

Case Study

**California  
consulting firm  
transforms  
information  
access with  
simplified search.**



## INDUSTRY

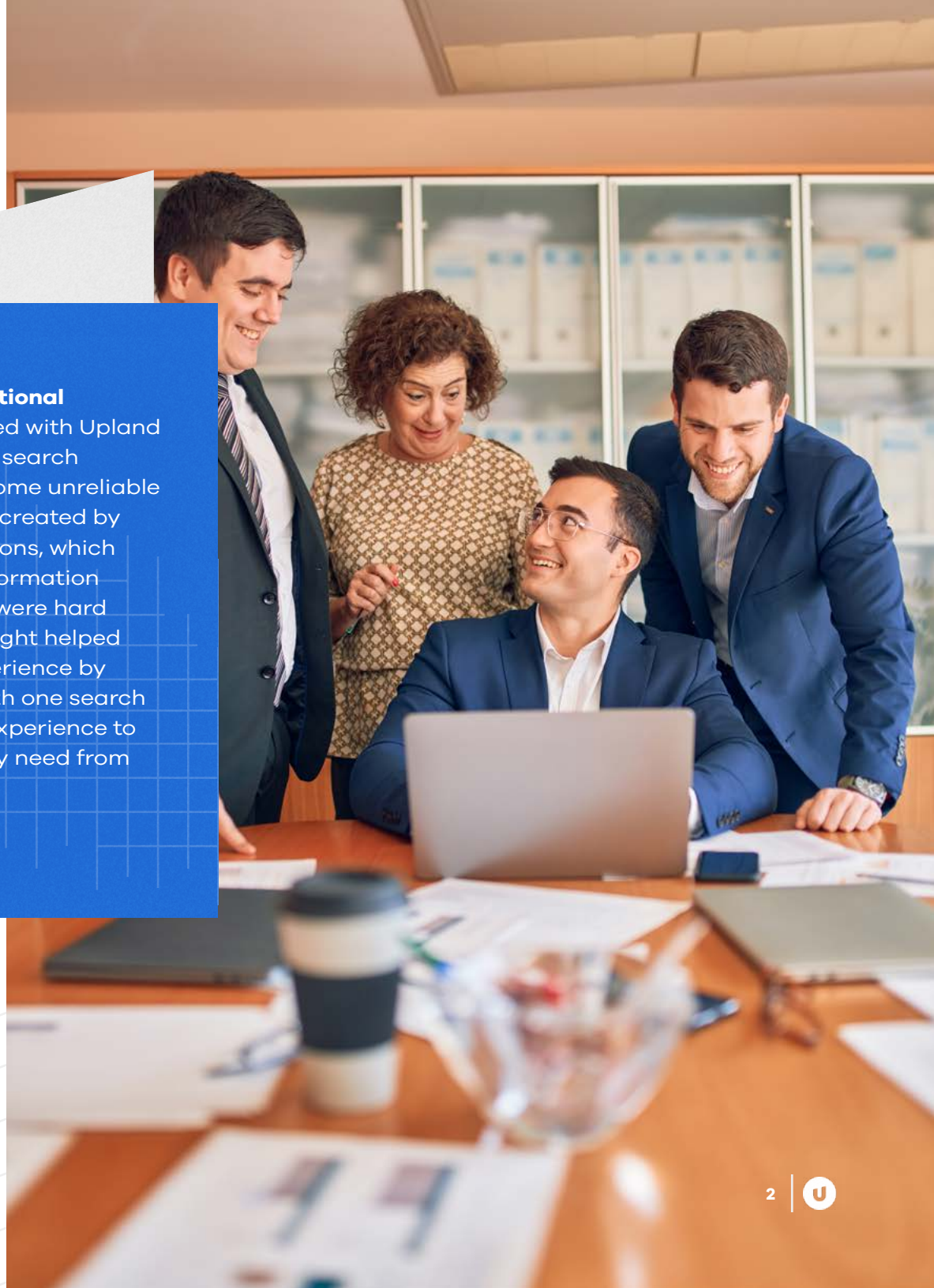
**Organizational Consulting**

## COMPANY

**California Consulting Firm**

This company uses a thoughtful, data-driven approach to support clients as they make critical choices about their people, product, and plan. With offices all across the globe, their technology identifies unprecedented opportunities and efficiencies, resulting in a holistic, achievable blueprint for success that guides businesses through each critical step in their organizational growth and evolution.

**This LA-based organizational consulting firm** partnered with Upland BA Insight to streamline search processes that had become unreliable due to information silos created by fast growth via acquisitions, which resulted in disparate information in various systems that were hard to locate. Upland BA Insight helped simplify the search experience by providing employees with one search bar and a unified user experience to find the information they need from wherever they work.





# The company integrated enterprise search with SalesForce and other existing systems.

## Rapid growth leads to fractured systems.

The business's CIO, described their challenge best when he shared the following: "When you grow this quickly through M&A, you have so many people that don't know everything the firm can offer and yet are trying to drive a relationship of some kind with a client."

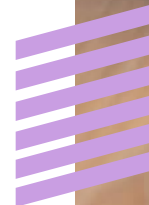
It had become difficult to ensure employees provided their clients with the best services. The rapid expansion and integration of new players and systems was only further exasperated by the fact that crucial information their employees needed to access resided in multiple enterprise systems. This left employees unsure of where to look to find the information they needed for daily work.

## BA Insight provided a "one search box" solution to combat info overload.

Putting a new enterprise search solution into place required an executive-level vision and strategy by partnering with BA Insight. The vision is described as making information easy to access and bringing it as close to each person as possible. They wanted to provide employees with the frictionless ability to find other experts within the firm and share that information with them for the purpose of collaboration.

## The solution to their painpoints included a combination of the following:

- Salesforce and SQL Connectors to integrate all corporate data into a single search index, along with all content stored within SharePoint. This directly addressed awareness around "everything the firm can offer" by enabling access to this data across all employees.



# Enterprise search engages employees and clients for impactful results.

- Salesforce In-App Search to integrate the single search application directly within Salesforce, so employees who worked every day in Salesforce could find all the necessary data without ever leaving Salesforce.
- Visual Refiners to enhance the search user experience allowed employees to quickly find the correct data or expert for their specific issue.

## Now employees can easily and quickly locate relevant results.

They rapidly executed their strategy and vision, delivering a game-changing solution to their employees. The CIO described the capabilities as follows:

"Now when our employees search for their

client, industry, or solution, they get the organizational chart showing who has helped. But they also get things like the match of an engagement in an industry with the solution and the people who were part of the engagement or the opportunity. Now, employees receive curated assets that help accelerate their pitch decks, and can even recover emails that were filed away years ago. For example, they can quickly find a document buried on their computer somewhere that they used in another pitch deck they created for another client last year that received great results."

## The future of search is powered by artificial intelligence.

The firm's executive team are not ones

to rest on their laurels. They are already researching ways to increase the competitive advantage that they have built with their search system. They are studying and implementing bots, voice integration, and a slew of AI services, and they're doing it quickly. The CIO reports these things are not that far off.

As he says, "In our world of bots, voice, and integrated technologies, that intelligent contextual search experience is already there. For us, it's more of a question of how to morph and evolve to provide search experiences to match the different ways their employees consume work and collaborate with each other. We are taking advantage of the technological advances that make it easier to accomplish that."