



Customer Help & Support

March 2023

Purpose & aims.

1. Present findings from discovery work
2. Discuss potential solutions and their feasibility
3. Align on next steps

<https://dojo.tech/>



Delivering customer value.



Supporting customers

Outcome: Provide customers with a way to help themselves from within the Dojo for business app. Offering them the best channel for their query.

Measure: % of inbound contact that is categorised as Self Help



Empowering CSAs

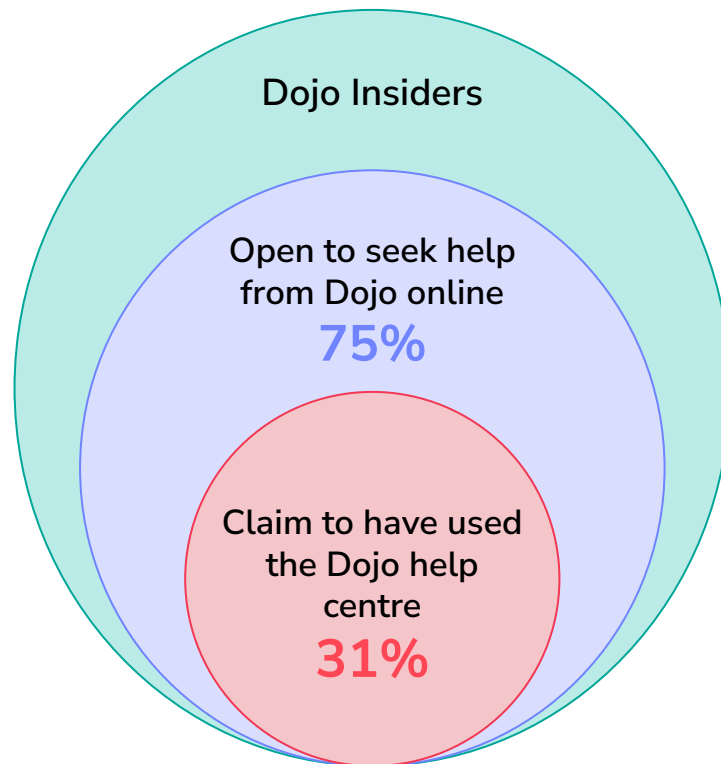
Outcome: Provide best in class tooling for advisors to solve customer problems efficiently.

Measure: Average handling time of tickets, Customer Satisfaction and advisor satisfaction

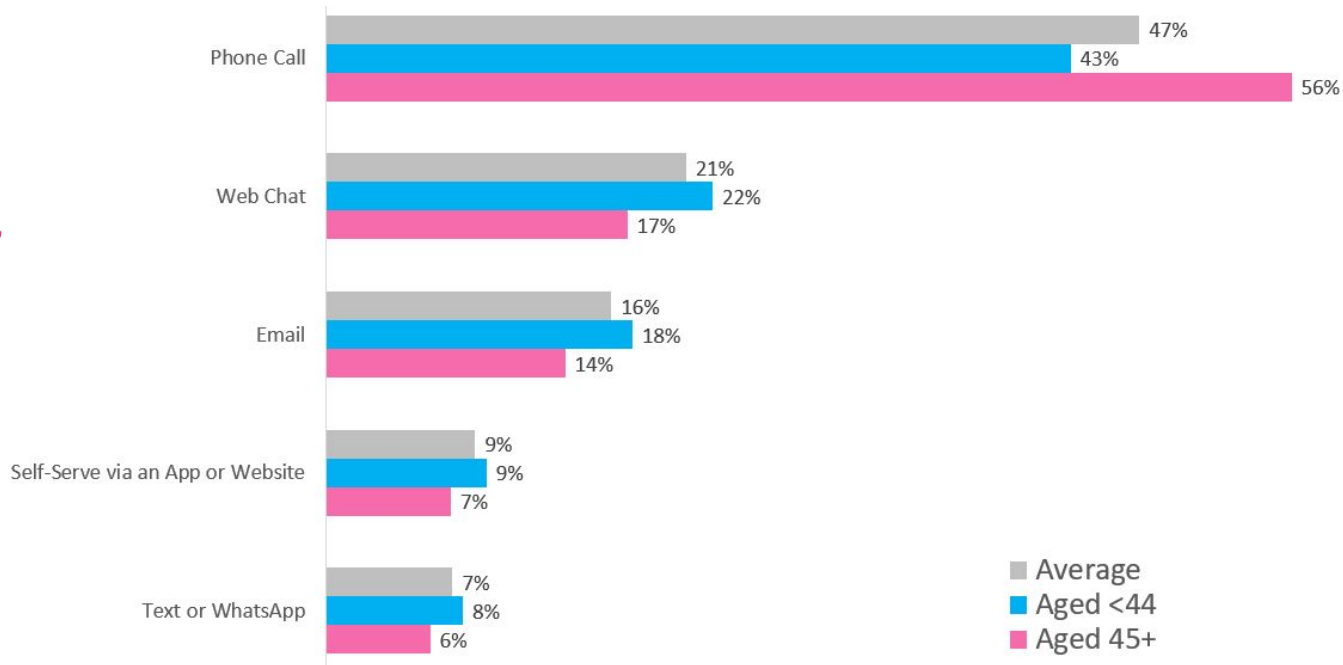
Current help offering

What we know

1. There is a **general lack of awareness** that the Dojo Help Centre exists
2. Customers understand a 'help centre' to be a **support desk** – internally we view it as an educational tool
3. Customers have a **preference to speak to someone** when they have a problem, but there is **low resistance to self-serve** & online solutions
4. A preference to self-serve or call support is based on the customer's **perception of the fastest solution**

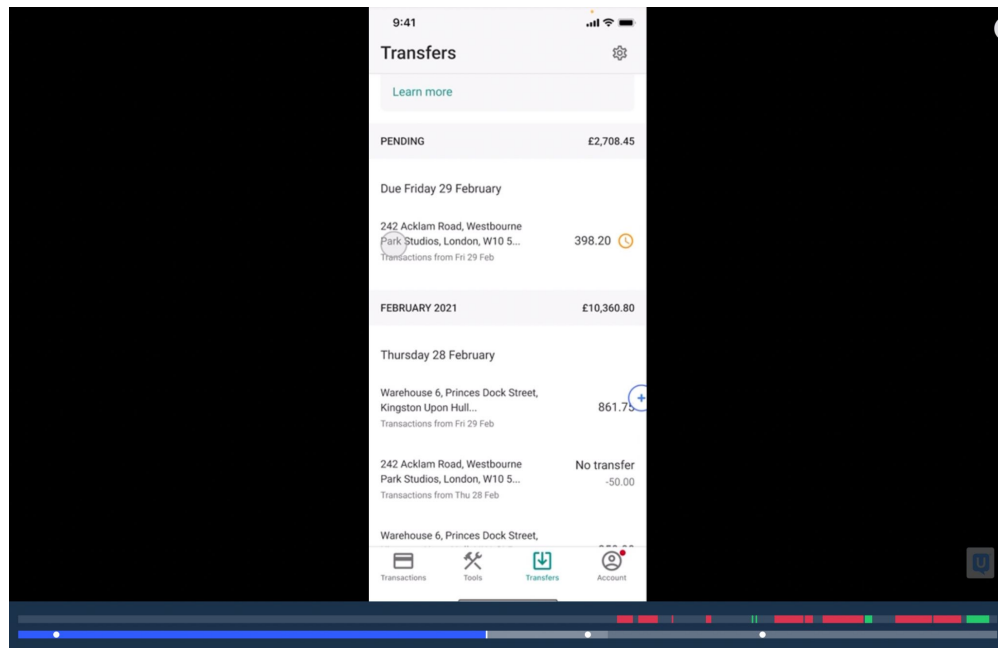


Quant research shows phone support the preferred channel

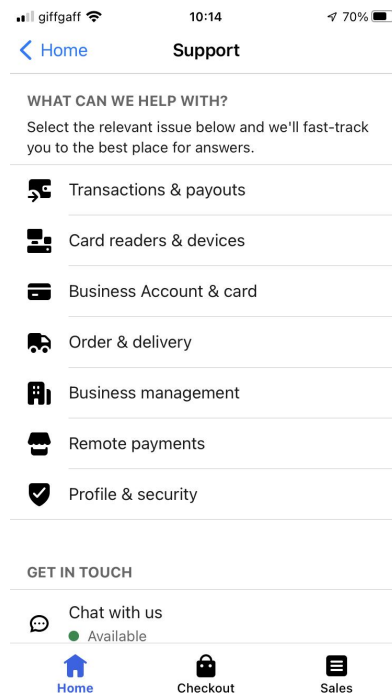
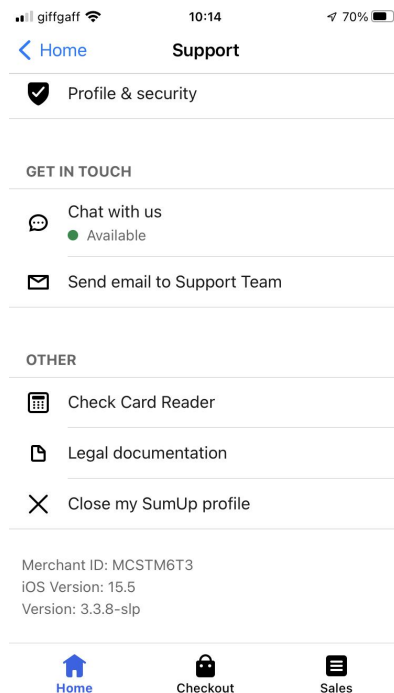
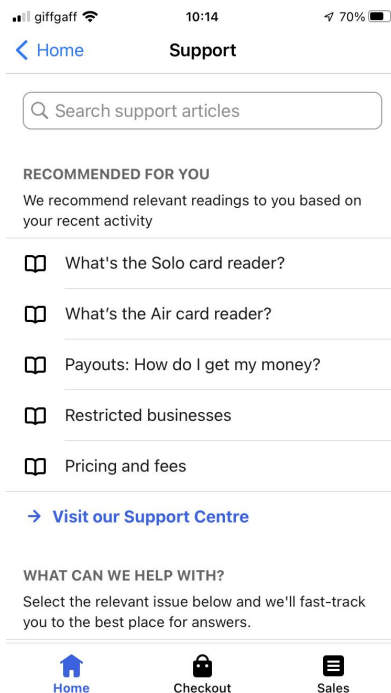
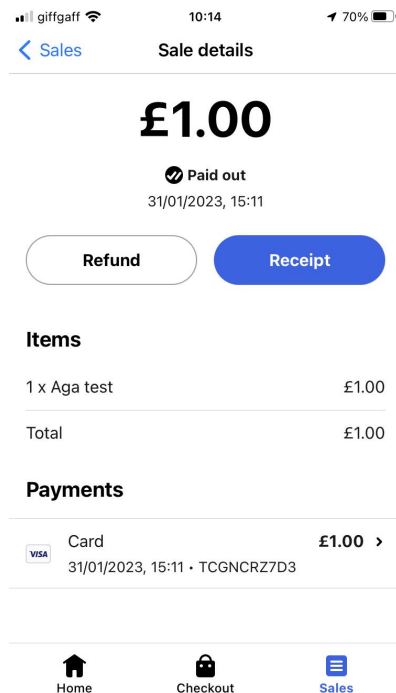


Participants struggled to find help

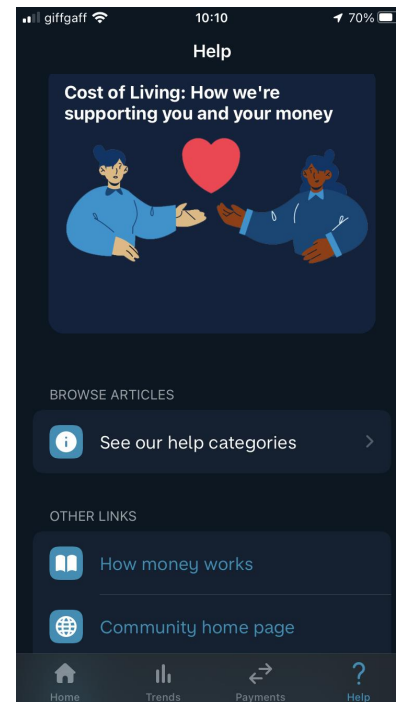
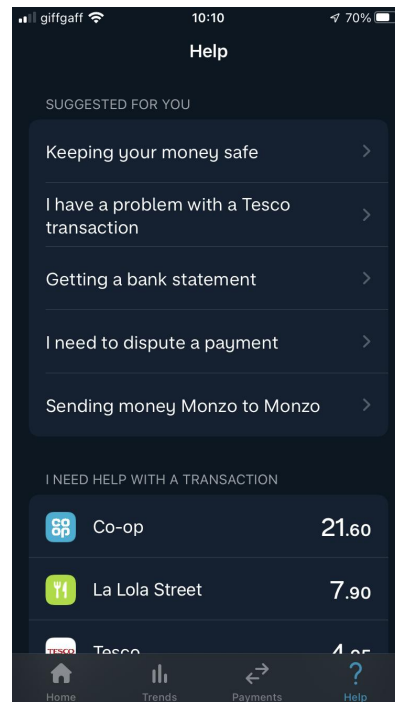
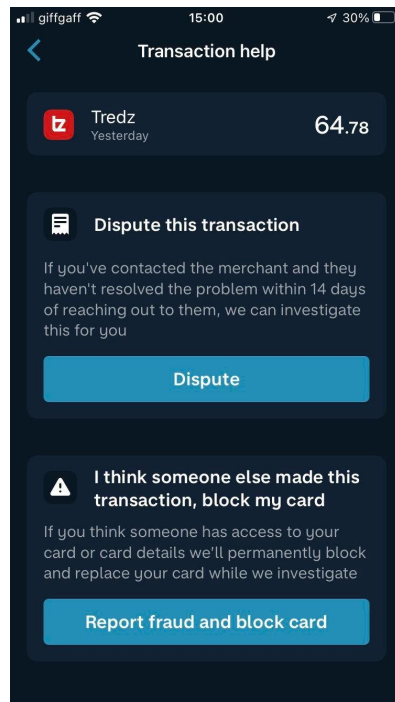
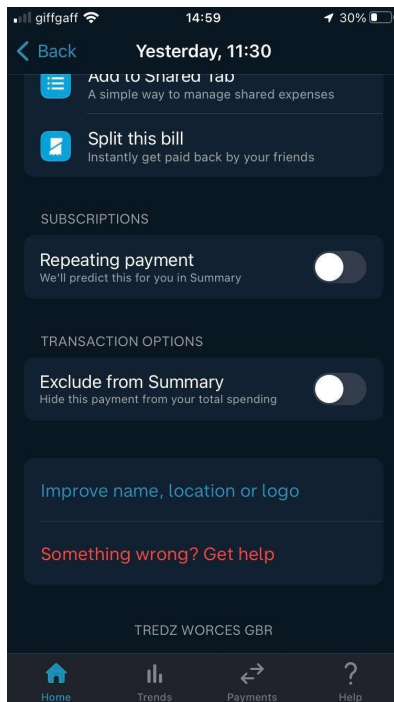
- Instructed 8 participants to find out information on the status of their transfer
- Participants primarily searched for help in the area they were having the problem
- Some went to the 'Updates' section for help
- No one easily navigated to help section



Support example: Square



Support example: Monzo

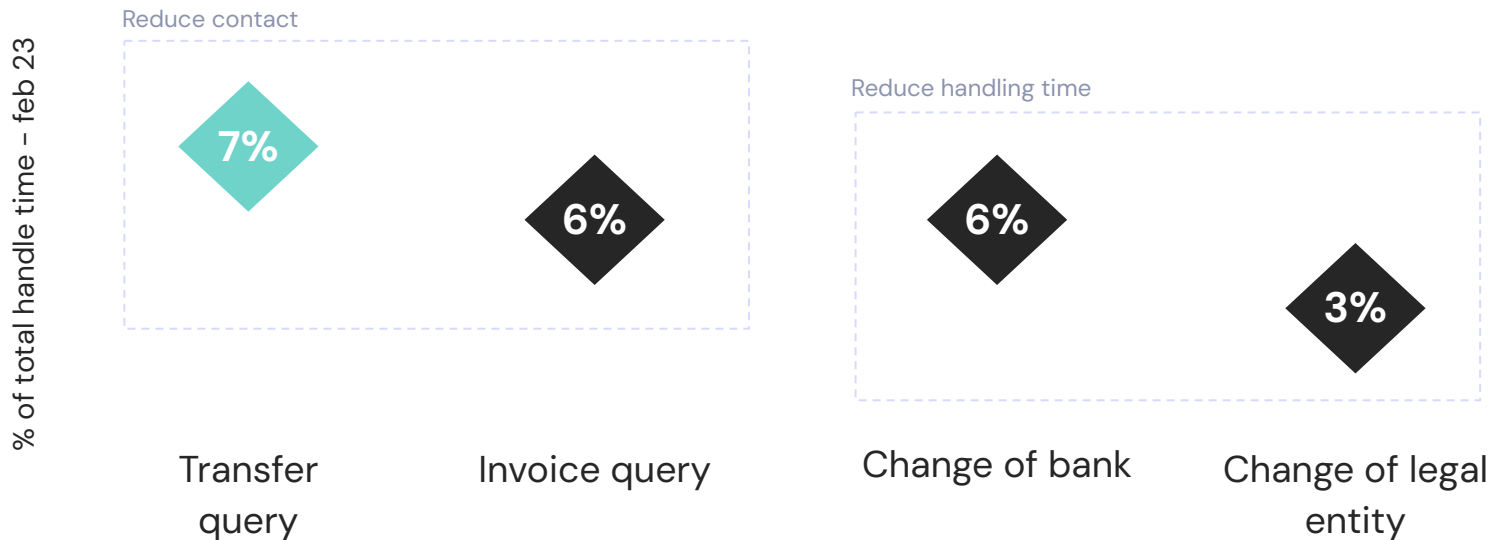




TL;DR

Customers are not aware of our help content, they look for a resolution in close proximity to their problem. They call us as it's perceived as the fastest way to resolve their query which in turn increases contact.

Top call drivers



Unpacking Transfer Query

Aka “Where’s my money?”

- The customer has been impacted by an incident
 - We could: Proactively tell customers about incidents
- The customer has business funding and Youlend haven't transferred funds yet
 - We could: Have greater transparency into YouLend processes
- The customer just wants to know where their funds are
 - We could: Leverage CARBS

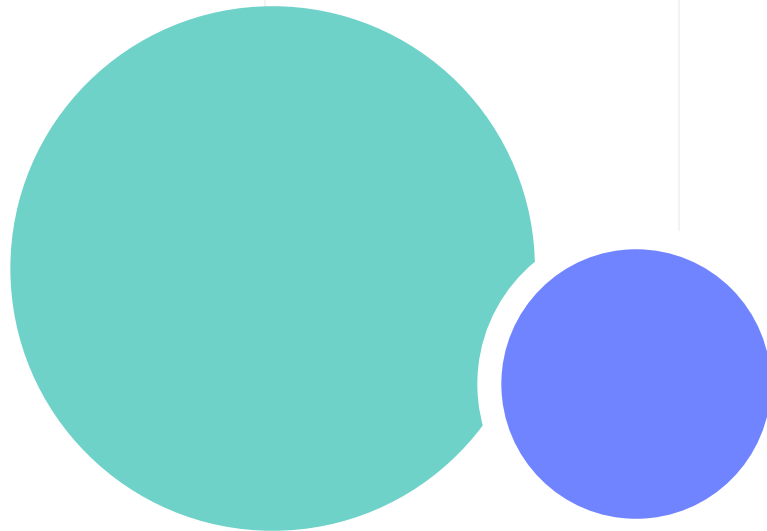
(We're already notifying the customer here but we could show more specific detail)

- Transfer suspended due to unpaid invoices
- Transfer suspended due to treasury (transfers bouncing from customers account)
- Transfer suspended due to investigation by risk

Low impact if we solve these problems in the app

8% of customers with transfer queries viewed the app prior to contacting us

Furthermore, 11% of customers with invoice queries viewed the app prior to contacting us



Where now?

Clear takeaway is to explore building out better visibility into these queries for CSA

Wider customer support options to discuss...

- Improve contextual help & testing the ability to call from the app [low impact]
- Build centralised native help center in the app [low impact]
- Build out chat functionality to surface relevant articles as a way to filter contact [Explore]
- Trigger push notifications with specific CTA for transfer suspended [Explore]
- Improve support with CLE & COB from customer & CSA side





Thanks.