

Citrix

Finds self-service success with Bold360

Bold360 gives Citrix the ability to offer a simple self-service customer experience solution that provides answers to numerous questions quickly, reaching more customers than ever before.

Challenge

Since 1989, Citrix has provided small, medium and enterprise businesses with a digital workspace platform that gives employees everything they need to do their best work wherever and whenever, in one unified experience, while also arming IT with the visibility, simplicity and security needed to manage the solution effectively.

As Citrix provides solutions to a wide variety of users, the customer service team needed to reduce call volume on a growing backlog of questions from non-technical end users, as it was beginning to impact the firm's overall Net Promoter Score (NPS). "We have traditionally offered self-service solutions, like support articles and community discussions, to enterprise IT admins. However, self-service is not a one-size-fits-all solution, so we had to adapt our approach to fit the needs of non-technical users," said Patrick Quinlan, Senior Manager, Self-Service & Analytics, Citrix Shared Services. "We were charged with reducing incoming volume while maintaining high customer satisfaction."

The team opted to extend existing self-service options, including discussions on the website and live chat, by building a chatbot that could answer common questions without agent intervention. However, after two years of exploration and development, Quinlan's team realized that while many AI technologies are available as a service, building critical authoring and reporting interfaces would be prohibitively expensive. After reviewing several out-of-the-box solutions and

CITRIX®

10,000+

questions asked per month

60%

answered without
agent intervention

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Senior Manager,
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completing proof-of-concepts, the team found the right solution with Bold360 and quickly won approval from the leadership team in implementing a chatbot.

Solution

Citrix opted to implement Bold360 in a phased approach, targeting specific use cases to ensure a positive experience for their customers and internal support team. This phased approach allowed Citrix to remain agile and pivot quickly throughout the process to maintain helpful interactions with all customers.

“What we found to be successful was keeping those use cases really narrow. Citrix has a lot of solutions, so we wanted to start just with ShareFile and those small and medium size business users. Shortly after launch, we added general customer service actions like password reset tasks for our enterprise customers. Keeping the focus narrow, understanding what our customer is likely to ask, and then making sure we have our content in place to answer those questions before launch is what made our rollout successful,” Quinlan said.

Citrix learned that while it could prepare custom content and plan for many of the questions customers might ask, there were still unexpected queries. During the first few months, the bot received a high volume of questions related to pricing and product discovery, and, as a result, Quinlan’s team expanded their Bold360 solution to the sales team. This has helped generate new leads for sales while ensuring all customer questions are routed to the right team.

Results

Since the chatbot launched, it is receiving more than 10,000 questions across 5,000+ unique users per month and answering 60% of them without agent intervention. And although the volume of questions is growing, Citrix has not needed to expand its customer team to manage the surplus or left customer questions unanswered. The team has also experienced a dramatic reduction in call volume.

The use of the chatbot along with Bold360’s reporting is uncovering unexpected benefits. The real-time dashboard tracks what question is asked, how many times it is asked and if it was properly answered. This data doesn’t just help Quinlan’s team improve the bot’s effectiveness; it also illustrates user experience issues that need to be fixed in the product. For instance, as the team saw a growing number of questions about file uploads, it worked with the product team to improve that experience for users.

Since the initial launch for supporting ShareFile customers, Citrix extended the solution to other product lines like Podio and is also exploring use of Bold360 by their internal help desk team.