

“In terms of the experience for employees, there’s nothing even close to Moveworks. It’s the best, period.”

— **Steve Januario**, VP of Digital Employee Experience, Palo Alto Networks

# How AI helps Palo Alto Networks stay productive from anywhere

 **paloalto**<sup>®</sup> NETWORKS → **Case Study**

Hours of employee productivity  
saved by Moveworks, and counting

**351K**

## The global standard for security

Palo Alto Networks is the global leader in cybersecurity. Headquartered in Santa Clara, California, it develops next-generation firewalls, cloud-native security tools, and other solutions designed to thwart sophisticated cyber-attacks. These products protect more than 85,000 enterprise customers in over 150 countries, including most of the Fortune 100. From November 2020 to November 2021, the company's market capitalization doubled to reach \$50 billion.

This rapid growth has allowed Palo Alto Networks to hire employees around the world. But with a workforce of almost 15,000 people, its help desk had to deliver support on a much larger scale—without dramatically increasing its headcount. That meant finding a more efficient way to address IT issues, HR requests, and policy questions, instead of doing everything by hand. And in the context of the pandemic, what Palo Alto Networks really needed was a new approach to supporting productivity from anywhere.

## FLEXWORK is the future

That approach is called FLEXWORK: a bold vision for the future of work in the tech industry based on flexibility and choice. Pioneered by five forward-thinking companies, Palo Alto Networks, Box, Splunk, Uber, and Zoom, FLEXWORK gives employees the power to determine how they collaborate, given their unique circumstances. For Nicole Tate-Pappas, Senior Director of Digital Experience Management at Palo Alto Networks, it's about letting people "make decisions that are the best for their life and career."

"FLEXWORK recognizes that everyone is different and has different needs—especially now," she said. "We're on a journey to personalize benefits, schedules, and support to give our people flexibility, whether that's coming into the office or working from home."

But it takes more than just policy changes to make FLEXWORK possible. Tate-Pappas noted that, before the pandemic, Palo Alto Networks had limited support options, and she knew that "technology would play a critical role in meeting people where they are." With that goal in mind, the company went looking for a solution to help employees stay productive, connected, and informed, no matter how or where they choose to work.

## Challenges

- Providing immediate, 24/7 support to a hybrid workforce
- Allowing the help desk to scale its operations while remaining efficient

## Results

- Able to instantly resolve employee's support issues—anytime and anywhere
- Supported rapid company growth, without increasing the size of the help desk

## Key Integrations



Slack  
Chat



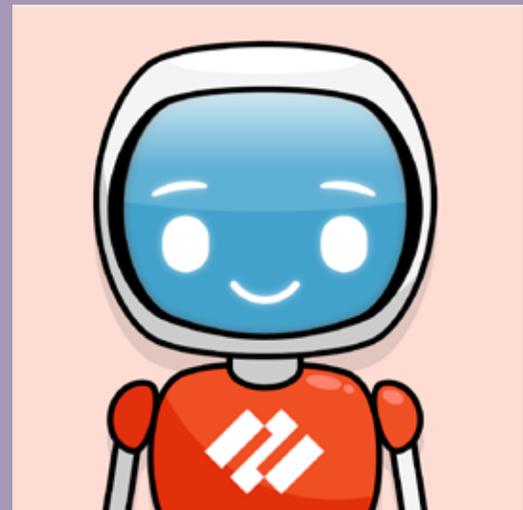
ServiceNow  
ITSM



MFA

## Moveworks Bot

Sheldon



## Sheldon delivers support in seconds

In April 2020, Palo Alto Networks deployed its Moveworks bot, better known to the team as Sheldon. Powered by advanced artificial intelligence (AI), Sheldon helps employees through natural conversations, whether they need access to software, got locked out of their account, or have a question about the new FLEXWORK policy. The bot understands each request and then determines the most relevant solutions at the company, all in a matter of seconds.

Simplicity is the key to enabling self-service, which is why Palo Alto Networks leverages Sheldon to deliver a simple, conversational support experience across all channels. Today, the bot intercepts employees' issues wherever they're submitted: via direct message, in the Slack channel for IT help, through email, and even inside its ServiceNow portal. No matter where they go, Sheldon empowers people to address their own issues.

"Moveworks offers the ability to go anywhere for help—email, Slack, our ServiceNow portal—and still end up in Sheldon's hands as the first line of support," said Januario. "It's letting us get the fastest response, right up front."

## Immediate impact—at a pivotal moment

Palo Alto Networks rolled out Sheldon at a pivotal moment, for both the company and the entire planet. At the start of the pandemic, employees needed to get comfortable working from home, which created a flood of IT requests, HR requests, policy questions, and more. Tate-Pappas remembered telling the team that "Moveworks needs to go live now," and she found that implementing the bot was "incredibly simple" and "happened without a lot of womanpower from us." Sheldon began solving issues on day one, which Januario attributed to Moveworks' understanding of enterprise language.

"Our deployment was extremely fast," he said. "You can get an impact from Moveworks in under a month, if your team is aligned on the goal."

However, the Palo Alto Networks team was most impressed with Moveworks' ongoing commitment to customer success, long past the day the bot went live. Moveworks takes complete ownership over its results, meeting regularly with the team to review metrics, discuss new potential use cases, and identify knowledge gaps. In fact, the IT help desk went from 10 knowledge articles to more than 250 "just like that," according to Tate-Pappas, because of the visibility and guidance that Moveworks provides.



"Moveworks' Customer Success team always leans in when I describe an opportunity. Every interaction with Moveworks makes me feel like I've planted a seed that will grow and make the platform more powerful."

— **Nicole Tate-Papas**, Senior Director of Experience Management, Palo Alto Networks

# Sheldon solves issues wherever employees go, including ServiceNow.



A fully secure, personalized experience, without a separate authentication process.



Notifications and communication follows users across platforms.



The same conversational AI interface in the enterprise portal.

Get Help

Request Something

Get Answers

EN

EN

More

Good morning.

## Welcome to Enterprise Portal

Start typing your question, or search with keyword

**Sheldon**

🕒 Time is running out! Complete Open Enrollment Now 🕒

You have less than 5 days left to enroll in (or waive) health insurance.

👉 Click [here](#) to enroll!

For IT questions, chat with me or type **help** to learn what I can do.

Oct. 12, 2021 9:17AM

Oct. 12, 2021 9:18AM

*Ok, I found a new answer that might help.*

**Steps on connecting to Global Protect (VPN) on your corporate laptop:**  
Overview: This article will share the best.

Ask for help from your bot. E.g, I need VPN support.

Feedback

## A single solution for employee support

At first, Sheldon was focused on solving IT support issues, such as creating and editing email groups, provisioning software, finding forms, troubleshooting errors, resetting passwords, unlocking accounts, and more. But other departments at Palo Alto Networks quickly recognized Sheldon's potential to eliminate their busy work. Now, the bot can handle a broad range of HR and payroll requests from employees, straight in Slack.

"Moveworks brings together all our resources and technologies into one interface, so employees don't have to go digging around," said Elizabeth Wheeler, Director of Benefits & HR Connect. "It lets different departments work in their own unique systems, while giving employees a one-stop shop for everything."

Wheeler noted that—at most companies—employees aren't sure where to go for help, since they rarely know the exact resource or expert they need. Sheldon eliminates this confusion by "providing the ability to just explain your problem" to the bot, without worrying about whether it's an IT or HR or payroll issue. The one-stop shop approach is why almost every Palo Alto Networks employee has used Sheldon to get support, adding up to thousands of issues automated per month.

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"Sheldon plays a huge role in enabling FLEXWORK. He doesn't just file tickets—he takes action and solves issues automatically, just by asking in Slack. It's an experience our people rely on."

— **Nicole Tate-Pappas**, Senior Director of Experience Management, Palo Alto Networks

## Moveworks by the Numbers



145K

Interactions with Sheldon



>90%

Of employees have used Moveworks



4K

Issues solved per month

# The promise of anytime, anywhere

FLEXWORK promises a new way of working: the flexibility to work anytime, anywhere. In practice, fulfilling that promise takes both new technology and a new vision for employee experience. It's not enough to invest in remote productivity tools; companies must ensure their people can find and use those tools, whatever their habits and preferences.

With Moveworks, Palo Alto Networks has made working anytime, anywhere a reality. The bot meets employees where they are—including in the company's Slack channel for IT help—and jumps in whenever its confident it can help. Already, Moveworks has resolved more than 1,000 issues in that channel, which is just one of the many ways it supports remote collaboration. It's a unique platform in that it drives its own adoption.

"Sheldon promotes himself," said Tate-Pappas. "Now, everybody who needs help uses the bot."

In October 2021, Palo Alto Networks launched another avenue to engage with Sheldon: the ServiceNow portal. Sheldon immediately greets employees who visit the portal and allows them to get help through natural conversation, so they don't have to go digging for the articles and forms they need. And crucially, the experience is personalized to the specific user, since Sheldon automatically syncs the user's location, permissions, and conversation history across all channels. It's brought the full power of Moveworks to wherever employees go for support.

"Sheldon lets us deliver personalized support at scale. It considers who I am, where I live, and what I do—every time it responds."

— Elizabeth Wheeler, Director of Benefits & HR Connect, Palo Alto Networks

## Product Highlight

Sheldon helps employees get IT questions answered directly in Palo Alto Network's public IT channel, posting solutions for all to see. This product highlight is a real user interaction, anonymized for privacy reasons.

The screenshot shows a Slack channel conversation. At the top, it says "Sheldon, Svetlana Weber". Svetlana Weber posts a message at 3:08 PM: "Hello IT team, i am new and received the laptop/monitor/mouse, but it seems that i should have received a keyboard and webcam (not needed it) . Please advise if i need to open a ticket for the keyboard. Thx". Below her message are reaction icons for eyes (1), a checkmark (1), and a smiley face. There are "2 replies" below. The first reply is from Sheldon (APP) 41 minutes ago: "Hey Svetlana Weber! I'm sending you a DM with related article(s). Please respond to it, so I know what to do next! Click on @Sheldon to continue." The second reply is from Sheldon (APP) 33 minutes ago: "Svetlana Weber rated my answers as helpful. Marking this as resolved." Below the replies is a link to an FAQ article: "FAQ: What accessories are available while working from home?". The article overview states: "Overview: This article will outline what accessories are available while working from home. At this time, all new U.S office based employees as of 08/31/2020 will be provided an IT Welcome Kit to help with productivity while you are working from home. These kits will be shipped to your provided shipping address during your onboarding process. Welcome... Click here to read the full article". At the bottom, there is a tip: "Try DM'ing @Sheldon for other IT issues!"

## Security that's trusted by the best

Not surprisingly, Palo Alto Networks has extremely high standards when it comes to safeguarding its own information and employees.

To meet these standards, Moveworks has engineered robust security controls and data privacy protections into every component of its platform; it is compliant with ISO 27001 as well as SOC 2 Type 1 and Type 2. Cloud security is a particular focus for Moveworks: it earned Gold certification for CSA STAR Level 2, given only to organizations with the most mature cloud security postures.



## From busy work to meaningful work

Ultimately, Moveworks makes its mark by empowering people to spend their time on meaningful work, not busy work. That's a difficult challenge in a hybrid workplace, one that requires reimagining the support process to enable flexibility and personalization. Yet Palo Alto Networks has achieved its vision for FLEXWORK by backing up the right policies with the right technologies. And for the help desk, it's freed up agents to concentrate on high-impact initiatives:

"Moveworks lets us up-level people," said Tate-Pappas. "We're not talking about resetting passwords and solving tickets anymore—we're automating things and focusing on transformation."

Wheeler, meanwhile, has witnessed Moveworks dramatically multiply the power of the HR team. The company's "hand-holding" approach couldn't scale to support a much larger workforce, she said, and the goal for all departments became to "help more employees with less resources." After saving 55,000 hours of productivity with Moveworks, and counting, it's safe to say they succeeded.

"It's really the small moments that create your company culture. With Moveworks, we've made those millions of small moments effortless—by giving our employees what they need, when they need it. The result is that my team can focus on the big projects that move our business forward."

— Elizabeth Wheeler, Director of Benefits & HR Connect, Palo Alto Networks

## Request a demo

[moveworks.com/request-demo](https://moveworks.com/request-demo)

