

Case Study



Designing a Multiproduct Customer Experience at Palo Alto Networks

“Our customers tend to like to fix things themselves. We wanted to make sure that our customers could find what they’re looking for most effectively.”

– Jeff Humby, Digital Experience Program Manager



Palo Alto Networks

Global cybersecurity leader Palo Alto Networks is changing how people and organizations interact digitally by bringing security into the cloud.

Solutions

[Website](#), [Service](#), [Digital Workplace](#)

Industry

Technology

Palo Alto Networks helps global organizations prevent cyberattacks, protecting our digital way of life. The company addresses the world’s most pressing security challenges for over 75,000 customers in over 150 countries, including 95 of the Fortune 100.

New products, new platforms

Palo Alto Networks’ roots focused on selling firewall hardware for enterprise data centers, but the rapid rise of cloud and then edge computing opened the door to change.

In response to market demands and emerging cybersecurity threats, the company shifted its customers to software-delivered security, transitioning from a single product company to a multiproduct platform. To expand its product portfolio within enterprise security, the company turned to acquisition, rounding out its offering with the addition of several niche companies.

While moving from on-premise to cloud, Palo Alto Networks has built out a comprehensive set of capabilities around endpoint, cloud, and security management that allow the company to deliver best-of-breed tools in 5 different security fields.

But with a shift in its business model towards subscriptions and a rapidly expanding portfolio, the team knew that the only way to scale customer service across a multiproduct offering, while maintaining quality, was to fully embrace digital channels.

Going from personal attention to personalized journeys

Palo Alto Networks primarily sells its products and services through a direct-touch approach working with partners to win and support end customers. For 5 consecutive years, Palo Alto Networks has been recognized by J.D. Power and TSIA for its leadership in assisted support.

With the preference for cloud creating a shift in consumption habits, customers were asking for simpler and speedier interactions. To meet these expectations, Palo Alto Networks wanted to bring its award-winning direct-touch experience online.

The team started by taking a problem-solving approach, trying to understand the difficulties people were encountering across existing touchpoints. To create a truly seamless customer journey, Palo Alto Networks needed to connect customer data across various systems and existing applications, which they did with Coveo.

“Coveo plays a big part in helping us understand what is going on through our clickstream, in conjunction with web analytics, support tickets, and product usage data.”

– Jeff Humby

The goal was for customer journeys to end in successful outcomes. Understanding where customers are and which products they’re using is crucial to connecting customers to the answers they need in a self-service way.

For power users, Palo Alto Networks also created a [Chrome Extension](#). Since 80% of all traffic comes from consumer search, the team made it easier to get answers from all digital channels, including TechDocs, LIVEcommunity, Knowledge Base, and paloaltonetworks.com, on a Google results page.

The key to Palo Alto Networks’ connected experience is data and machine learning. Based on an understanding of the user and a grasp of the knowledge that exists, they’ve leveraged Coveo machine learning to do the work for them, surfacing the best information and the most compelling answers at every touchpoint from website to community to support portal.

The right stuff at the right time

Today, customers interact with Palo Alto Networks across multiple systems to learn about and manage their products; optimize policies, procedures, and configurations; and submit support tickets. Internally, teams use tooling to handle support cases and manage their success.

“There were a lot of pieces all over the place that needed to be glued together so that the customer understood what was available to them.”

– Jeff Humby

Through the implementation of a single search platform across its commercial operations, Palo Alto Networks has optimized its infrastructure and created a more integrated experience for customers. From any entry point, customers can access the information they need to keep using Palo Alto Networks’ products successfully.

The impacts have been widespread. Palo Alto Networks estimates saving \$200 million in less than 2 years with the assistance of Coveo, including \$60 million in direct case deflection. And through the implementation of speed bumps during the case creation journey, they continue to see 10-12% improvement in case deflection year-over-year.

The company’s record of service innovation has now cascaded into digital, with Palo Alto Networks winning the TSIA 2019 STAR Award for Innovation in Customer Portals. Their use of machine learning is driving superior customer experience, value, and success.

Palo Alto Networks aims to be the partner of choice in protecting your digital way of life. More and more, digital is also the way you engage with their brand.