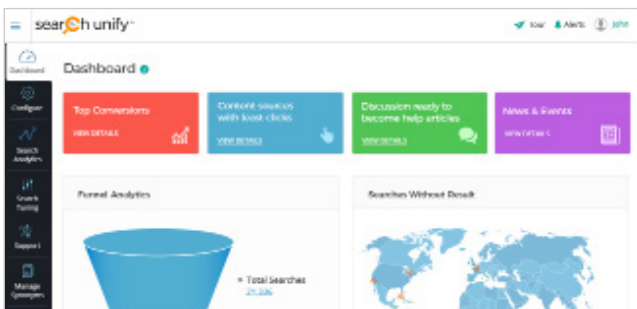
Content Gap Analysis

Information Security

ABOUT SEARCHUNIFY

SearchUnify is an AI-powered enterprise search solution that delivers relevant and personalized search results to your users and provides you with real-time search insights into content performance. Drive self-service support while improving support efficiency and customer satisfaction.