

Scaling Success: Proofpoint Revolutionizes Customer Support with CXone Expert

A leading cybersecurity company, Proofpoint is committed to helping organizations of all sizes protect their people from cyberattacks. With rapid growth on the horizon, the company knew it needed to scale and scale big, in order to continue serving its customers efficiently and effectively. The company began evaluating solutions to enable in-platform context support, and it decided on the NICE CXone Expert solution.



5% ↓
Decrease in ticket volume



20% INCREASE
In site engagement



IMPROVEMENT IN
SESSION/TICKET
RATIO
From 3 to 40



CUSTOMER PROFILE

ABOUT

Proofpoint, Inc. is a leading cybersecurity and compliance company that protects organizations' greatest assets and biggest risks: their people. With an integrated suite of cloud-based solutions, Proofpoint helps companies around the world stop targeted threats, safeguard their data, and make their users more resilient against cyberattacks. Leading organizations of all sizes, including 75 percent of the Fortune 100, rely on Proofpoint for people-centric security and compliance solutions that mitigate their most critical risks across email, the cloud, social media, and the web.

INDUSTRY

Cybersecurity and compliance

WEBSITE

www.proofpoint.com/us

LOCATION

Headquartered in Sunnyvale, CA

AGENTS

15 agents

GOALS

- Provide in-platform context support
- Add value to the bottom line

PRODUCTS

- [CXone Expert](#)

FEATURES

- Smart knowledge self-service
- Insight into areas of improvement to the customer journey, product, and service

01 THE BEFORE

Little-utilized knowledge assets

Proofpoint had been growing via acquisitions, including that of Essentials, which enabled it to marry the security and threat detection capabilities used by the largest organizations with the ease of use and modern SaaS architecture required to serve small and medium-sized businesses (SMBs) acquired through Proofpoint resellers and managed service providers (MSPs).

Essentials had long leveraged an on-premise customer service platform that was integrated into Proofpoint operations following the acquisition. The platform, however, offered only basic features and lacked version control and robust reporting capabilities. Few users, both internal and external, were accessing its available existing knowledge base.

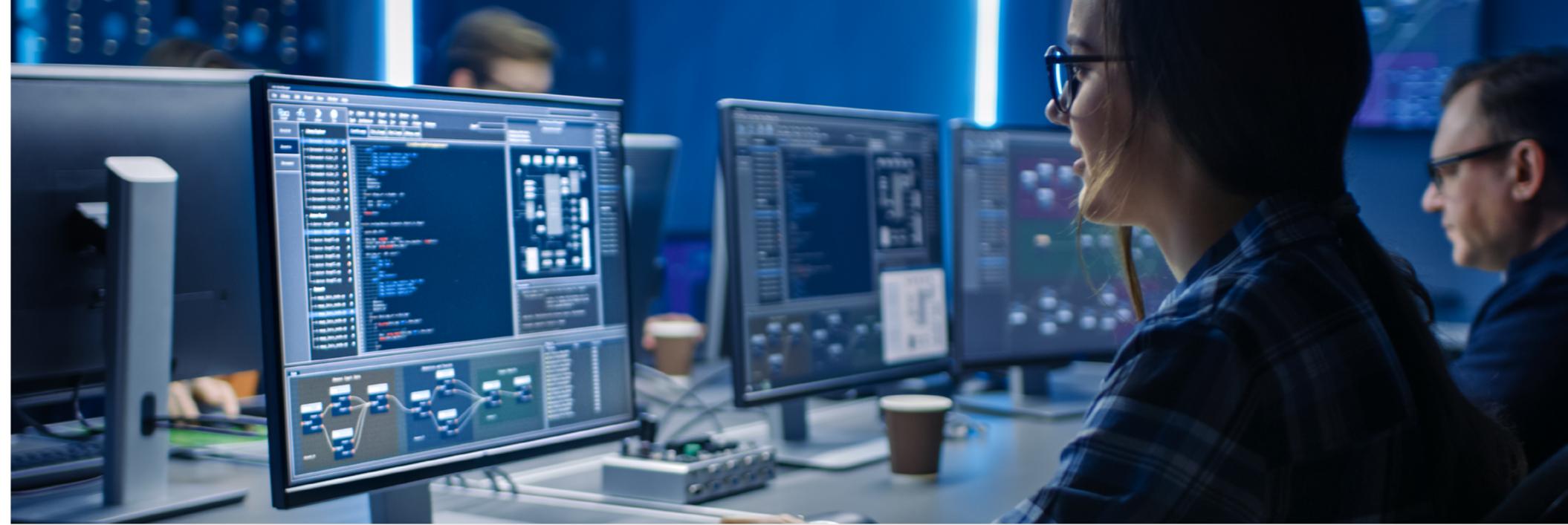
02 DESIRE TO CHANGE

A lack of public content to help SMB customers find information and resolve issues

The Proofpoint platform was undergoing a lot of change. The company was upgrading its tech stack, and Intel had selected the company as a vendor of choice for email security, prompting Proofpoint to scale in anticipation of rapid growth.

Proofpoint began evaluating solutions that would enable it to offer a public-facing knowledge base and provide in-context help to its expanding customer base. With ticket volume highly unpredictable, it was difficult to anticipate customer service needs. There was no public content available to enable customers to self-serve, causing agents to repeatedly field the same questions from different customers about how its products worked. The company also needed to empower the downstream resellers who were responsible for supporting the customers they brought to the platform. Proofpoint realized that by making the knowledge base content public, everyone would benefit.

Looking to add value to the bottom line while improving the customer experience and providing enterprise-class protection for SMBs, NICE CXone Expert offered everything Proofpoint was looking for.



03 THE SOLUTION

Meeting customers at their point of need with in-platform context support

Proofpoint started by migrating its knowledge base for SMB customers to the Expert solution to demonstrate ROI before expanding the use of Expert to other lines of business. Once the solution was deployed, Proofpoint drove user adoption by introducing public content, implementing in-context help, and providing training and support to its support engineers.

Proofpoint also took advantage of the migration process to review and update its knowledge base content. Each agent was asked to refine and migrate a handful of knowledge base articles and the functionality was so easy that most of them far exceeded the number they were asked to migrate. The Expert platform greatly reduced the effort required to add textual content and images to the knowledge base.

“It was initially an experiment,” said David Szoke, senior manager of technical support at Proofpoint. “The in-context help is what started it all off, and once we had that, we realized that we had a Porsche sitting in the driveway that we could use in other ways. It really came down to the amount of friction that it took to get knowledge—high-quality knowledge—into the platform. It was just, ‘Wow, that Porsche is super easy to drive.’”

“We didn’t have any complaints or anyone bellyaching about having to do the work,” Szoke added. “It was kind of a lifesaver at that point that we were able to get those quick, very visually appealing, easy-to-consume knowledge articles out and not drive phone calls and additional tickets into support. We’ve been able to keep headcount low and keep productivity levels high because they’re not getting the same issue over and over again.”

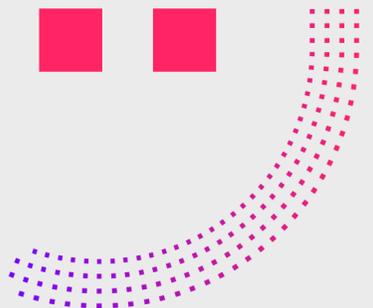
04 THE RESULTS

Reducing friction and redefining user engagement

The move to Expert greatly reduced friction in managing and updating the company’s knowledge base. Curating, auditing, and adding downloadable content was quick and easy. When the company updated its user interface and needed to update the knowledge base, replacing images was a simple process, with the ability to add tags to articles greatly improving the overall searchability.

The company also leveraged Expert’s artificial intelligence and machine learning capabilities to identify areas to automate processes, reduce technology infrastructure costs, and improve employee productivity. With real-time data and analytics, the solution enabled Proofpoint to start making data-driven decisions and improve compliance.

Perhaps one of the biggest successes, Szoke said, was that the company began to look at user engagement



differently. The solution enabled the company to move away from measuring success in user clicks to more sophisticated analysis that included how much time users were spending on an article and how far they scrolled down a page. Those insights allowed the Proofpoint team to continue to refine its help content.

The cloud-based solution also enabled Proofpoint customers to engage with the brand across various digital touchpoints. With more customers accessing the knowledge base, it has reduced the number of support tickets for Proofpoint, enabling the company to scale without increasing the number of agents. From 2021 to 2022, ticket volume decreased by 5%, while customer volume grew by 18% and site engagement increased by 20%. The average session/ticket ratio improved from 3 to 40.

Because Proofpoint is now updating its knowledge base content regularly, Expert has also delivered an unanticipated benefit in an increase in Google search snippets—a benefit the company estimates at nearly \$10K in monthly marketing value, with no cost to the company.

“We did this all just based on the principles of knowledge-centric support and with a very, very ragtag small team,” Szoke said. “We kind of feel like the rebellion in Star Wars. With Expert, we know we can get it done with a small number of resources and have a massive impact.”

05 THE FUTURE

Transforming across the business

The successful adoption of the Expert solution for the company’s SMB customer base enabled Szoke’s team to demonstrate the efficacy of its user adoption efforts and the value and ROI of the new solution to the Proofpoint management team. As a result, the company continues to expand its use of Expert across the organization.

“Overall, our digital transformation has resulted in significant financial and organizational benefits,” Szoke said. “We’ve experienced increased revenue, reduced costs, improved customer satisfaction, and higher employee engagement. We’re thrilled with the results and will continue to prioritize digital transformation as a crucial component of our business strategy.”



“We are driving people back into our knowledge resources, and they are paying off in spades. Expert is easy to use and easy to implement. It has enabled us to keep our staff and our headcount low, so we can improve our overhead numbers, margins, and profitability while increasing the satisfaction of our partners and customers.”

DAVID SZOKE
SENIOR MANAGER OF TECHNICAL SUPPORT
PROOFPOINT

About NICE

With NICE (Nasdaq: NICE), it’s never been easier for organizations of all sizes around the globe to create extraordinary customer experiences while meeting key business metrics. Featuring the world’s #1 cloud native customer experience platform, CXone, NICE is a worldwide leader in AI-powered self-service and agent-assisted CX software for the contact center—and beyond. Over 25,000 organizations in more than 150 countries, including over 85 of the Fortune 100 companies, partner with NICE to transform—and elevate—every customer interaction.

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