Deep Problem Analysis: Customer Health Dashboard

The Who, The Jobs, The Problems

PART 1: THE WHO

The prompt says "customer support team member" — but that's not one user. There are distinct personas within CSO, and they have different needs during an encounter.

Primary User: The CSO Agent (Front-Line)

Who they are: This is the person picking up the phone, responding to chat, or answering the email. They're likely somewhere between 1-5 years of experience in customer support, possibly with a background in HR, benefits administration, or financial services. Justworks hires for empathy and domain knowledge — these aren't generic call center reps reading scripts. They're expected to be knowledgeable across payroll, benefits, compliance, and HR.

Their operating context:

- They handle **multi-product complexity**: A single call might span payroll processing, benefits enrollment, tax compliance, and PTO policy — across different Justworks product lines (Payroll, PEO Basic, PEO Plus, EOR)
- They serve **two distinct caller types** with completely different needs (more on this below)
- They're measured on quality AND efficiency — NPS of +60 doesn't happen by accident, and it doesn't survive if handle times balloon
- They're operating under **time pressure with emotional stakes**: The person calling often has a real, urgent problem — a paycheck didn't land, benefits coverage is unclear, a tax filing is wrong. These aren't nice-to-have questions
- They work **24/7 shifts** across phone, email, and chat — context about prior interactions is critical because the agent on this call is probably NOT the agent on the last call
- They're likely toggling between **3-5 systems** today: Justworks admin dashboard,

Salesforce, Zendesk, internal knowledge base, possibly Slack for escalation

What makes them different from a generic support agent: Justworks CSO agents operate more like consultants than support reps. The prompt says Justworks believes "small businesses should be able to access and work directly with real people to solve their most complex problems." These agents are expected to advise, not just resolve. That requires deeper context than a typical support dashboard provides.

The People They're Talking To (The "Person" in the Prompt)

This is critical. The prompt specifically asks about understanding "the profile of the person, AND their company." That "person" is not always the same type of person, and the information needs change dramatically based on who's calling.

Caller Type A: The Company Administrator

Who they are: The founder, HR manager, office manager, or operations lead who manages the company's Justworks account. They're the "admin" in the system. Small companies (2-15 employees) often have the founder as admin. Larger companies (15-200+) might have a dedicated HR person or office manager.

Why they call:

- Payroll issues: Failed payroll run, incorrect withholdings, missed deadline, adding/removing employees
- Benefits administration: Open enrollment questions, adding dependents, carrier issues, COBRA
- Compliance questions: State tax registrations, new hire reporting, labor law requirements for new states
- Account management: Billing disputes, plan changes (Payroll → PEO, Basic → Plus), adding features
- Onboarding: Setting up new employees, I-9 completion, benefits elections
- Off-boarding: Terminating employees, final paychecks, COBRA triggers

What the agent needs to know about them:

- Their role and permissions level in the Justworks system
- How long they've been the admin (new admin = more hand-holding needed)

- Their communication history (have they called about this before?)
- Their technical sophistication (do they self-serve or call for everything?)
- Whether they're the decision-maker or an intermediary

Caller Type B: The Individual Employee

Who they are: An employee at a company that uses Justworks. They didn't choose Justworks — their employer did. They're calling because something about their paycheck, benefits, or employment is confusing or wrong.

Why they call:

- Pay questions: "Why is my paycheck different this period?" Withholding changes, deductions they don't recognize
- Benefits: "How do I use my health insurance?" "I need to add my newborn to my plan" "What's my deductible?"
- Life events: Marriage, baby, divorce, moving to a new state — all trigger benefits and tax changes
- Tax documents: W-2 questions, address changes, withholding elections
- PTO/Leave: Balance questions, leave policies, state-specific leave requirements
- Platform access: Login issues, password resets, trouble navigating the self-service portal

What the agent needs to know about them:

- Which company employs them (and what plan that company is on — this determines what's available)
- Their personal details: employment start date, position, salary (for payroll questions), state of residence
- Their benefits elections: what plans they're enrolled in, who their dependents are
- Their recent pay history: last few paystubs, any changes
- Whether their employer admin has already been in touch about the same issue
- Their emotional state: an employee calling about a missing paycheck is in a very different headspace than one asking about 401(k) options

Caller Type C (Less Frequent): The Accountant/Bookkeeper

Who they are: A third-party financial professional acting on behalf of a Justworks customer company. They have limited platform access and specific data needs.

Why they call:

- Reconciliation questions, journal entries, integration issues (QuickBooks, Xero, Sage Intacct)
- Tax filing clarifications
- Year-end reporting

Secondary User: The CSO Team Lead / Manager

Not on the phone, but consuming dashboard data differently. They need:

- Aggregate views: How are my team's accounts doing overall?
- Escalation context: When an agent escalates, the manager needs the full picture fast
- Coaching inputs: Which accounts are consuming disproportionate support time and why?

Tertiary User: CSO Leadership (Natalie Miranda, VP level)

They're not using the dashboard call-by-call, but they need the health data to:

- Identify systemic issues (is a specific product line generating disproportionate support volume?)
- Report on customer health trends to the executive team
- Make resourcing decisions (which teams need more agents?)
- Inform product feedback loops (what are customers struggling with most?)

PART 2: JOBS TO BE DONE

Framing the CSO agent's work through the JTBD lens — what are they actually trying to accomplish?

Functional Jobs

Job 1: Orient Myself Instantly

Job statement: When I receive an inbound interaction, I want to immediately understand who this person is, what company they belong to, and what their relationship with Justworks looks like — so I can greet them personally and demonstrate that we know them.

Why this matters: The first 15 seconds of a call set the tone. If the agent says "Hi Sarah, I can see you're the admin for Acme Corp on our PEO Plus plan" — that's a completely different experience than "Can you spell your company name for me?" The Justworks brand promise is personal, expert service. Fumbling for context undermines that promise.

Current friction: The agent likely has to ask the caller to identify themselves, then manually search across systems to pull up their profile. During this time, the caller is waiting, possibly re-explaining something they've already told another agent.

Job 2: Understand the Full History

Job statement: When a customer describes their issue, I want to see their complete interaction history across all channels — so I never ask them to repeat themselves and I can build on what's already been discussed.

Why this matters: Nothing erodes trust faster than "Can you explain the issue again?" Justworks customers interact via phone, email, and chat. If a customer emailed last week, chatted yesterday, and is calling today — the agent on the phone needs the full thread. This is especially critical because of 24/7 coverage with agent rotation.

Current friction: Interaction history is likely split between Zendesk (tickets/chats) and Salesforce (account notes/cases). The agent has to cross-reference manually, often while the customer is on the line.

Job 3: Diagnose the Issue Accurately

Job statement: When a customer presents a problem, I want to have the relevant account, payroll, benefits, and compliance data at my fingertips — so I can diagnose the root cause without escalating or putting the customer on hold.

Why this matters: First-contact resolution is a key metric. Every escalation or callback costs time and erodes satisfaction. Justworks' domain complexity (payroll + benefits + compliance + HR across 50 states) means the data needed to diagnose issues is spread across multiple systems and often requires domain expertise to interpret.

Current friction: An agent hearing "my paycheck was wrong this period" needs to see: the employee's pay rate, hours (if hourly), deductions, tax withholdings, any recent changes — and compare it to the prior period. That data might live in the production database, not in

Salesforce or Zendesk. Similar complexity exists for benefits questions (which plan, which carrier, what's covered) and compliance questions (which state, which regulations apply).

Job 4: Resolve and Take Action

Job statement: When I've diagnosed an issue, I want to take corrective action directly from my workspace — so I can resolve the problem in real-time instead of creating a ticket for someone else.

Why this matters: The prompt says Customer Central should "allow CSO to carry out routine tasks." If an agent can see the problem but has to switch to a different system to fix it, that's broken. The goal is resolution, not documentation.

Current friction: Even if the agent identifies the issue, they may not have the permissions or the tooling in their current workspace to fix it. They have to log into the Justworks admin panel, or create a ticket for a backend team, or escalate to a specialist. Each handoff adds delay and risk of miscommunication.

Job 5: Anticipate and Prevent

Job statement: When I'm interacting with a customer, I want to see signals that indicate emerging problems or unmet needs — so I can proactively address them before they become escalations.

Why this matters: This is the strategic shift the prompt is asking for. Justworks doesn't just want reactive support — they want CSO to be a proactive engine. The prompt says: "pre-empt problems before they arise and proactively provide support and services that the customer may not know they need yet."

Examples of proactive moments:

- "I see your open enrollment window closes in 2 weeks and 12 of your 30 employees haven't made elections yet — would you like us to send a reminder?"
- "You're now operating in 3 states. Have you considered our PEO Plus plan? It would cover your compliance requirements automatically."
- "Your company has grown from 8 to 22 employees this year. Many companies your size find value in our time tracking add-on."
- "I notice your last 3 payroll runs had manual adjustments. Would you like us to walk through your setup to reduce those?"

Current friction: Agents have no systematic way to surface these insights. They might catch them ad hoc if they're experienced and curious, but it's not built into the workflow.

The data exists in various systems but isn't synthesized into actionable signals.

Job 6: Hand Off Cleanly

Job statement: When I can't fully resolve an issue, I want to capture enough context that the next person (specialist, manager, or next-shift agent) can pick up seamlessly — without the customer having to re-explain.

Why this matters: In a 24/7 operation with shift rotations, clean handoffs are essential. The customer doesn't care about internal team structures — they care that their issue progresses.

Current friction: Notes are likely scattered across Zendesk ticket comments, Salesforce case notes, and possibly Slack threads. There's no single "source of truth" for the ongoing customer narrative.

Emotional Jobs

Job 7: Feel Confident, Not Anxious

Job statement: When I pick up a call about a topic I'm less familiar with (e.g., a complex tax question or an unusual benefits scenario), I want to quickly access relevant context and guidance — so I can project expertise even when I'm learning on the fly.

Why this matters: CSO agents are expected to be knowledgeable across an enormous domain. No one person can be an expert on payroll tax withholdings in all 50 states AND every health insurance carrier AND every compliance requirement. The dashboard should be a confidence amplifier, not just a data dump.

What this implies for the dashboard: Contextual knowledge surfacing — not just raw data, but interpretation aids. For example, if a company has employees in California, surface California-specific requirements. If an employee is asking about their Aetna plan, surface Aetna-specific FAQs.

Job 8: Feel Like an Advisor, Not a Call Center Rep

Job statement: I want to deliver the kind of personalized, consultative service that makes Justworks' reputation — so I feel pride in my work and the customer feels genuinely cared for.

Why this matters: Justworks' entire brand identity rests on their support being personal and expert. The tools need to elevate the agent's role, not commoditize it. If the dashboard reduces the agent to reading information off a screen, it's failed. If it arms them to have a consultative conversation, it's succeeded.

What this implies for the dashboard: The information architecture matters enormously. The dashboard shouldn't feel like a data report — it should feel like a dossier that helps the agent be a better advisor. Think of it less like a Zendesk ticket view and more like a briefing document.

Social Jobs

Job 9: Demonstrate to My Manager That I'm Effective

Job statement: I want my interactions to be documented in a way that shows I'm thorough, empathetic, and efficient — so I'm recognized for quality work.

What this implies: The dashboard should make it easy to log interactions with appropriate context, not create a documentation burden.

Job 10: Earn the Customer's Trust for Justworks

Job statement: Every interaction I have represents the Justworks brand. I want to deliver an experience that makes the customer think "this is why I pay for Justworks" — reinforcing their decision to stay.

What this implies: The dashboard needs to enable "wow moments" — small touches that signal deep knowledge and care. "I see you just celebrated your company's 3rd anniversary with us — congratulations!" or "I see you recently moved to PEO Plus — let me make sure you're getting the full value from the upgrade."

PART 3: THE PROBLEMS

What's broken today that makes these jobs hard?

Problem 1: The Context-Switching Tax

The reality: To handle a single customer call, a CSO agent likely opens or toggles between:

1. **Zendesk** — to see the ticket/chat history and log the current interaction
2. **Salesforce** — to see the account record, sales notes, plan details, company profile

3. **Justworks Admin Dashboard** — to see actual product data (payroll records, benefits elections, employee roster, compliance status)
4. **Internal Knowledge Base** — for policy/procedure guidance
5. **Slack** — to ask a specialist a question in real-time
6. **Possibly Tableau/reporting** — to look up account-level analytics

The cost: Every system switch costs ~10-15 seconds of cognitive load plus navigation time. Over a 15-minute call, an agent might switch 8-12 times. That's 2-3 minutes of dead air or "let me look that up" moments. Across thousands of daily interactions, this compounds into significant productivity loss and degraded customer experience.

The deeper problem: It's not just time — it's cognitive fragmentation. The agent is assembling a mental model of the customer from pieces scattered across systems. They can miss connections that would be obvious if the data were unified. For example: the Zendesk ticket shows an employee complained about a benefits issue, but the Salesforce record shows the company is considering cancellation — an experienced agent would connect those dots, but only if they see both signals.

Problem 2: The Caller Identity Problem

The reality: When a call comes in, the agent may only have a phone number. They need to figure out:

- Is this a company admin or an individual employee?
- Which company do they belong to?
- What's their name and role?
- Have they called before?

The cost: The first 30-60 seconds of many calls are wasted on identification. Worse, if the agent can't quickly identify the caller, they can't pull up the right context, and the entire interaction starts from a deficit.

The deeper problem: Caller Type A (admin) and Caller Type B (employee) need completely different information surfaced. An admin calling about payroll needs the company-level payroll dashboard. An employee calling about their benefits needs their personal benefits summary. If the dashboard doesn't differentiate, the agent is digging through irrelevant data.

Problem 3: The "Repeat Yourself" Problem

The reality: A customer who emailed on Monday, chatted on Wednesday, and is calling on

Friday has likely explained their issue three times to three different agents. Each time, they lose a little more faith in the “personal service” promise.

The cost: Direct customer satisfaction erosion. This is the #1 destroyer of the Justworks brand promise. It signals to the customer that Justworks doesn’t have its act together internally, regardless of how friendly each individual agent is.

The deeper problem: The interaction data exists — it’s in Zendesk. But it’s not surfaced in a way that makes it instantly consumable. An agent would have to read through ticket threads to reconstruct the narrative, which they don’t have time to do at the start of a call.

Problem 4: The Knowledge Gap

The reality: Justworks operates across payroll, benefits, HR, and compliance — each of which is a deep domain. Benefits alone spans multiple carriers, plan types, state regulations, and life event rules. No single agent can hold all of this in their head.

The cost: When an agent doesn’t know the answer, they either escalate (adding delay and reducing FCR) or provide an incomplete/incorrect answer (creating risk and reducing trust). Both outcomes are bad.

The deeper problem: The issue isn’t agent training — it’s that the right information isn’t surfaced in context. If the agent is talking to a California-based employee on an Aetna plan about adding a dependent, the dashboard should surface the Aetna dependent addition process and California-specific requirements. Instead, the agent probably has to search the knowledge base separately.

Problem 5: The Proactive Blindspot

The reality: The prompt explicitly asks for the ability to “pre-empt problems before they arise” and “proactively provide support and services the customer may not know they need yet.” This doesn’t exist today.

The cost: Missed opportunities for upsell/cross-sell, preventable churn, and avoidable escalations. A company admin struggling with manual payroll adjustments every cycle is a prime candidate for time tracking — but no one surfaces that signal. A company that’s added 15 employees in the last quarter might benefit from upgrading to PEO Plus — but the agent doesn’t see the growth trend.

The deeper problem: The data for proactive insights exists across multiple systems (product usage analytics, billing data, interaction history, Salesforce opportunity data). But it’s never been synthesized into agent-facing signals. This is a data science and product design problem, not a customer service problem — which is exactly why it sits with the ITO product team, not the CSO leadership.

Problem 6: The Two-Audience Paradox

The reality: The prompt asks about understanding "the profile of the person, AND their company." These are fundamentally different data sets with different structures. The company has a plan, a billing relationship, an employee roster, and an interaction history. The person has a role, personal details, their own interaction history, and (if they're an employee rather than an admin) their own benefits, pay, and tax information.

The cost: Today, these two profiles are likely stored and displayed separately. The agent has to mentally merge them. "Sarah is the admin for Acme Corp" requires pulling data from two different places and holding both in mind.

The deeper problem: The dashboard needs to present a nested information architecture: Person within Company. But the nesting goes both ways — the company context colors the person's profile (their plan determines what's available to them), and the person's history colors the company context (if 5 employees have called about the same benefits confusion, that's a company-level training gap, not an individual issue). The dashboard needs to enable both lenses.

Problem 7: The Scaling Threat

The reality: Justworks serves 10,000+ companies and is growing. They've added a Payroll-only product line, an EOR product, and international contractor payments. Each new product adds complexity for CSO. The current approach — experienced agents who know the systems and can navigate complexity through tribal knowledge — doesn't scale.

The cost: As Justworks grows, one of two things will happen: (a) they hire more agents, increasing cost but maintaining quality, or (b) quality degrades as agents are stretched thinner across more product lines. Neither is sustainable.

The deeper problem: Customer Central and the Health Dashboard aren't just about improving today's experience — they're about building the infrastructure that allows Justworks to 10x their customer base without 10x-ing their CSO headcount. The tooling IS the scaling strategy.

PART 4: THE ENCOUNTER — A MOMENT-BY-MOMENT BREAKDOWN

To really understand the problem, you need to walk through what a single encounter looks like today vs. what it should look like.

Today’s Encounter (Estimated Flow)

T+0s: Phone rings. Agent sees a phone number on their telephony system. **T+5s:** Agent answers: “Thank you for calling Justworks, how can I help you?” **T+10s:** Caller says: “Hi, this is Sarah from Acme Corp.” **T+15s:** Agent types “Acme Corp” into Salesforce. Waits for results. **T+25s:** Agent finds the account. Scans for basic info. Opens Zendesk in another tab. **T+35s:** Agent searches Zendesk for recent tickets. Sees 3 tickets from last month. **T+45s:** Agent clicks into the most recent ticket. Reads through it. **T+60s:** Sarah has been talking for 50 seconds, explaining her issue. Agent is half-listening while reading ticket history. **T+90s:** Agent opens the Justworks admin dashboard in a third tab to check payroll details. **T+120s:** Agent now has enough context to engage meaningfully. Two minutes have passed.

The customer’s experience: “I’ve been explaining this for two minutes and I’m not sure they’re even listening.”

The Ideal Encounter (With Customer Central)

T+0s: Phone rings. Caller ID matches to Sarah Chen, Admin, Acme Corp. Customer Central auto-populates. **T+3s:** Agent sees at a glance: Acme Corp, PEO Plus, 34 employees, current on billing, next payroll Feb 28. Sarah is the primary admin, has been with Justworks for 2 years. **T+5s:** Agent answers: “Hi Sarah, thanks for calling Justworks. How can I help?” **T+8s:** While Sarah starts talking, agent scans the interaction timeline: Sarah emailed 3 days ago about a payroll discrepancy for a new hire. Ticket is still open, assigned to another agent. **T+15s:** Agent says: “Sarah, I can see you reached out last week about the payroll issue with your new hire — are you calling to follow up on that?” **T+18s:** Sarah: “Yes! Exactly. No one got back to me.” **T+20s:** Agent clicks into the payroll details for the new hire in question. Sees the issue: the employee’s state tax withholding was set to the wrong state. **T+30s:** Agent explains the issue and either fixes it in-place or initiates the correction — all from the same screen.

The customer’s experience: “They knew who I was, they knew why I was calling, and they fixed it in 30 seconds. This is why I pay for Justworks.”

PART 5: SYNTHESIS — WHAT THE DASHBOARD MUST ENABLE

The dashboard isn’t a feature. It’s an answer to a question the agent asks themselves 50+ times per day:

> “What do I need to know about this person and their company RIGHT NOW to help them

> in the next 5 minutes?"

That question decomposes into 5 sub-questions, in order of urgency:

1. **WHO is this?** → Person identity, role, company affiliation (3 seconds)
2. **WHAT'S THE CONTEXT?** → Plan type, account status, recent interactions (10 seconds)
3. **WHY are they calling?** → Open issues, recent changes, pending items (15 seconds)
4. **WHAT CAN I DO?** → Available actions, relevant tools, knowledge resources (ongoing)
5. **WHAT SHOULD I RECOMMEND?** → Proactive signals, upsell opportunities, risk indicators (opportunistic)

Questions 1-3 are MVP. Question 4 is Phase 2. Question 5 is Phase 3.

The information hierarchy of the dashboard should mirror this exact sequence — top to bottom, left to right, primary to secondary. The agent's eyes should be able to scan in the same order that their brain needs the information.