

upland

RightAnswers

Case Study

**Paychex drives
scalable AI
knowledge
evolution with
RightAnswers.**



PAYCHEX



INDUSTRY

HR & Payroll Services

COMPANY

Paychex, Inc.
Rochester, NY

paychex.com

Paychex is one of the nation's most trusted providers of HR, payroll, and retirement and insurance services, supporting more than 590,000 clients, and more than 11 million client employees across the US.

With seventy-two products serving diverse client needs, Paychex's reputation is built on consistency, accuracy, and a laser-focus on customer experience.

PAYCHEX

Paychex, Inc. started its journey with RightAnswers in 2007. Since then, this HR and Payroll powerhouse has relied on RightAnswers as its AI Knowledge partner. Paychex leads with a culture that values knowledge, innovation, and human expertise - proving that the most successful AI strategies are built on strong knowledge foundations.



Paychex & RightAnswers have a history

Setting the stage: How it all started

Before launching its knowledge management initiative, Paychex faced a familiar challenge: knowledge was scattered across multiple systems and teams. Information lived in shared drives, ITSM tools, local databases and tribal knowledge.

As the business grew, inconsistencies in service desk responses and increasing contact volumes created friction and frustration. Meanwhile, new products were set to launch to the general client base, meaning there'd be even greater demand for support coming down the pipeline.

Paychex leadership recognized that to maintain a high quality of service, it needed a structured and sustainable way to capture, organize and share enterprise knowledge.

This marked the turning point of Paychex's journey toward a unified knowledge ecosystem.

Early stages: Partnering with RightAnswers

In 2007, the team at Paychex made two pivotal decisions:

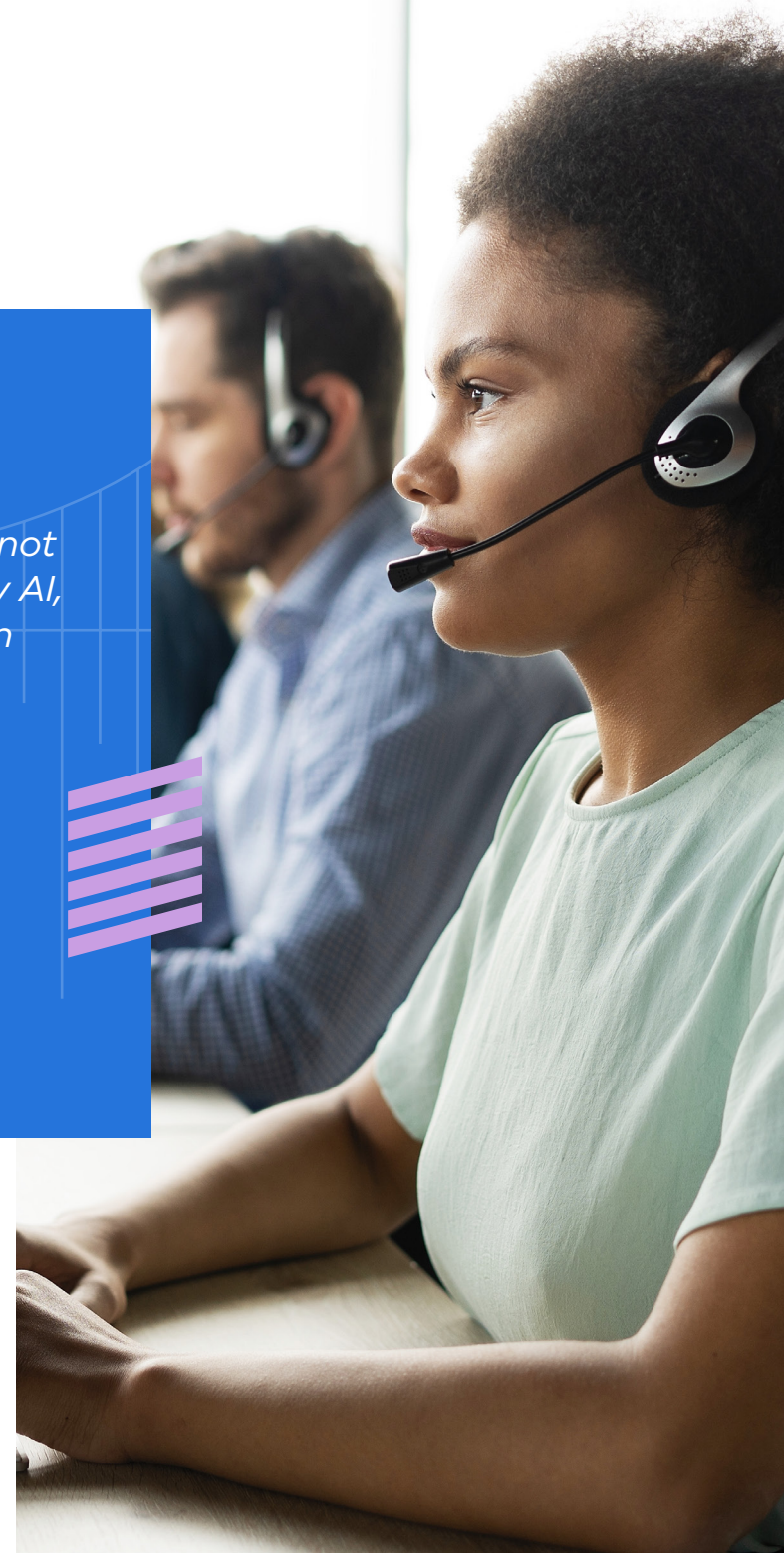
1. Implement RightAnswers as its own centralized knowledge management platform
2. Adopt the Knowledge-Centered Service (KCS) methodology to embed knowledge creation and sharing into daily workflows

The organization launched a formal KCS kickoff, introducing "knowledge as a product" and designating process roles including KCS coaches, knowledge managers, and process owners.

The early rollout focused on the service desk, then expanded enterprise-wide through an internal self-service portal know as Ask IT. As other business units observed measurable results, like faster resolutions, more consistent responses, and improved employee confidence, they began adopting the model.

"Knowledge management is absolutely fundamental. It's not being replaced by AI, it's the foundation that makes AI successful."

– Christina Seary
IT Knowledge Reporting
& Tools Manager
Paychex





"We wanted to move fast, but our engineers didn't have AI experience... we quickly saw the limits and pivoted to leverage trusted partners."

Christa Seary

IT Knowledge Reporting & Tools Manager
Paychex

Building a Knowledge foundation that lasts

As Paychex scaled its KCS program, the organization added governance layers to maintain quality and consistency across divisions. Each department's RightAnswers portal served its own audience while aligning under a standardized taxonomy—a crucial step for enterprise-wide cohesion.

To reduce duplication and improve search accuracy, Paychex launched a massive knowledge cleanup effort, refining more than 64,000 articles down to 50,000 validated and trusted resources.

"It was a painful exercise, but it raised confidence for both management and end users in the content," said Christa Seary, IT Knowledge Reporting & Tools Manager at Paychex.

The results were well worth it: a unified, credible and trusted knowledge management base that could scale with the business—and eventually, power new AI capabilities.

Leading the next era of intelligent support

As AI began reshaping how organizations deliver customer and employee support, Paychex recognized both the opportunity and the responsibility to adapt. The company's long-standing KCS and RightAnswers foundation gave it a significant advantage, but Paychex also understood that AI is only as powerful as the knowledge behind it.

In 2023, Paychex launched a homegrown generative AI initiative to explore how AI could improve service efficiency. While the internal team achieved promising results, early challenges quickly surfaced: engineers had limited AI experience, and progress slowed under the complexity of large-scale implementation.

Rather than continuing alone, Paychex partnered with Upland RightAnswers to accelerate its AI journey. RightAnswers' structured knowledge base, governance tools, and AI-ready architecture provided the ideal environment for safe, scalable experimentation.

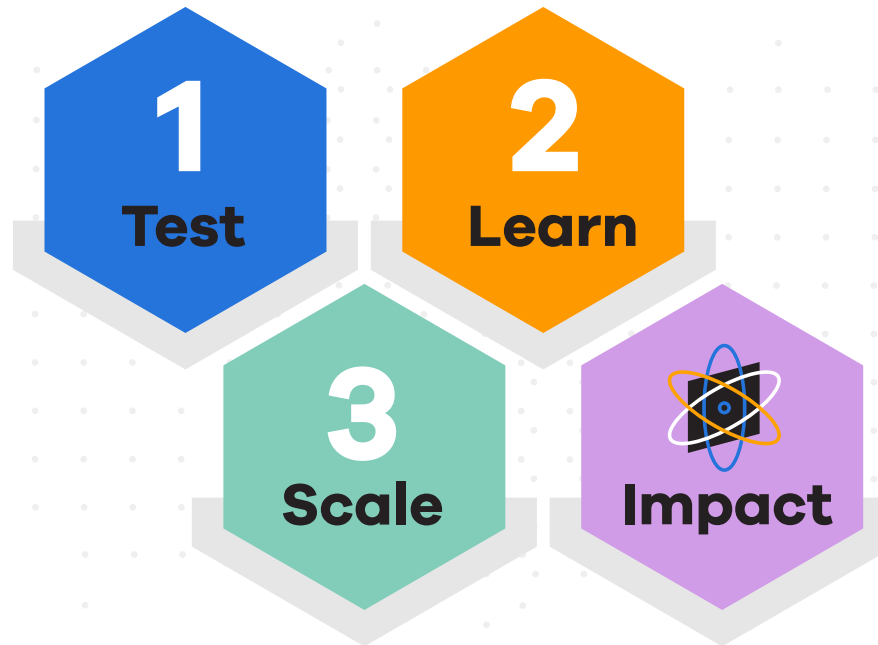


From proof of concept to scalable impact

Instead of launching an all-encompassing rollout, Paychex focused on targeted proof-of-concept (POC) initiatives using RightAnswers' AI tools, including Gen Answers and Knowledge Assist.

Early POCs revealed that user diversity drives accuracy: when client-facing teams joined the testing group, results improved dramatically.

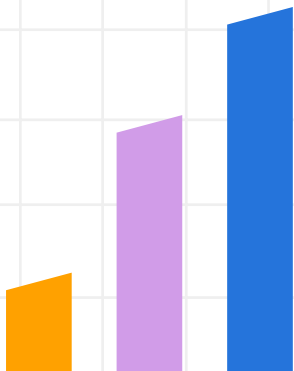
This collaborative, iterative approach allowed Paychex to build confidence internally, validate AI performance, and refine content before expanding across the enterprise.



“Accuracy improved as soon as we brought in frontline users. They ask different, more practical questions than IT.”

Christa Seary

IT Knowledge Reporting & Tools Manager
Paychex



AI as a catalyst for better knowledge

AI quickly became more than a way to deliver answers - it evolved into a tool for enhancing the knowledge base itself. With RightAnswers' Knowledge Gap Analysis and AI-powered authoring, Paychex identified missing steps in documentation, improved metadata, and standardized article formats.

Authors could now input incident notes and have AI generate draft articles, which subject matter experts refined before publication. The result was faster authoring cycles and broader participation across departments.

The new workflow also empowered global and non-native English-speaking teams, making knowledge creation more inclusive than ever.

"AI-powered authoring builds confidence because now more experts can participate."

Christa Seary
IT Knowledge Reporting & Tools Manager
Paychex



Redefining success in the AI era

Through its partnership with RightAnswers, Paychex redefined what success with AI looks like. Instead of chasing perfection, the focus shifted to adoption, engagement, and measurable business impact.

With RightAnswers as its AI partner, Paychex continues to lead with a culture that values knowledge, innovation, and human expertise—proving that the most successful AI strategies are built on strong knowledge foundations.

Key outcomes include:

- **Faster, more accurate resolutions** across service channels
- **Greater SME participation** in content creation
- **Higher confidence and inclusivity** among global teams
- **Reduced contact volumes** through improved self-service
- Knowledge Articles to Start: **64,000+**
- Knowledge Articles at End: **50,000**

“AI hasn’t replaced knowledge management. It’s made it more important than ever.”

Christa Seary

IT Knowledge Reporting & Tools Manager
Paychex

Knowledge with Trust, AI with Purpose.

Upland RightAnswers is the AI-powered, leading KCS v6 verified solution for configurable, scalable knowledge creation and delivery. Tailored for complex enterprises, RightAnswers allows customer service teams to quickly troubleshoot issues and satisfy customers.

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For more information visit: uplandsoftware.com/rightanswers