

Consistency, Collaboration and Agility Are Keys to Garnering Customer Loyalty

Bolstra's Agile Platform Helps Coveo Deliver High Value Customer Success



Coveo makes business personal by bringing relevance to every interaction. Powered by artificial intelligence, unified search, rich analytics, and machine learning, Coveo AI™ delivers predictive insights from across all cloud and on-premise systems that allow a business to continually improve and scale. To maximize the value their customers gain from using their solutions and ensure

positive business outcomes, Coveo delivers high-value adoption services through their Customer Success organization. Knowing what their customers need the most and how best to package and deliver those services requires an agile approach; **understanding what customers need and the work and resources involved, delivering the work consistently across the team, managing the capacity of the team efficiently, and working collaboratively across departments to ensure customer delight.** *All of this has been made possible using Bolstra.*

The Problem

Running a Customer Success team that consistently delivers value is challenging without a solution that enables consistent, transparent workflow, collaboration, and accountability.

Jennifer MacIntosh (VP of Customer Success at Coveo) has built a menu of expert service offerings to help her customers make better use of their robust software, and, therefore, gain greater value from it. As she chartered and built her Customer Success organization, Jennifer sought first to understand what work the team was doing, could be doing, and would be of value to their customers.



“My goal was to figure out how we were going to build a team of trusted advisors, what services we could (and should) offer our customers, and how we would structure and package these offerings to consistently deliver value to our customers.”

— JENNIFER MACINTOSH, VP OF CUSTOMER SUCCESS, COVEO

Her first priorities were to determine:

- what “fires” were being put out that could be prevented with the right services
- which customers needed what services
- what types of resources they needed to properly provide those services, and
- (most importantly) how to package and deliver those services to provide consistently high value

Once MacIntosh began to formulate a plan for what her team would look like, what services she would provide, and how she would structure their offerings, **she knew that making the program successful couldn't be done without accurate data about the work involved in delivering these services.**

The Solution

Bolstra's work management and time tracking capabilities are the keys to successfully delivering Coveo's expert services

It became evident for Coveo that to get their Customer Success to a mature state, they had to have a firm handle on the work involved in providing their services, to manage that work continuously, and ultimately, to be able to make adjustments in an agile fashion. Using an “iterate-fail-fast forward” approach to building out their offerings, MacIntosh and her team began to hone their tiered packages and standardize their approach. Assessing the effectiveness and value of their services was (and is) an ongoing process, which is enabled, in large part, through Bolstra's agile success management platform.

When Coveo decided to adopt Bolstra, they did so because they could easily see how their need for understanding the team's work effort and being able to deliver the same high-value expertise every time could be addressed using the Bolstra platform.

“*As we crafted our menu of offerings, we knew we would have to iterate, fail and fast forward to get a clear grasp on how much effort and which resources we would allocate to which services. This continuous effort to fine tune our offerings required **knowing** our work effort, capacity, and resources.”*

— MACINTOSH



The Value

Adopting Bolstra has been the key to being able to optimize Coveo's Customer Success organization to bring the greatest value to their customer.

In adopting Bolstra to manage their Customer Success organization, Coveo has gleaned:

- full visibility into their team's work
- the ability to customize playbooks for their specific offerings
- healthscoring capabilities
- a strong cultural fit
- a true partner (not just a platform)

MacIntosh and her team chose Bolstra because they could easily see their model come to life and flourish through the platform and in partnership with the Bolstra CS team.

“““

Bolstra has what we need. It has activity/work management, time-tracking, and touchpoint logging, which provide us the data we need to accurately understand, assess, and deliver our services. It's the ideal agile technology for our model.

— MACINTOSH

coveo™ + bolstra



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