Customer Central

Problem Statements & User Stories — Phase 1 MVP

Justworks GPM Interview Case Study // Darrien Watson // February 2026

About This Document

This document defines the six core problems addressed by the Customer Central Phase 1 MVP, the user stories derived from each problem, and the acceptance criteria required to validate each story. Each problem is grounded in the Justworks case study brief, with the sourcing method clearly labeled: a direct quote from the brief, or an explicit derivation note explaining how the problem was inferred.

The user stories follow a standard format: As a [user], I want [capability], so that [outcome]. Acceptance criteria are written to be ticket-ready — specific enough that an engineer can determine done without a follow-up meeting.

BLUE SOURCE BLOCK	AMBER SOURCE BLOCK
Direct quote from the case study brief	Derived from the brief — rationale provided

Stated Assumptions

The following assumptions are made in the absence of direct access to Justworks' internal systems. These should be validated during alpha or prior to finalizing engineering scope.

1. CSO agents today use Zendesk as their primary ticket/chat system and Salesforce as their primary account record system. These are treated as the two anchor integrations for Phase 1.
2. A shared unique identifier (account/company ID) exists across Zendesk, Salesforce, and the Justworks production DB, enabling record joining. If this does not exist, establishing a shared key becomes a prerequisite dependency.
3. A read-replica of the Justworks production DB is available for dashboard queries. Direct production DB queries are assumed to be prohibited for performance/safety reasons.
4. CSO agents are desktop-based during their shifts. Mobile/tablet optimization is out of scope for Phase 1.

5. PII access controls will be addressed during implementation in partnership with legal and security teams. This document assumes agents have appropriate access to the data surfaced.
1. Caller ID / CTI integration (automatic screen-pop on inbound call) is out of scope for Phase 1. Agents will search manually to pull up a customer.

Primary User

All Phase 1 user stories are written from the perspective of the front-line CSO Agent — the person picking up the phone, responding to chat, or answering email. Secondary users (team leads, CSO leadership) are out of scope for Phase 1 dashboard features but inform the data model and logging structure.

The CSO agent serves two distinct caller types, each requiring different data to be surfaced:

Caller Type	Who They Are	Primary Data Needs
Company Admin	Founder, HR manager, or ops lead managing the Justworks account	Company profile, billing status, payroll runs, employee roster, plan details, open issues
Individual Employee	An employee at a Justworks customer company calling about their own pay, benefits, or employment details	Personal details, benefits elections, pay stub summary, personal interaction history, employer's plan context

Problem Statements & User Stories

PROBLEM 1 The Context-Switching Tax

Problem Statement

CSO agents must toggle between 5–6 disconnected systems (Zendesk, Salesforce, the Justworks admin dashboard, an internal knowledge base, Slack, and Tableau) to assemble a complete picture of a customer during a live call. Every context switch costs cognitive bandwidth and clock time — resulting in dead air, missed connections between signals, and a degraded customer experience at the moment of highest stakes.

Source: Case Study Brief (Direct Quote)

"Customer Central should allow CSO to carry out routine tasks, understand complete profiles about our customer companies and the employees of those companies, and ultimately give them information necessary to provide a best-in-class customer experience for small businesses."

User Stories & Acceptance Criteria

US-1.1 *As a CSO agent receiving an inbound call, I want a single-pane view of the customer's company profile, account status, and recent interaction history — so I can orient myself within 5 seconds without switching systems.*

2. Dashboard loads a complete customer profile (company card, account status, contact history, open issues) within 3 seconds of company selection.
3. Agent is never required to open Zendesk, Salesforce, or the Justworks admin dashboard separately to complete a routine interaction.
4. All data panes are visible on a single screen without horizontal scrolling on a standard 1920x1080 monitor.
5. If any data source is unavailable, the affected pane displays a graceful degradation message with a timestamp indicating last successful sync — the rest of the dashboard remains functional.

US-1.2 *As a CSO agent, I want all data on the dashboard to load within 3 seconds of selecting a company — so I can be ready before the caller finishes explaining their name.*

6. Dashboard renders the company card (name, plan, employee count, billing status, next payroll date) within 3 seconds of selection.
7. Data refresh occurs automatically every 5 minutes during an active session without requiring a manual page reload.
8. A visible 'last updated' timestamp appears on each data pane so the agent knows data freshness at a glance.

PROBLEM 2 The Caller Identity Problem

Problem Statement

When a call arrives, an agent may only have a phone number. They must rapidly determine whether the caller is a company administrator or an individual employee, which company they belong to, and what history exists — before they can surface relevant information. The first 30–60 seconds of many calls are wasted on identification. Critically, the two caller types (admin vs. employee) require entirely different data to be surfaced, and the dashboard must handle both.

Source: Case Study Brief (Direct Quote)

"What data and tooling in a Customer Health Dashboard would be relevant for a customer support team member to fully understand the profile of the person, and their company, during an encounter?"

User Stories & Acceptance Criteria

US-2.1 *As a CSO agent, I want to search by company name, admin name, employee name, email, or phone number and receive results within 2 seconds — so I can identify the caller immediately without asking them to spell their company name.*

9. Search returns results in under 2 seconds across all indexed fields: company name, admin name, employee name, email address, and phone number.
10. Search handles partial matches and fuzzy input (e.g., 'Acme' returns 'Acme Corp' and 'Acme Consulting').
11. If a phone number matches multiple records (e.g., shared office line), the agent is presented with a disambiguation list to select the correct caller.
12. If no match is found, the agent sees a clear 'not found' state with an option to manually enter context and create a new interaction record.

US-2.2 *As a CSO agent, I want the dashboard to dynamically surface either a company-admin view or an individual-employee view depending on who I select — so I see exactly the data relevant to this caller's context without digging through irrelevant fields.*

13. Selecting a company admin populates: company profile card, plan type, employee count, billing status, admin's role and tenure, recent payroll runs, and open issues.
14. Selecting an individual employee populates: the employee's personal details (name, role, start date, state), their specific benefits elections, their last 3 pay stubs summary, and their personal interaction history.
15. Both views display the shared company-level context (plan type, account health, open issues) in a secondary pane so the agent always has company context regardless of who called.
16. Switching between admin view and employee view within the same session does not require a full page reload — context switches within 1 second.

PROBLEM 3 The Repeat Yourself Problem

Problem Statement

Justworks operates 24/7 support with rotating agents across phone, email, and chat. A customer who contacted support on Monday by email, Wednesday by chat, and calls on Friday has told their story three times to three different people. Interaction history is split between Zendesk and Salesforce in formats that are not instantly consumable during a live call. The result directly undermines Justworks' brand promise of personal, expert service.

Source: Case Study Brief (Direct Quote)

"Our customer interactions — calls, emails, chat — serve as an informative proprietary data set for us to learn from and action off of within our tooling."

User Stories & Acceptance Criteria

US-3.1 *As a CSO agent starting a call, I want to see a unified, chronological interaction timeline showing the last 10 touchpoints across all channels (phone, email, chat) — including the topic, outcome, and handling agent — so I can acknowledge prior contact immediately and never ask the customer to repeat themselves.*

17. Contact history displays the last 10 interactions across all channels in reverse chronological order.
18. Each entry shows: date/time, channel (phone/email/chat), topic summary (auto-pulled from Zendesk ticket title or subject line), handling agent name, and resolution status (resolved/pending/escalated).
19. Interaction history is unified from both Zendesk and Salesforce — no separate tabs or system switching required.
20. Entries are available within 5 minutes of an interaction closing in the source system (Zendesk/Salesforce sync latency ≤ 5 minutes).
21. If a prior interaction on the same topic is open (status: pending), it is visually flagged at the top of the history list with a distinct indicator.

US-3.2 *As a CSO agent wrapping up a call, I want to log a structured interaction record (channel, topic category, resolution type, outcome) directly in Customer Central — so future agents have immediately consumable context without reading through raw ticket threads.*

22. Agent can log an interaction record from within Customer Central without opening Zendesk separately.
23. Logging form includes required structured fields: channel, topic category (from a predefined taxonomy), resolution type, and a free-text summary field (max 500 characters).
24. Submitted records appear in the interaction timeline within 60 seconds.
25. Topic category taxonomy is maintained by an admin and does not require an engineering deploy to update.

PROBLEM 4 The Account Status Blindspot

Problem Statement

During a live interaction, an agent needs to immediately understand the operational health of a customer account — whether billing is current, when the next payroll runs, and whether there are any active issues or recent changes. This data lives in the production database and billing systems, not in Salesforce or Zendesk, meaning it is not accessible in the agent's current workflow without a separate system login.

Source: Case Study Brief (Direct Quote)

"We aim to ensure our CSO is informed enough to handle the direct problems they will encounter on a call."

User Stories & Acceptance Criteria

US-4.1 *As a CSO agent on a call about a billing or payroll issue, I want to see the customer's current billing status, payment history, and next scheduled payroll date in the company profile card — so I can confirm or address account-level concerns without asking the customer what they already know.*

26. Company profile card displays: current billing status (current / past due / suspended), outstanding balance if any, date of last payment, and next scheduled payroll date.
27. Data is sourced directly from the production DB or billing system via read-replica or internal API — not from Salesforce (which may have sync lag).
28. If a customer is past due, the billing status field is visually highlighted (e.g., amber/red indicator) to immediately draw the agent's attention.
29. Data freshness: billing and payroll fields reflect state as of within the last 15 minutes.

US-4.2 *As a CSO agent, I want to see a 'Recent Account Activity' feed showing the last 7 days of changes (employee additions/removals, benefits changes, payroll runs, plan changes) — so I can proactively identify what may have triggered the customer's call before they explain it.*

30. Recent Activity feed shows a reverse-chronological list of account events from the last 7 days.
31. Event types include: employee added, employee removed, benefits election changed, payroll run completed, payroll run failed, plan type changed.
32. Each event entry shows: event type, date/time, and affected entity (employee name if applicable).
33. If no activity exists in the last 7 days, the feed displays 'No recent account activity' rather than an empty state.

PROBLEM 5 The Proactive Blindspot

Problem Statement

Justworks explicitly wants CSO to move beyond reactive support and pre-empt customer problems before they occur — including surfacing product opportunities the customer may not know they need. Currently, the data that would enable proactive outreach (usage patterns, lifecycle events, product adoption gaps) exists across multiple systems but is never synthesized into agent-facing signals. Agents have no systematic way to surface these insights during or between interactions.

Source: Case Study Brief (Direct Quote)

"We aim to ensure our CSO is informed enough to handle the direct problems they will encounter on a call, but also pre-empt problems before they arise and proactively provide support and services that the customer may not know they need yet, including opportunities to utilize additional areas of our product offerings."

User Stories & Acceptance Criteria

US-5.1 *As a CSO agent during an interaction, I want to see a 'Heads Up' panel surfacing 1–3 contextually relevant flags for this account (e.g., upcoming payroll deadline, open enrollment* *window closing, pending employee with incomplete onboarding) — so I can proactively address known risks without the customer needing to bring them up.*

34. Heads Up panel displays a maximum of 3 flags per customer to prevent cognitive overload.
35. Flags are generated from a configurable rule set maintained by the PM/ops team — initial rule set covers: payroll deadline within 5 business days, open enrollment window closing within 14 days, employees with incomplete onboarding > 7 days old, and failed payroll run in the last 30 days.
36. Each flag displays: flag type, plain-language description, and a 'dismiss' option so the agent can acknowledge they've addressed it.
37. Dismissed flags do not reappear for the same account for 48 hours unless the underlying condition changes.
38. Flag rule set is configurable by an admin without an engineering deploy.
39. NOTE: This feature is a Phase 1 simplified version — automated health scoring and ML-based signals are Phase 2 scope.

US-5.2 *As a CSO agent, I want to see a product adoption summary showing which Justworks features the company is actively using versus what is available on their plan — so I can identify natural moments to recommend relevant capabilities during the conversation.*

40. Product adoption summary shows a list of features available on the company's current plan, each marked as: actively used (used in last 30 days), set up but inactive (configured but no usage in last 30 days), or not yet activated.
41. Data sourced from application event logs / product analytics — not manually maintained.
42. Summary updates once daily (overnight batch) — a data freshness label is displayed.
43. Feature list is maintained by the PM team and reflects current plan capabilities without an engineering deploy to update.

PROBLEM 6 The Open Issues Visibility Gap

Problem Statement

When a customer calls, the agent has no immediate way to see whether there are active open tickets, pending tasks, or unresolved items associated with that account. An agent might spend 5 minutes diagnosing an issue that another team is already working on, or inadvertently make commitments that conflict with a prior agent's resolution path. This is compounded by the fact that Zendesk ticket data is not surfaced in the same workspace as Salesforce account data.

Source: Derived from Case Study Brief

Derived from the case study's requirement that CSO be able to 'carry out routine tasks' and 'understand complete profiles about our customer companies.' An agent cannot manage open work if they cannot see it. Also informed by the JTBD analysis in the Deep Problem Analysis doc: 'Hand Off Cleanly — when I can't fully resolve an issue, I want to capture enough context that the next person can pick up seamlessly.'

User Stories & Acceptance Criteria
US-6.1 *As a CSO agent beginning an interaction, I want to immediately see all open Zendesk tickets associated with this company or individual — including ticket priority, the assigned agent, ticket age, and a brief topic summary — so I can acknowledge active issues without accidentally re-opening resolved work or creating duplicate tickets.* 44. Open Issues pane displays all active Zendesk tickets for the selected company/individual where status is not 'closed' or 'solved'. 45. Each ticket entry shows: ticket ID, priority (low/normal/high/urgent), status, assigned agent name, days open, and a topic summary (max 100 characters from ticket subject). 46. Tickets are sorted by priority (urgent first) then by age (oldest first). 47. Clicking a ticket entry opens it in Zendesk in a new browser tab — does not navigate away from Customer Central. 48. If there are zero open tickets, the pane displays a clear 'No open issues' state. 49. Ticket data syncs from Zendesk every 5 minutes — a 'last synced' timestamp is displayed.
US-6.2 *As a CSO agent, I want to be able to link the current interaction to an existing open ticket directly from Customer Central — so the ticket stays updated without requiring me to navigate to Zendesk separately.* 50. Agent can associate the current session with an existing open ticket by selecting it from a dropdown within Customer Central. 51. Once linked, the current interaction's log entry references the ticket ID. 52. This does not require opening Zendesk — the link is established entirely within Customer Central.

MVP Solution → Problem Mapping

The eight MVP features below are the direct responses to the six problems defined above. Each solution is mapped to the problem(s) it addresses, with a brief rationale explaining the design logic connecting the two. Some solutions address multiple problems; those connections are noted explicitly.

GREEN → Solution directly eliminates the problem	AMBER → Solution partially addresses or supports the problem

ID	MVP Feature	Problems Addressed (P# = Problem Number)

S1	**Unified Company Profile Card**	● **P1 — The Context-Switching Tax** ● **P4 — The Account Status Blindspot**
S2	**Universal Caller Search**	● **P2 — The Caller Identity Problem**
S3	**Dynamic Caller View (Admin vs. Employee)**	● **P2 — The Caller Identity Problem** ○ P1 — The Context-Switching Tax
S4	**Unified Interaction Timeline**	● **P3 — The Repeat Yourself Problem** ○ P1 — The Context-Switching Tax ○ P6 — The Open Issues Visibility Gap
S5	**Recent Account Activity Feed**	● **P4 — The Account Status Blindspot** ○ P1 — The Context-Switching Tax
S6	**Open Issues Pane**	● **P6 — The Open Issues Visibility Gap** ○ P3 — The Repeat Yourself Problem
S7	**Heads Up Flags Panel**	● **P5 — The Proactive Blindspot**
S8	**Product Adoption Summary**	● **P5 — The Proactive Blindspot** ○ P4 — The Account Status Blindspot

● **Primary** = solution directly eliminates the problem ○ **Secondary** = solution partially addresses or supports the problem

Solution Definitions & Problem Rationale

The following pages detail each MVP feature: what it is, where the data comes from, and the explicit reasoning connecting the solution back to the problem(s) it addresses.

S1 Unified Company Profile Card

What it is

A persistent top-of-screen card showing: company name, plan type (Payroll / PEO Basic / PEO Plus / EOR), employee count, state(s) of operation, billing status, and next payroll date. Sourced from the Justworks production DB via read-replica.

Data Source Justworks Production DB (Companies, Plans, Billing tables)

PRIMARY — Directly eliminates: P1 — The Context-Switching Tax

The company profile card is the anchor that eliminates the need to open Salesforce for basic account identification. By surfacing plan type, billing status, and payroll date in one persistent view, the agent never needs to leave Customer Central for the most common company-level questions.

PRIMARY — Directly eliminates: P4 — The Account Status Blindspot

Billing status and next payroll date — the two most commonly needed operational data points — are surfaced directly from the production DB, not from Salesforce (which may have sync lag). This is the direct solution to agents not having real-time account health data in their current workflow.

S2 Universal Caller Search

What it is

A search bar enabling agents to find any customer by company name, admin name, employee name, email address, or phone number — returning results in under 2 seconds with disambiguation support for multi-match results.

Data Source Justworks Production DB + Salesforce Contacts, indexed search layer

PRIMARY — Directly eliminates: P2 — The Caller Identity Problem

This is the direct solution to the identity problem. The agent currently has to search across Salesforce and Zendesk separately. A single search bar across all identifying fields collapses that to one action. The sub-2-second response requirement ensures it is fast enough to use while the caller is still introducing themselves.

S3 Dynamic Caller View (Admin vs. Employee)

What it is

Upon selecting a search result, the dashboard dynamically surfaces either the Company Admin View (company profile, payroll data, benefits admin, employee roster) or the Individual Employee View (personal pay details, benefits elections, leave balances, personal interaction history) — determined by the entity type selected.

Data Source Justworks Production DB (Members, Plans, Benefits), Zendesk (interaction history)

PRIMARY — Directly eliminates: P2 — The Caller Identity Problem

Identifying the caller is only half the problem. The other half is surfacing the right data once they are identified. A company admin calling about payroll needs completely different information than an employee calling about their benefits. This feature completes the solution to P2 by ensuring the context presented matches who is actually on the line.

SECONDARY — Also supports: P1 — The Context-Switching Tax

Without dynamic view switching, an agent would still need to navigate to different sections or systems for admin vs. employee data. By having the dashboard reconfigure itself around the caller type, the agent stays in one place regardless of who they are speaking with.

S4 Unified Interaction Timeline

What it is

A reverse-chronological feed of the last 10 customer interactions across all channels (phone, email, chat), showing: timestamp, channel, topic summary, handling agent, and resolution status. Data unified from Zendesk and Salesforce into a single display, refreshed every 5 minutes.

Data Source Zendesk API (Tickets, Comments) + Salesforce (Cases, Activity History)

PRIMARY — Directly eliminates: P3 — The Repeat Yourself Problem

This is the direct and complete solution to P3. The agent no longer has to open Zendesk and Salesforce in separate tabs and mentally reconstruct a conversation history. The unified timeline surfaces everything in one consumable feed, enabling the agent to acknowledge prior contact within the first 15 seconds of the call.

SECONDARY — Also supports: P1 — The Context-Switching Tax

Interaction history was one of the primary drivers of tab-switching in the current workflow — agents opening Zendesk in a second tab to read ticket history. Consolidating it eliminates one of the most frequent cross-system navigation events.

SECONDARY — Also supports: P6 — The Open Issues Visibility Gap

The timeline includes status indicators (resolved / pending / escalated), which gives the agent a quick read on whether prior interactions are still open — though the dedicated Open Issues pane (S6) provides the fuller picture.

S5 Recent Account Activity Feed

What it is

A 7-day event log of account-level changes: employee additions/removals, benefits elections changed, payroll runs (completed or failed), and plan upgrades. Reverse-chronological, sourced from application event logs and the production DB.

Data Source Application event stream / data warehouse, Justworks Production DB

PRIMARY — Directly eliminates: P4 — The Account Status Blindspot

Billing status alone (from the Profile Card) tells the agent what the account looks like right now. The Activity Feed tells them what has changed recently — which is often the trigger for the call. An agent seeing that a payroll run failed 2 days ago can connect that to a billing question before the customer explains it.

SECONDARY — Also supports: P1 — The Context-Switching Tax

Activity data currently lives in the Justworks production DB or data warehouse — a system agents would need a separate login to access. Surfacing it in Customer Central eliminates another tab from the agent's workflow.

S6 Open Issues Pane

What it is

A dedicated panel showing all active Zendesk tickets associated with the selected company or individual. Each entry shows: ticket ID, priority, status, assigned agent, age in days, and topic summary. Sorted by priority then age. Synced from Zendesk every 5 minutes.

Data Source Zendesk API (Tickets, Users)

PRIMARY — Directly eliminates: P6 — The Open Issues Visibility Gap

This is the complete and direct solution to P6. The agent can see all open work before they say a word, preventing duplicate ticket creation, conflicting resolution paths, and wasted diagnostic time on issues already in progress.

SECONDARY — Also supports: P3 — The Repeat Yourself Problem

Seeing open tickets at a glance is the fastest way for an agent to say 'I can see you already have an open case for this — let me pick that up.' It reinforces the 'we know your history' brand promise that P3 is trying to protect.

S7 Heads Up Flags Panel

What it is

A configurable rule-based panel surfacing up to 3 contextual flags per account: payroll deadline within 5 business days, open enrollment closing within 14 days, employees with incomplete onboarding over 7 days, or failed payroll in the last 30 days. Flags are dismissible and managed by the PM/ops team without an engineering deploy.

Data Source Justworks Production DB, Calendar/business rules engine, Application event stream

PRIMARY — Directly eliminates: P5 — The Proactive Blindspot

This is the Phase 1 implementation of Justworks' explicit ask for proactive support capability. Rather than waiting for an ML-based health score (Phase 2), the Heads Up panel delivers immediate proactive value through a configurable rule engine — shipping something useful now without over-engineering. The 3-flag limit is intentional: it forces prioritization and prevents the panel from becoming noise.

S8 Product Adoption Summary

What it is

A feature-by-feature breakdown of what is available on the customer's current plan vs. what they are actively using (used in last 30 days), set up but dormant, or not yet activated. Updated nightly from application analytics. Enables the agent to spot natural upsell or enablement moments during a conversation.

Data Source Application event logs / product analytics (feature usage events), Plan configuration data

PRIMARY — Directly eliminates: P5 — The Proactive Blindspot

The case study brief explicitly calls out 'opportunities to utilize additional areas of our product offerings' as part of the proactive support mandate. The adoption summary gives the agent a data-backed reason to raise product features the customer is not using — moving from reactive issue resolution to consultative recommendation without requiring a separate research step.

SECONDARY — Also supports: P4 — The Account Status Blindspot

Understanding what a customer is and isn't using is part of understanding their full account health. An agent who can see 'time tracking is set up but unused' has more complete account context, which also helps them diagnose issues more accurately (e.g., a payroll discrepancy might relate to time tracking being misconfigured but not activated).