Customer Central

Customer Health Dashboard

Strategic Proposal & MVP Scope

> "The agent knows ***everything*** before the customer finishes saying hello."

Darrien Watson

Group Product Manager Candidate · Internal Tools & Operations

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Justworks

The Agent's Reality Today

CSO agents spend the first few minutes of every call piecing together customer context across 5-6 disconnected systems instead of actually helping the customer.

T+0s	Phone rings. Agent sees a phone number.
T+10s	"Hi, this is Sarah from Acme Corp." Agent types into Salesforce. Waits.
T+25s	Account loads. Opens Zendesk in second tab. Searches tickets.
T+45s	Finds 3 tickets. Clicks into most recent. Reads through it.
T+60s	Sarah has been talking for 50 seconds. Agent is half-listening, half-reading.
T+90s	Opens Justworks admin dashboard in a third tab for payroll details.
T+120s	Two minutes in. Agent finally has enough context to engage.

Sarah's experience:
"I've been explaining this for two minutes and I'm not sure they're even listening."

5–6 systems per call

Salesforce
Zendesk
Justworks Admin Dashboard
Internal Knowledge Base
Slack (escalation)
Tableau / Reporting

Six Compounding Problems

01

Context-Switching Tax

5–6 systems per call. 10–15 seconds per switch. 2–3 minutes of dead air per interaction.

02

Caller Identity Problem

Agent doesn't know: admin or employee? Which company? Different caller types need different data.

03

"Repeat Yourself" Problem

Customer explains issue 3 times to 3 agents. #1 destroyer of the Justworks brand promise.

04

Knowledge Gap

Payroll + benefits + HR + compliance across 50 states. When agents don't know, they escalate — reducing FCR.

05

Proactive Blindspot

Data for proactive insights exists but is never synthesized into agent-facing signals.

06

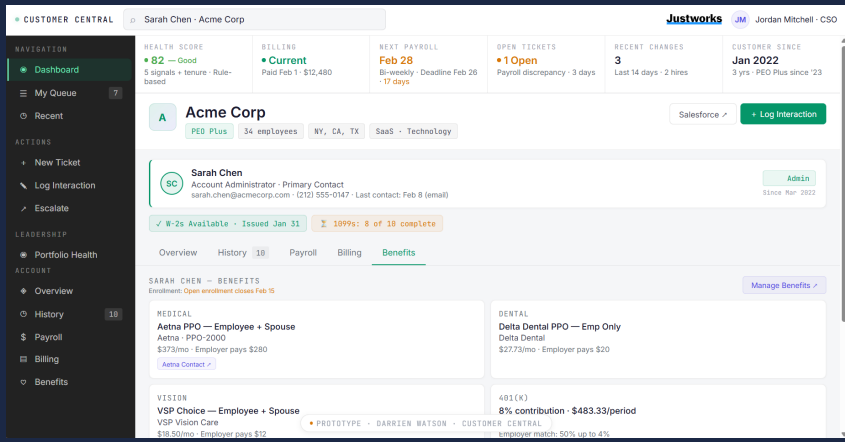
Scaling Threat

10,000+ customers. Tribal knowledge doesn't scale. Quality degrades or headcount grows linearly.

The Ideal Encounter

Customer Central puts the complete customer picture —identity, history, account status, and a health score that instantly signals what's working and what's not — on one screen in under 3 seconds, so the agent walks into every conversation already knowing where to focus.

T+0s	Agent searches Sarah's name. Customer Central populates instantly.
T+3s	At a glance: Acme Corp, PEO Plus, 34 employees, billing current, next payroll Feb 28.
T+8s	Scans interaction timeline — Sarah emailed 3 days ago about a payroll discrepancy.
T+15s	"Sarah, I see you reached out about the payroll issue — are you calling to follow up?"
T+30s	Resolved. One screen. Thirty seconds.



120 seconds of fumbling vs. **30 seconds** of resolution

NAVIGATION
Dashboard
My Queue 7
Recent

ACTIONS
New Ticket
Log Interaction
Escalate

LEADERSHIP
Portfolio Health

ACCOUNT
Overview
History 10
Payroll
Billing
Benefits

HEALTH SCORE	BILLING	NEXT PAYROLL	OPEN TICKETS	RECENT CHANGES	CUSTOMER SINCE
82 — Good	Current	Feb 28	1 Open	3	Jan 2022
5 signals + tenure · Rule-based	Paid Feb 1 · $12,480	Bi-weekly · Deadline Feb 26 · 17 days	Payroll discrepancy · 3 days	Last 14 days · 2 hires	3 yrs · PEO Plus since '23

A

Acme Corp

PEO Plus | 34 employees | NY, CA, TX | SaaS · Technology

Salesforce ↗ + Log Interaction

SC **Sarah Chen**
Account Administrator · Primary Contact
sarah.chen@acmecorp.com · (212) 555-0147 · Last contact: Feb 8 (email)
Admin
Since Mar 2022

✓ W-2s Available · Issued Jan 31
⏳ 1099s: 8 of 10 complete

Overview | History 10 | Payroll | Billing | Benefits

SARAH CHEN — BENEFITS

Enrollment: Open enrollment closes Feb 15

Manage Benefits ↗

MEDICAL
Aetna PPO — Employee + Spouse
Aetna · PPO-2000
$373/mo · Employer pays $280
Aetna Contact ↗

DENTAL
Delta Dental PPO — Emp Only
Delta Dental
$27.73/mo · Employer pays $20

VISION
VSP Choice — Employee + Spouse
VSP Vision Care
$18.50/mo · Employer pays $12

401(K)
8% contribution · $483.33/period
Employer match: 50% up to 4%

PROTOTYPE · DARRIEN WATSON · CUSTOMER CENTRAL

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Portfolio Health Overview

Health distribution across all managed accounts. Scores are rule-based: Base = (Billing × 0.30) + (Payroll × 0.25) + (Support × 0.20) + (Satisfaction × 0.15) + (Activity × 0.10), then Final = Base × Tenure Factor

Tenure Factor: <30 days = 0.75, 30-90 days = 0.85, 90-180 days = 0.95, 180+ days = 1.00

487 Healthy | 312 Good | 89 Attention | 21 At Risk | 3 Critical

COMPANY	PLAN	EMPLOYEES	HEALTH SCORE	BAND	TOP RISK SIGNAL
Acme Corp	PEO Plus	34	82	Good	1 open ticket (3 days, medium)
Globex Industries	PEO Plus	128	95	Healthy	None — all signals green
Initech	PEO Basic	22	58	Attention	CSAT below 60 (2 negative surveys)
Massive Dynamic NEW — Feb 2026	PEO Plus	87	53 (base 70 × 0.75)	Attention	New customer (<30 days) — tenure factor 0.75 applied
Prestige Worldwide	Payroll Only	12	34	At Risk	Payment failed — 12 days past due
Wayne Enterprises	PEO Plus	210	91	Healthy	None — all signals green
Soylent Corp	PEO Basic	8	22	Critical	Payment 30+ days past due, no CSAT

The Business Opportunity

> *Customer service is Justworks' primary competitive differentiator.*
> *Great people with great tools > great people with fragmented tools.*

9	+60	10K+	$27B
Consecutive Stevie Awards	NPS Score (Industry-Leading)	Customer Companies	Payroll Processed (2024)

As Justworks scales from 10K to 50K customers, the moat either widens with tooling investment — or erodes without it. Even a simple health score lets the CSO head answer “how are our customers doing?” with a click instead of 2 days of manual deck-building.

How I Got to the MVP

Problems first, features never

01

Extract Jobs from Prompt

6 distinct jobs traced to prompt language

02

Build Problem Inventory

20 CSO problems
12 health questions
ICE scored

03

Discover Convergence

Both lists need same 6 data foundations

04

Apply Trust Progression

Phase 1: accuracy + transparent health score
Phase 2: ML-adaptive scoring + alerts
Phase 3: predictive intelligence

The Tiebreaker: When two features are equal on effort, pick the one that also builds toward the AI-native future. Structured records over free-text. API-first over monolith. Same effort, wildly different future leverage.

Phase 1 MVP — 11 Features

FOUNDATION STORIES — FULL BUILDS

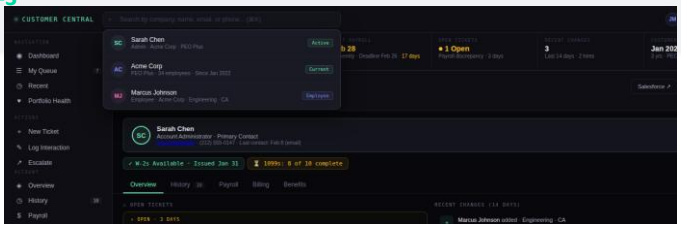
FS-1 **Instant Caller Recognition**

Search by name, phone, email. Results <2s.

FS-2 **Complete Interaction History**

Merged timeline from Zendesk + Salesforce.

FS-3 **Account Status Strip**



PROBLEM STORIES — BUILD + DEEP LINKS

PS-1	Pay Stub Context	FULL BUILD
PS-2	Payroll Run Status	DEEP LINK
PS-3	Tax Document Access	DEEP LINK
PS-4	Benefits Quick-View	DEEP LINK
PS-5	Invoice Timeline	DEEP LINK
PS-6	Payment Cascade	FULL BUILD

+ HS-1: Lightweight Health Score (rule-based, 5 signals, agent-verifiable) + HS-2: Leadership Portfolio View (accounts ranked by health). Deep links deliver 80% of value at 20% of cost.

Dashboard Wireframe — Information Architecture

What the agent sees in the first 10 seconds after opening a customer profile

Search: company name, admin name, phone, email — FS-1

CALLER CARD

Sarah Chen
Admin · Acme Corp
sarah@acme.com · (555) 123-4567
Last contact: 3 days ago (email)

ACCOUNT STATUS + HEALTH — FS-3

Health: 82 Good	PEO Plus · 34 emp	Billing: Current
Next payroll: Feb 28	2 open tickets	

INTERACTION TIMELINE — FS-2

Feb 9	**Email**	Payroll discrepancy — new hire	OPEN
Jan 28	**Phone**	Benefits enrollment question	Resolved
Jan 15	**Chat**	Password reset for employee	Resolved

QUICK ACTIONS

→ Pay Stub Context (PS-1)

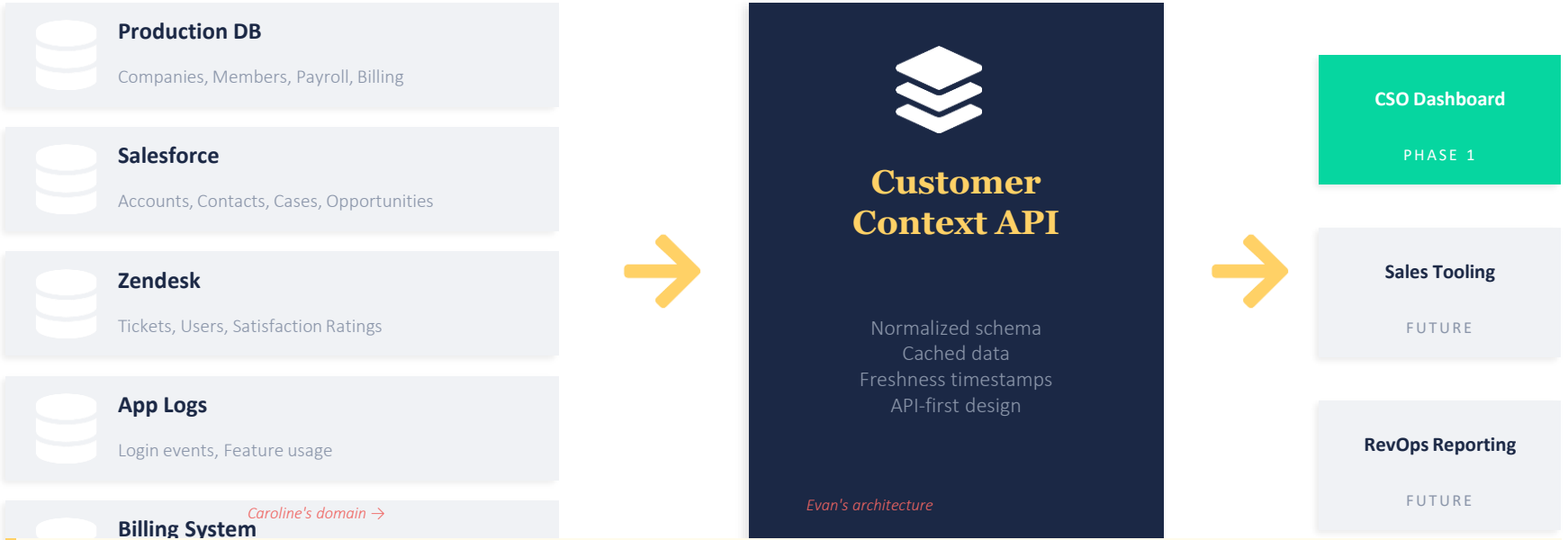
→ Payroll Run Status (PS-2)

→ Benefits Quick-View (PS-4)

→ Invoice Timeline (PS-5)

Starting point for design discussion with Annelise. Layout reflects information hierarchy: WHO → CONTEXT → HISTORY → ACTIONS

Data Architecture — 5 Sources, 1 API Layer



Key question for Caroline: Do we have a shared key between Salesforce Account IDs and Zendesk Org IDs today, or do we need to build that join?

Day 1 ticket: Spike — verify SFDC Account ID → Zendesk Org ID join for 95%+ accounts

Edge cases: Stale data → freshness badges | Zendesk down → cached state | Dual admin → profile selector

7-Week Roadmap

Wk 0	Wk 1	Wk 2–4	Wk 5	Wk 6	Wk 7
Discovery	**Spikes**	**Build Sprint**	**Alpha**	**Beta**	**Launch**
Shadow agents Baseline metrics Validate assumptions	De-risk integrations Salesforce join key Payroll API access	Foundation stories Problem stories Data layer + UI + health score	5 volunteer agents Daily feedback Hotjar recording Health score validation	Full pod (20–30) Structured surveys Fix critical issues	Full rollout Training sessions Champions program

Team

SWE — Search & Identity	SWE — Panels & History	1 Data Engineer (Data Services)
1 Product Designer	1 PM (You)	QA (Shared)

> Week 1 spikes determine final scope. We adjust based on reality, not assumptions. Stage gates prevent bad rollouts.

Phase 1 ships before Q2 open enrollment season — with health scores validated against agent intuition in Week 5 alpha.

Success Metrics

PRIMARY

15–20% ↓

Average Handle Time

Less context-switching = faster resolution

10% ↑

First Contact Resolution

Better information = fewer escalations

>80% daily active

Tool Adoption

Must replace, not supplement

GUARDRAILS

NPS maintains ≥ +60 | Data accuracy ≥ 95%

LEADING INDICATORS

Search-to-context time < 5 seconds — the moment the agent has what they need | Health Score Accuracy ≥ 80% alignment with agent intuition

What I Don't Know

- I haven't sat with a CSO agent
- I don't know the actual top call drivers by volume
- I don't know the real data architecture
- Every UX decision in the prototype is an informed assumption

Let's Build Together

45 minutes. 4 exercises. Each produces a concrete output.

1 Validate Journey	2 Prioritize Features	3 Lock Scope & Sketch	4 Risks & Alignment
→ Confirmed agent workflow map	→ Ranked feature list w/ consensus	→ IN / OUT / LATER board	→ Top 3 dependencies + owners

Key workshop question: *What does Salesforce already surface that we can embed vs. net-new? And: are these 5 health signals the right ones, or are we missing something agents already track mentally?*