

&gt; Customer Success Story

## Intuit Builds Stakeholder Value with Hummingbird

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— Alice Adair, Manager, Systems Development, Intuit

### Industry

High-tech

### Organization

Intuit Inc.

### The Challenge

- > Intuit required a single, unified search engine to help customer service centers provide superior customer service
- > IT department needed a fully functional knowledge management solution to reduce the time and cost of servicing four different existing platforms
- > The new search engine had to be able to reference content in different locations, provide keyword and phrase searching, allow multiple filters on searches, and rank search results

### Hummingbird Solution

- > Hummingbird Enterprise™ KM

### Key Benefits

- > Up to 100% increase in the number of successful searches for some groups
- > Increase in effectiveness of handling calls
- > IT staff able to eliminate four separate business systems with single Hummingbird solution
- > Single search engine with comprehensive result sets allows multiple filters and drill-down ability into each search, thereby improving search precision

Thanks to the widespread popularity of its suite of products and services, including Quicken® and QuickBooks®, Intuit has become the world leader in helping individuals and small businesses manage their finances. As expected of a company whose products touch the bottom line of millions of individuals and enterprises, Intuit considers its customer-support operations a mission-critical part of its business. Through its constant interaction with customers since the company's inception in 1983, Intuit has amassed a huge internal knowledge base about its own products, which it uses to find known solutions to problems customers may encounter.

When Intuit decided it needed a Web-based knowledge system, the company struggled to find a search engine technology that would allow for fast and powerful functionality. After implementing several different software packages that didn't meet all the requirements, Intuit found the answer to its problems: Hummingbird Enterprise™ KM.

“Our internal knowledge base is always searched first in an effort to find a known solution to a problem being reported by a customer,” said Alice Adair, Manager of Systems Development for Intuit's System Support Department. “The success of the knowledge base searches directly affects our ability to provide superior service to our customers and reduces costs associated with handling support calls.”

### One Is Better Than Four

When Adair and her staff first tackled the search engine problem, Intuit had four different legacy software packages deployed across its call-center operations. Talking to internal users in its four product support groups, Adair found out that all four search engine products were used to some extent with no identifiable preference among any of the groups.

“People usually had a little complaint about one or the other,” Adair said. The internal users tended to align toward a particular product by business unit, choosing the one that each group decided caused the least amount of pain. None of the four software packages in use, however, fulfilled Intuit's demands for quick, precise information searches. “Providing superior customer service through efficient ‘first call resolution’ is a priority for Intuit,” Adair said. “This better serves our customers and reduces operating costs by limiting the length of time spent on a call.”

When Adair and her team put together a wish list of capabilities, their preferences centered on several features. Adair stated that Intuit needed a search engine that could reference content in different locations, provide keyword and phrase searching, allow the use of multiple filters on searches, have the ability to refine a search, provide the ranked relevancy of search results, and allow for e-mail and faxing of documents to customers. Intuit also wanted one product that could perform all of the above functions in order to reduce the amount of IT time and cost associated with supporting four different platforms.

Since Intuits' requirements read like a checklist of items found on the list of Hummingbird Enterprise KM attributes, it's easy to see why it emerged as "best of breed" in the search engine evaluation.

With its advanced information retrieval and indexing capabilities, Hummingbird Enterprise KM provides users with search-term highlighting and navigation to pinpoint information within a document and a statistical relevance ranking of searched documents. Hummingbird Enterprise KM also allows users to tap into multiple information sources, regardless of format, providing unified search results from a wide pool of structured and unstructured data from multiple types of applications, including CRM packages, file systems, SQL databases, and e-mail.

## Immediate Results

Once Intuit had selected Hummingbird Enterprise KM, the company didn't waste any time implementing it. Within two months of putting together its requirement definitions, Intuit had rolled out Hummingbird product to its call center representatives and integrated it with iSearch, a highly configurable, customized, Web-based Hummingbird Enterprise KM application framework that offers stateless operation and advanced query parsing for multiple repositories.

Adair describes the rollout as "fairly straightforward," consisting mainly of Intuit creating an index for its iSearch pages, putting those indexes on a 'live' Web server, and pushing the URLs for those pages to the various support staff desktops. In less than 60 days, Intuit's customer call support group in Arizona was up and running, with additional roll-outs following shortly thereafter.

"We were on a fairly tight schedule, and by working with Hummingbird, we met all of our deadlines," says Adair.

Once Hummingbird Enterprise KM was running, Intuit started an internal audit of system uptime and the number of successful searches, to see if the new solution was producing tangible results. According to Adair, the Hummingbird Enterprise KM implementation is "a consistent performer" with uptime service levels of 99 percent. In addition, one of the key support representative groups reports a 100 percent increase in the number of successful searches.

"From a functional perspective, improvements have been seen in the customer experience with our technical support and also in the job satisfaction level for the support representatives using the system," says Adair. Adair also reports that Intuit was able to retire all four of its previously used search systems, in favor of "a single reliable and easy to maintain product" — Hummingbird Enterprise KM.

The speed and flexibility of the Hummingbird Enterprise KM implementation produces measurable gains for Intuit management and staff, Adair pointed out. "The speed and precision of searches is outstanding and the ability to hone searches is easily provided — performing a 'search within a search' is a great tool," she adds. "This functionality allows the support representatives to quickly drill down on the result sets to obtain the exact information they need."

## Looking Forward

Looking to the future, Adair said that Intuit wants to make greater use of the Hummingbird Enterprise KM capabilities in order to reference documents in multiple locations.

"Hummingbird is very helpful in this arena," Adair said. "They keep in touch with us, not just in regards to the current functionality, but in helping us look to the future," Adair said. Hummingbird Enterprise KM fulfilled all the expectations Intuit had for a knowledge management solution.



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