



🌐 United States

👤 1300+ employees

🏢 Business Consulting and Services

154%

growth in Service Management with InvGate, more than 60 help desks.

70%

net deflection rate — VSA resolved requests without a ticket.¹

84%

net deflection on Kantata and Salesforce support queries.

¹ Net deflection: conversations resolved without a ticket being created through the VSA or any other channel within 15 minutes. Gross deflection: conversations that did not create a ticket directly via the VSA) reached 86%.

Case Study

How CrossCountry Consulting is Turning InvGate Into an AI-Powered Self-Service Knowledge Hub

CrossCountry Consulting is the transformation partner for the Office of the CFO. As a trusted advisor to Fortune 500 companies, emerging growth market leaders, and private equity sponsors, the firm provides specialized solutions across finance, accounting, risk, and operations. Combining deep domain expertise with data, AI, and technology, CrossCountry helps organizations modernize workflows, drive human-centered change, and maximize transaction value.

Challenge

Before InvGate, CrossCountry managed service requests via email while knowledge lived scattered across SharePoint and intranets.

Routine questions generated unnecessary tickets, and rapid growth made the documentation problem harder to solve.

Solution

CrossCountry moved to InvGate Service Management in 2024, building a unified ESM platform across 60 help desks. As every team contributed knowledge articles, a shared organizational knowledge base took shape. When InvGate's Virtual Service Agent (VSA) arrived, that foundation became the engine of a company-wide self-service hub.

✔ **Collective knowledge foundation:**

Every team contributed articles, building 400+ across the organization as the backbone for the Virtual Service Agent, and turning daily operations documentation into a searchable, AI-ready asset.

✔ **Acquisition onboarding:**

As the firm grew through acquisitions, InvGate's portal and VSA standardized onboarding for new teams, replacing manual support with structured self-service.

✔ **ESM platform at scale:**

CrossCountry grew to 200+ agents across 60 help desks, expanding from IT into HR, Legal, Operations, and client-facing support.

✔ **Virtual Service Agent deployment:**

Deployed via Microsoft Teams and the embedded portal, the Virtual Service Agent gave employees instant, summarized answers, achieving 70% net deflection and replacing direct pings and unnecessary ticket creation.

✔ **Kantata and Salesforce queries as the top deflected area:**

Deflection is highest where knowledge is deepest. Kantata and Salesforce queries, the firm's core Project Management and CRM tools, reached 84% net deflection. Consultants asking how to submit timesheets, update forecasts, or manage change orders in Kantata got immediate answers from the VSA without opening a ticket.



“With InvGate’s Virtual Service Agent, our employees can now find the answers they need instantly. What’s most powerful is how it centralizes all our knowledge — it’s become our self-service hub, and we want every employee to see the bot as their first point of contact.”

Becca Davis
Senior Manager, Corporate Technology Solutions at CrossCountry Consulting.

What’s next

With the VSA established as the company's self-service hub across Teams and the embedded portal, CrossCountry's focus is on scaling that foundation across a growing organization.

Recent acquisitions have made the Hub the first point of contact for newly integrated teams, replacing fragmented onboarding documentation with a single AI-powered entry point employees can use from day one.

The team is expanding knowledge coverage into areas where employees still default to direct support, like HR onboarding policy, while using VSA usage data to refine which knowledge articles and catalogs the agent surfaces most.

Global leaders trust InvGate



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your IT operations**

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