

Project: Payroll Help Center Launch

Summary

The Payroll Help Center project started as a solution for providing clients with a self-service resource that would help them manage their payroll accounts independently and reduce their reliance on the Customer Support Team. The Help Center was created to house articles addressing the most common payroll questions clients have, empowering them to resolve account issues on their own.

The Payroll Help Center project involved the creation and launch of an initial set of 10 articles, which have since expanded to more than 80 articles. The Help Center has led to a significant reduction in client outreach, which resulted in both higher customer satisfaction thanks to receiving quick answers, and improved the internal Customer Support Team's experience by reducing repetitive support requests and overall volume, granting agents more time to focus on complex requests.

Project Background

Justworks Payroll is the newest product of the Justworks company. While the Justworks PEO product has a fully built-out Help Center, the Justworks Payroll product did not have any Help Center articles for its clients to reference for the first year of its existence, despite consistent client outreach about common challenges, such as scheduling payments, employee deductions, tax filings, and account updates. Many of these tasks required guidance from the Customer Support Team, which resulted in a high volume of inquiries and increased wait times for clients.

The lack of clear, accessible, and easily digestible resources resulted in clients relying heavily on the support Customer Support Team, leading to untenable levels of client outreaches and often the inefficient use of Customer Support Team members' time. To address these issues, the Payroll Help Center was created as a centralized resource to educate and equip clients to resolve payroll questions independently and reduce their need for direct support.

Primary Goals

1. **Reduce Client Outreach:** Decrease the volume of outreaches to the Customer Support Team by providing clients with an easy-to-navigate Help Center that addresses the most common payroll account questions.

2. **Educate and Empower Clients:** Enable clients to find answers and solve payroll issues on their own by offering clear, concise, and accessible articles.
 3. **Increase Support Team Efficiency:** Provide the Customer Support Team with a tool to redirect clients to relevant articles in an effort to reduce repetitive inquiries and boost support efficiency.
 4. **Improve Client Satisfaction:** Increase client satisfaction by offering 24/7 access to payroll-related resources, reducing the need to wait for direct assistance, and providing clients with the independence to resolve issues on their own.
 5. **Expand External-Facing Resources:** Continually update and expand the Help Center to cover a broader range of topics and curate content based on client feedback.
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Method

This project was divided into the following key phases:

1. Research and Development

- **Client Interviews:** The project leader met with clients to identify the most frequent questions and common pain points clients experienced when setting up and managing their payroll accounts.
- **Support Team Insights:** Customer Support representatives were interviewed to gather insights on the most common issues and the types of inquiries they received most often. This input guided the structure and content of the Help Center articles.

2. Content Creation

- **Article Copy:** The project leader created accurate, detailed, and easy-to-understand article text based on the key payroll topics identified by customers. These included articles on how to complete the onboarding process, schedule off-cycle payments, manage employee deductions, and add members to the platform.
- **SEO Optimization:** To ensure clients could find answers easily, articles were optimized for search, using relevant keywords that clients were most likely to search for when facing payroll-related challenges.

3. Cross-Team Collaboration

- **Internal Meetings:** The project leader met with multiple internal teams, including Customer Support, Legal, and Design, to ensure that the article copy was clear, correct, and able to be used as an external resource.
- **Article Formatting:** The project leader coordinated with the Design Team to format the text in a way that focused on simplicity and clarity, featuring step-by-step instructions and screenshots.

4. Team Communication and Help Center Launch

- **Initial Article Launch:** The [Payroll Help Center](#) launched with 10 core articles covering essential payroll topics. These were selected based on the frequency of inquiries and the importance of the tasks.
- **Internal Training:** The Customer Support Team was trained on how to use the Help Center efficiently by working the Help Center links into their existing client macros. The team was also encouraged to guide clients to relevant articles for common issues to cut down on repeat outreaches.

5. Monitoring and Optimization

- **Client Feedback:** Clients were encouraged to provide feedback on articles, helping the team identify gaps in the content or areas where further clarification was needed.
 - **Continuous Expansion:** Following the initial launch, the Help Center content continued to grow, with over 70 additional articles added based on client feedback, common queries, and seasonal needs, such as year-end payroll processing, tax filings, etc.
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Results

Implementing the Payroll Help Center led to several key improvements across client engagement, operational efficiency, and overall client satisfaction:

1. **Reduced Client Outreach:**
 - Client outreaches to the Customer Support Team dropped significantly after the Payroll Help Center launch, as clients were able to find solutions to their questions through the Help Center.
 - The most frequently accessed articles included those related to onboarding onto the platform, providing payroll history reports, and scheduling one-time payments.
 2. **Improved Support Team Efficiency:**
 - The Customer Support Team experienced shorter resolution times for simple client questions, as agents could quickly direct clients to the applicable Help Center article, eliminating the need for extended troubleshooting or explanations.
 - The Help Center's 24/7 availability allowed clients to find answers at their convenience, freeing up Support Team members for more complex tasks and improving overall customer satisfaction with the product.
 3. **Content Expansion:**
 - Over 70 additional articles were added to the Help Center after the initial launch based on ongoing client feedback and emerging payroll needs like new feature guides, hourly employee support, and state tax account setup instructions.
 - The number of clients using the Help Center grew steadily, with **45% of clients** using it for self-service in the first six months.
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Conclusion

The Payroll Help Center project successfully equipped clients to manage their payroll accounts independently and reduced the volume of client inquiries to the Customer Support Team. By providing clients with clear, accessible resources and tools, Justworks Payroll has been able to streamline the support process and enhance the overall client experience.

The Payroll Help Center has become a critical tool for both clients and internal teams, contributing to the long-term goal of offering customers seamless, self-service solutions. The initial success of the Payroll Help Center has prompted plans of continuing to expand the Help Center by adding new articles and resources based on client needs.