upland RightAnswers

Case Study

Protective Life transforms enterprise knowledge with RightAnswers.

Protective

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Protective Life partnered with RightAnswers to transform its knowledge management practices. By modernizing its knowledge ecosystem with structured taxonomy, role-based content, and a sleek branded interface, Protective now operates with a scalable, self-sustaining system that drives faster resolutions, reduces friction, and supports confident decision-making across the enterprise.
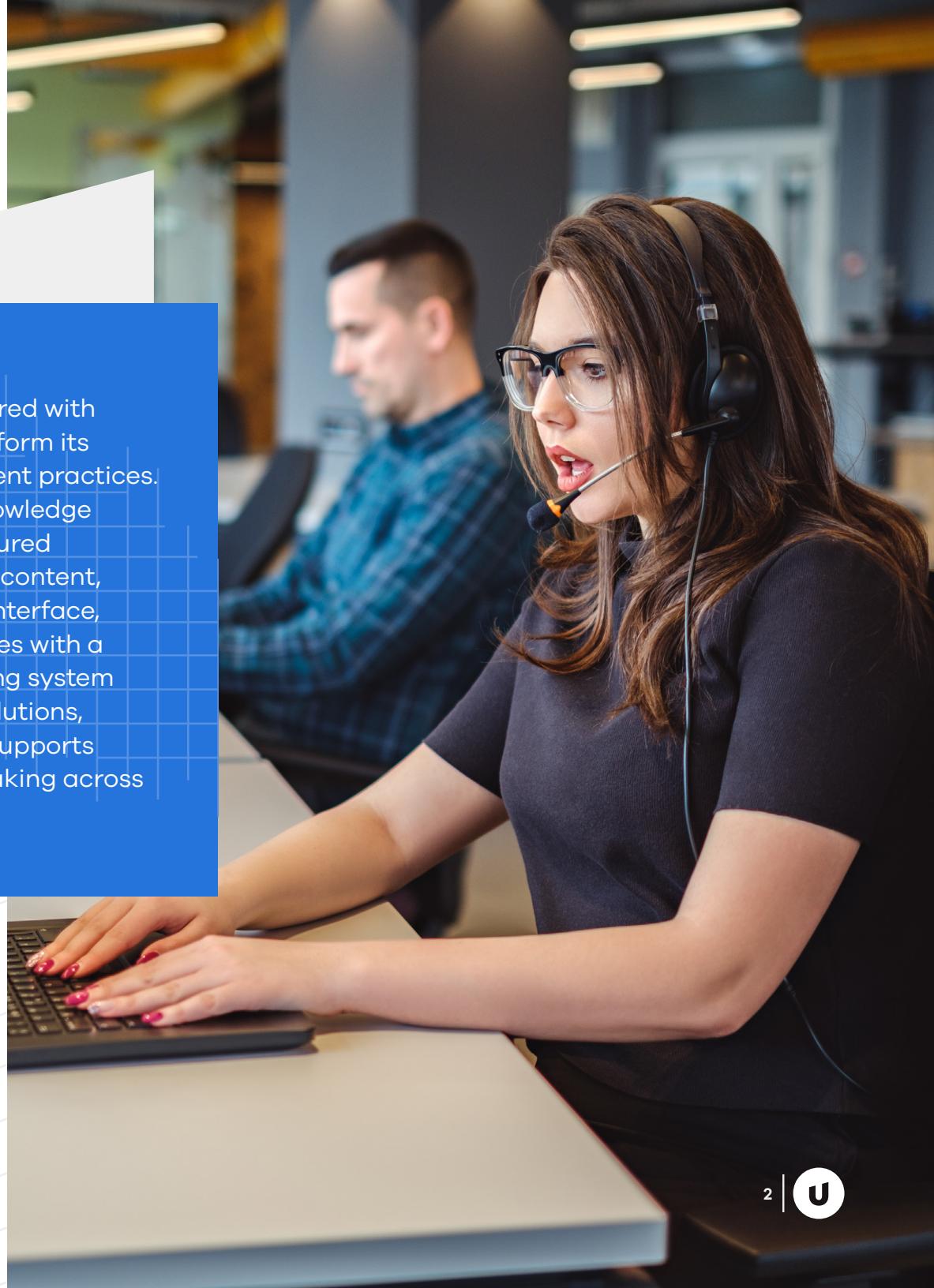
The Challenge: A knowledge system with untapped potential

Although Protective had used RightAnswers for years, their frontline agents were beginning to feel some friction. The platform itself was capable, but the governance, structure, and design within their knowledge base had not kept pace with their rapid organizational growth. This disconnect led to significant operational hurdles.

Key friction points impacting agent confidence and efficiency

- **Unstructured search experience:** Agents were frustrated by an unstructured search experience that delivered overloaded and irrelevant results, frequently causing them to abandon searches.

- **Inconsistent taxonomy:** Content lacked departmental clarity, ownership markers, consistent naming conventions, and purpose-driven categorization, making it difficult to find reliable information quickly.

- **Low authoring confidence:** Nearly 90% of contributors were unsure how to create, store, or maintain content according to company best practices.

- **Legacy, unbranded interface:** The user interface had not been updated since its initial deployment and no longer aligned with Protective's brand or growing user expectations, eroding trust in the system.

Protective didn't need a new tool. It needed a knowledge ecosystem reset.

Protective's challenge wasn't technology, it was structure. While RightAnswers was already in place, the knowledge ecosystem surrounding it had not evolved to match the organization's scale, complexity, or governance needs.

The Solution: A holistic knowledge transformation led by RightAnswers Knowledge Services
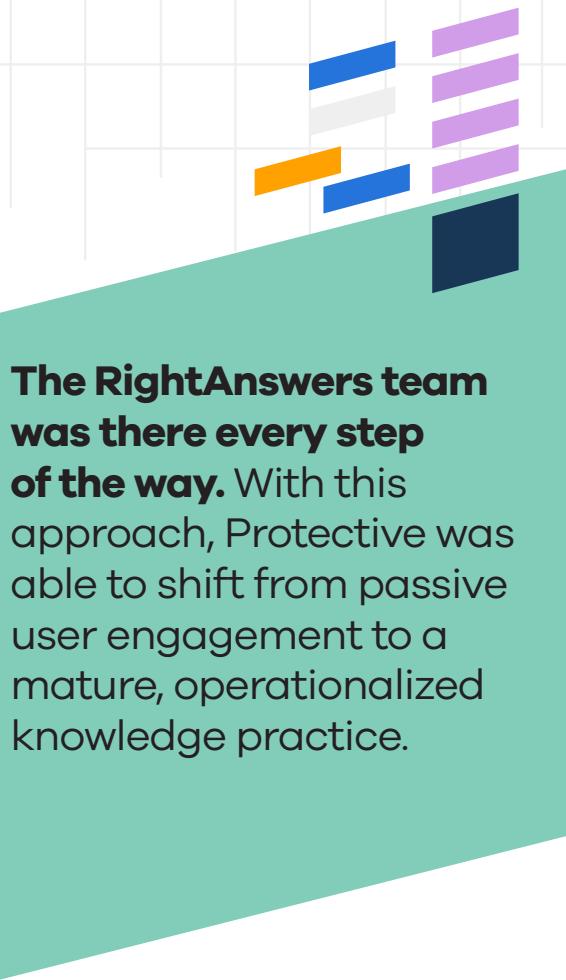
The RightAnswers team was there every step of the way. With this approach, Protective was able to shift from passive user engagement to a mature, operationalized knowledge practice.

Protective partnered with Upland to revitalize its knowledge management best practices. The engagement began with a health check led by the RightAnswers Professional Services team. What began as a content and performance review evolved into a full knowledge ecosystem transformation specifically designed to address the root cause of their challenges.

This holistic approach delivered:

- **Live usage analysis:** The team captured real-time friction points within the search, navigation, and authoring workflows to identify precise areas for improvement.

- **Taxonomy and indexing overhaul:** A structured taxonomy was implemented, eliminating content noise and improving scan-based findability.

- **Role-based content segmentation:** Content was segmented by role and tested using controlled pilot groups to ensure users only saw information relevant to their needs.

- **Enterprise-wide renaming standards:** New naming conventions were established and adopted as the official standard across Protective, providing consistency across the knowledge base.

- **A sleek branded UI:** A modernized user interface was deployed to align with Protective's brand, helping to rebuild user trust and drive adoption.

- **Comprehensive enablement:** Training was rolled out by role for authors, administrators, trainers, and producers, enabling teams to gain a full understanding of capabilities and ensuring the organization can sustain new processes as the company continues to grow.
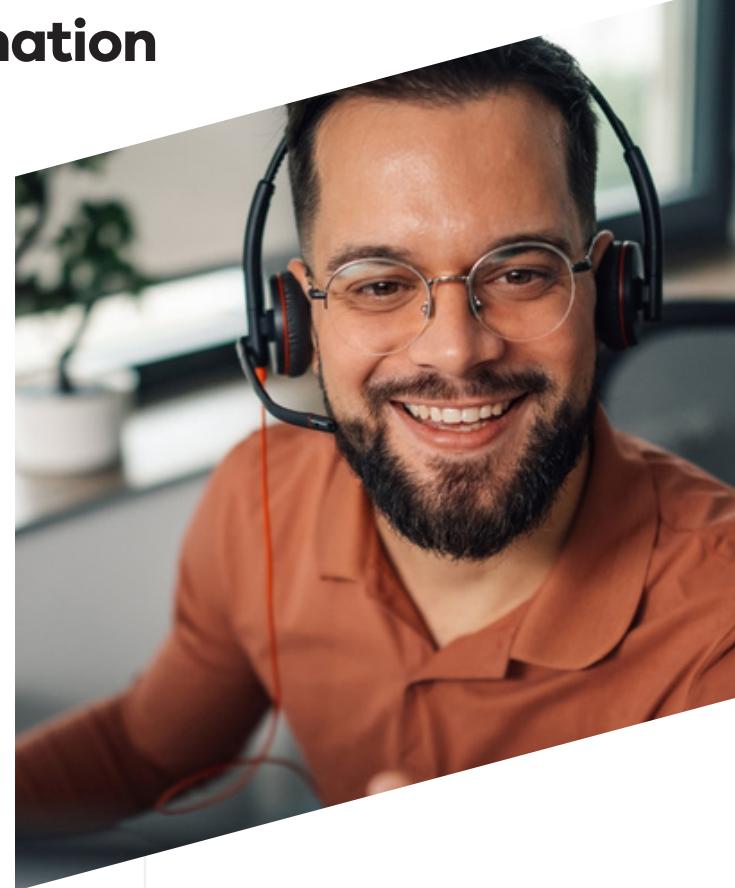
The Results: A scalable knowledge ecosystem for the enterprise

Enterprise-wide impact

The partnership produced a powerful, self-sustaining knowledge ecosystem that delivered measurable impact across the business. RightAnswers evolved from a departmental call-center tool into Protective's knowledge backbone, now supporting:

- 1,500 internal users

- 380+ active contributors across departments

Behavioral & structural change

- Governance structures created during the engagement remain intact, consistent, repeatable, and deeply embedded in daily operations.

- Departmental prefixing and taxonomy are now mandatory standards for all new business lines onboarding the RightAnswers platform.

- The adoption protocol developed with Upland Knowledge Services is now used for future onboarding, without external support.

Sustained independence

Protective has moved beyond relying on ad-hoc interventions. The organization now operates with:

- High authoring confidence and clear workflows

- Stable and repeatable governance processes

- Increased renewal continuity driven by proven value

Strategic expansion

The improved search, structured content, and modernized experience have enabled new departments to join RightAnswers with significantly reduced friction and training lift, further accelerating enterprise-wide adoption into the future.
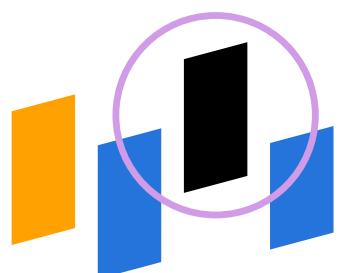
The power of a knowledge-first partnership

Why the partnership works

Protective's successful transformation was made possible through its collaboration with Upland Knowledge Services. Upland provided the strategic guidance and hands-on expertise needed to turn a powerful tool into a high-performing knowledge ecosystem. For Protective, this engagement included:

- Dedicated Customer Success Management
- KCS™ training and certification best practices
- Regular reviews and optimization initiatives
- Expert guidance to align content, governance, and user experience with enterprise goals

A smarter path forward

By modernizing knowledge with RightAnswers and Knowledge Services, Protective Life now operates with a strong, scalable, and self-sustaining knowledge ecosystem that supports faster resolutions, reduced friction, and more confident decision-making across the enterprise.

Protective's journey demonstrates what happens when an organization moves from deploying a tool to truly orchestrating a knowledge ecosystem—one that learns, adapts, and drives measurable business performance.

Ready to transform your knowledge operations into a strategic advantage?

Our Knowledge Services team delivers structured assessments, KCS consulting, training, coaching, and technical services to optimize how your organization uses knowledge to perform, serve, and scale.

Success came from more than a platform. Strategic guidance, hands-on expertise, and ongoing optimization helped turn knowledge into a sustainable, enterprise-wide capability.

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.