



## CASE STUDY

# A ServiceNow + BeyondTrust Integration That Improves Support and Productivity for Everyone

by John Quinmore | Sr Knowledge, Reporting & Tools Engineer

### **PAYCHEX**

**Products:** Remote Support & ServiceNow Integration

**Company:** Paychex

Paychex, Inc. is a leading provider of human capital management solutions, offering payroll, HR, benefits, and insurance services to over 745,000 clients in the U.S. and Europe. With innovative technology and expert support, Paychex helps businesses manage their workforce and stay compliant.

In a contact center, every second matters. Because of that, it's essential to integrate tools within the agent workflow, saving time and frustration for everyone.

At [Paychex](#), streamlining the agent workflow is something we've worked on for over a decade, and now we're seeing the rewards.

### **Putting Knowledge in Employees' Hands**

I was the first person at Paychex dedicated to our knowledge base, and seeing the project take shape was exciting. What started as an IT tool for our Enterprise Support teams expanded to our client-facing product support teams. My role today is Senior Knowledge Reporting and Tools Engineer, part of the Enterprise Support team. My primary focus is our knowledge base and its integrations, and I get to explore the capabilities of these tools while engaging with teams across Paychex. I love it.



"Giving employees a knowledge base to self-serve information can save companies millions of dollars over time."

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Paychex values knowledge and encourages self-service as much as possible, and our knowledge base has more than 62,000 articles. Paychex employees use it as a reference to answer client questions, and to find answers to their questions, whether about their PC or 401(k). Everyone is responsible for this knowledge and has the ability to create or edit articles—or flag them for the author to correct. Enabling everyone to be a part of our knowledge program allows us to set the expectation that employees consult the knowledge base first before they reach out to the Enterprise Support team. Giving employees the knowledge base to self-serve in this way has saved Paychex millions of dollars over time.

As the program evolved, we saw that moving between applications to access the information in the knowledge base slowed agent productivity. Agents working with customers don't want to click out of one tool to search within the knowledge base and then click back into another tool to close the ticket. Paychex's support organization uses several of these tools, including Salesforce, and my team uses [ServiceNow](#) to support our internal customers. We began integrating these tools with the knowledge base to keep all tools within the agent workflow.

The ServiceNow + BeyondTrust integration was my first major project at Paychex to improve the employee and agent experience, but it would not be my last.

### Continually Working to Improve Agent Workflow

Having solved this initial workflow problem, we encountered a new set of challenges. Agents could now answer employee questions by accessing the knowledge base without ever leaving ServiceNow, but they couldn't see which articles the employee referenced before contacting support. This gap caused a lot of frustration and repetitive work for agents and customers alike, with the agent running through the same set of questions the employee had already addressed. And, separately, while we made progress in streamlining the agent workflow through the ServiceNow integration, typing questions into the knowledge base was still a manual process for the agent.

Meanwhile, we decided to adopt [BeyondTrust](#) to streamline support. The 100 agents on the PC Support team are the primary users of [BeyondTrust Remote Support](#) (a different team uses BeyondTrust's [Endpoint Privilege Management](#) solution). These 100 agents support the rest of the 16,000 Paychex employees. When someone has a PC support issue or product question, agents use Remote Support to chat with the person and securely access their device to get to the heart of the issue.

To better streamline agent workflows and improve our customer experience, we needed our knowledge base to work seamlessly with our service management and secure remote access solutions. BeyondTrust's team of developers made this possible through a tailored Remote Support + ServiceNow integration that met our needs. [This integration is a key part of the Remote Support product offering](#) that resulted in an effortless flow between our knowledge base, ServiceNow, and Remote Support platforms.

BeyondTrust's product support teams are knowledgeable and responsive, and their training and documentation are excellent. As someone who has built a knowledge program, I appreciate that! That documentation also allows me to practice what I preach in terms of self-serve; since as an admin, I can troubleshoot issues or configure features without needing to consult support.

### One Integration, Many Impacts

Now, with a click of a button in the Remote Support agent console, agents can automatically open and populate most of an incident in ServiceNow. It's a simple integration, but a tremendous time saver. An agent doesn't have to manually move from one solution to another to create a ticket anymore—which removes unnecessary friction. And they also don't have to type in the customer's details, because all user information automatically populates. Manually populating those fields (name, department, contact details, metadata, etc.) might only take 15–20 seconds per chat, but multiplied by 50 chats a day, that time matters. One agent can save more than an hour each week; at our scale, that's 100 hours across our support team. In our world, even two or three minutes saves a lot of money, so this is a big win.

“With the BeyondTrust + ServiceNow integration, one agent can save more than an hour each week; at our scale, that's 100 hours across our support team. In our world, even two or three minutes saves a lot of money, so this is a big win.”

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Auto-populating the ServiceNow ticket also improves accuracy. Human error can creep in at any point during a manual process. Automating through our [ServiceNow integration](#) reduces the risk of error.

Another benefit has been the improved automation and workflow of information between our knowledge base and Remote Support. Now, when a Paychex employee searches for answers in our knowledge base, they can open a chat through BeyondTrust Remote Support within the article. In addition to auto-populating the employee's user info, BeyondTrust includes their viewing history of all the articles they referenced in trying to answer that question—solving our earlier pain point.

Attaching these articles to the ServiceNow ticket via Remote Support saves even more time, and because the agent doesn't have to rehash that information, it removes the previous frustration from the experience, **further improving customer satisfaction**. Attaching articles to tickets has been helpful as we continue to improve the knowledge base, too. We can determine whether important information is missing from an article or that we need to make a related article on that topic more prominent. Agents can also proactively attach articles, which helps other agents later search for incidents related to the one they're resolving.

Anticipating problems is a big part of our role in Enterprise Support, and we now have valuable data to understand issue trends. If multiple users suddenly reach out to support after reading the same article about a particular product feature, we know we likely have a bigger problem on our hands. We can get a team on that right away.

### A Win-Win Partnership

True partnership is about more than good products. We only work with vendors who want to work with us. If a vendor isn't willing to collaborate with us on the customizations and support we need, we won't partner with them.

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BeyondTrust understands this. They understood that the ServiceNow integration was something Paychex required to optimize our business processes. Today, BeyondTrust offers multiple [ServiceNow integrations](#) across their entire product portfolio, enabling improved security and efficiency for customers like Paychex.

Our tools have become so well integrated that it's difficult to talk about them in isolation. We started with a goal to save agents as much time as possible and to improve the customer support experience of Paychex employees. Survey scores have increased dramatically since we implemented BeyondTrust Remote Support—and the integrations have surely played a big part. BeyondTrust Remote Support has helped us optimize that experience within our knowledge base, eliminating frustration and repetitive work, improving overall time to resolution, and ultimately taking customer satisfaction to new heights at Paychex.

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BeyondTrust is the global cybersecurity leader protecting all paths to privilege with an identity-centric approach. We are leading the charge in transforming identity security and are trusted by 20,000 customers, including 75 of the Fortune 100, and our global ecosystem of partners. [Learn more at www.beyondtrust.com](http://www.beyondtrust.com).