

# Reducing Support Ticket Volume for a B2B Project Management SaaS

In-Product Guidance Strategy



Focus Area

Product Operations



Target Audience

SMB &amp; Mid-Market



Approach

Data-Driven UX

# Case Study Overview

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01

## Context & Problem

Support ticket analysis revealing 35–40% how-to questions, impacting costs and user experience for SMB project management platform

02

## Objectives & Targets

Reduce how-to tickets by 25%, improve first-time user experience, and free support capacity for complex issues

03

## Analytical Approach

Ticket categorization framework, root cause analysis, and data-driven prioritization of high-impact workflows

04

## Solution Design

Guided project setup, clearer permissions UX, and opinionated reporting templates with user stories

05

## Impact & Key Learnings

Success metrics, product operations skills applied, and insights on translating support data into product backlog

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# 01

## Context & Problem Definition

Understanding the support burden and user friction patterns in a mature  
B2B project management platform

# Product Context & User Base



## Product Maturity

Established B2B project management SaaS with comprehensive feature set for project tracking, task management, and team collaboration



## Target Users

SMB and mid-market teams across various industries seeking structured project management and reporting capabilities



## Support Challenge

High volume of repetitive how-to tickets from new and infrequent users struggling with core workflows

## Role & Perspective

This case study approaches the problem from a Product Operations / Product Owner perspective, combining data analysis with UX improvements to address systemic support issues.



Data Analysis



User Experience



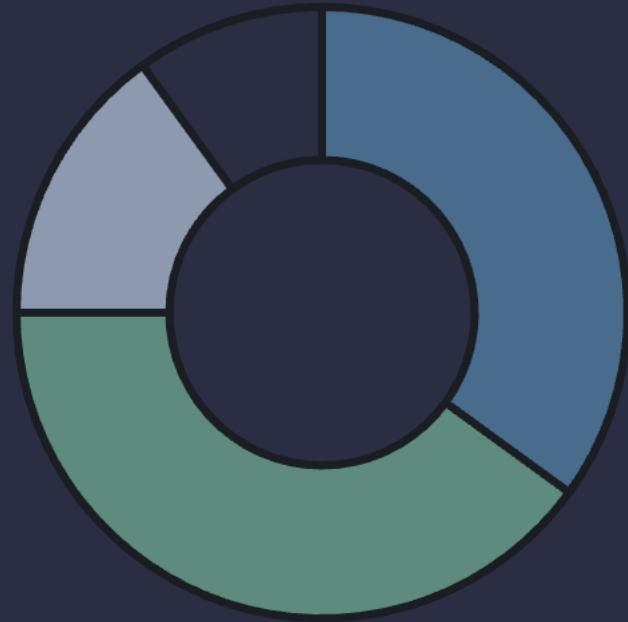
Process Optimization



Impact Metrics

# Support Ticket Analysis: The Problem

## Ticket Volume Breakdown



How-To Questions (35%)

Bug Reports (40%)

Feature Requests (15%)

Other (10%)

## Key Finding

35-40%

Of total support tickets were "how-to" or configuration questions, not actual bugs or technical issues. This represents a significant opportunity for product-led solutions.

## Top 3 Use Cases (from 1,000 sample tickets)

180

### Project Setup

"How do I set up my first project/board?"

130

### Permissions

"Why can't X user see Y board/task?"

90

### Reporting

"How do I create a report for my manager?"

# User Segmentation & Pain Points



## New Users

<30 days since signup

Overwhelmed by feature richness, need guidance for basic setup, unfamiliar with terminology and workflows



## Infrequent Users

Periodic platform usage

Forget workflows between sessions, struggle with complex configurations, need rediscovery of features



## Active Users

Daily/weekly usage patterns

Comfortable with core features, occasionally need advanced help, become internal experts



## Project/Board Setup

Users dropped into blank UI without guidance

- Unclear project templates
- Complex board configuration
- Missing onboarding flow



## Permissions & Access

Role-based access unclear

- Cryptic error messages
- Complex permission matrices
- No visibility explanations



## Reporting & Dashboards

Too flexible, not opinionated enough

- Overwhelming filter options
- No starter templates
- Steep learning curve

# Business Impact Assessment



## Increasing Support Costs

Repetitive how-to tickets consume agent time that could be allocated to complex issues

**Impact:** Higher operational costs, agent burnout, reduced scalability



## Slow Response Times

High volume of basic questions delays response for actual defects and critical issues

**Impact:** Customer frustration, escalations, SLA breaches



## User Frustration

Users wait for answers to basic questions, creating poor first impression and adoption barriers

**Impact:** Churn risk, negative reviews, low NPS scores

## Cascade Effect Across Operations



### Support Team

Overwhelmed with repetitive tickets



### Product Team

Poor data on real user issues



### Engineering

Delayed bug fixes and features



### End Users

Poor experience and churn

# 02

## Objective & Success Targets

Defining measurable outcomes for product and process improvements

# Project Objectives

01

## Reduce Repetitive How-To Tickets

Target a 25% reduction in tickets across 2-3 core workflows (project setup, permissions, reporting) within 3-6 months through improved in-product guidance.

⌚ Focus: Project Setup, Permissions, Reporting

02

## Improve First-Time User Experience

Accelerate time-to-first-value by providing guided flows, improved empty states, and self-service capabilities that enable users to start without documentation.

⌚ Metric: Time to first project created

03

## Free Support Capacity for Complex Issues

By reducing repetitive how-to tickets, reallocate support resources to handle actual defects, critical issues, and high-touch customer success activities that require human expertise.

Current State

-400 how-to tickets/month

Target Reduction

-25% = 300 tickets/month

Capacity Freed

100 tickets/month

# Success Metrics & Targets

## Primary Success Metric

25%

Reduction in How-To Tickets

Target reduction in selected categories over 3-6 months, translating to 10-15% reduction in total ticket volume.

Timeline: Baseline → 3 months → 6 months



### Ticket Volume by Category

Track project setup, permissions, reporting tickets



### Time to First Value

Time from signup to first project created



### Guided Flow Completion

Click-through and completion rates



### CSAT / NPS

Onboarding-related support satisfaction

## Success Measurement Timeline

M0

Baseline

Current metrics established

M3

First Measure

Initial impact assessment

M6

Target Achieved

25% reduction expected

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# 03

## Analytical Approach

Data-driven analysis and root cause investigation through systematic ticket categorization

# Ticket Categorization Framework

To systematically analyze support patterns, a four-dimensional taxonomy was developed to enable data-driven insights and targeted improvements.

 **Category**

Functional area of the issue

Project Setup   Permissions   Reporting   Integrations   Other

 **Type**

Nature of the request

Bug   How-To   Feature Request

 **User Segment**

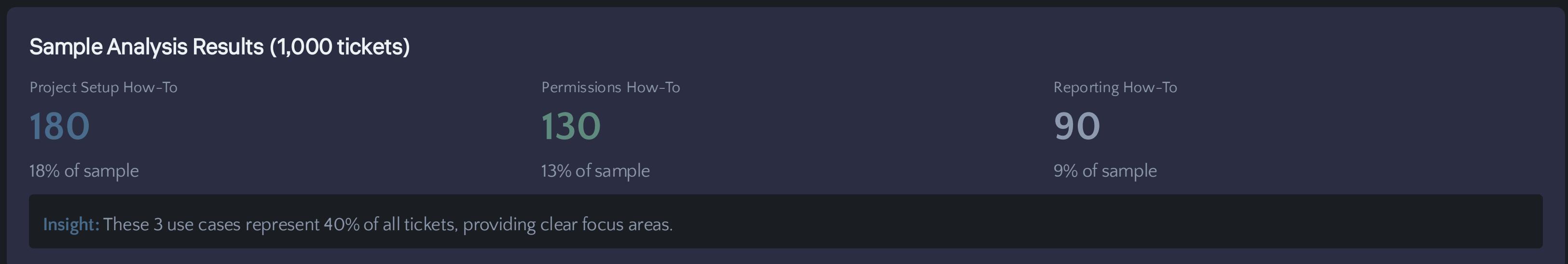
User experience level

New (<30d)   Active   Infrequent

 **Channel**

Support contact method

Email   In-app   Chat



# Root Cause Analysis

Based on ticket patterns and common SaaS UX principles, three interconnected root causes were identified as primary drivers of support volume.



## Onboarding Gaps

**Issue:** New users dropped into a blank UI with minimal guidance, faced with overwhelming feature richness without clear starting point.

**Symptom**

"How do I set up my first project?"

**Cause**

No guided onboarding flow

**Result**

Users contact support immediately



## Permissions Complexity

**Issue:** Role-based access control is unclear with cryptic error messages and no clear explanation of visibility rules.

**Symptom**

"Why can't X user see Y board?"

**Cause**

Complex permission matrices

**Result**

Admins spend time troubleshooting



## Reporting UX Issues

**Issue:** Reporting module is too flexible without providing opinionated templates for common use cases.

**Symptom**

"How do I create a basic report?"

**Cause**

No starter templates or guidance

**Result**

Users get lost in filter options



# 04

## Solution Design

Product improvements and in-product guidance strategy targeting identified root causes

# Guided Project Setup

## Guided Setup Wizard

Interactive flow when creating first project to reduce cognitive load.

- ✓ **Template Selection:** Choose from Kanban, Scrum, or simple task list
- ✓ **Team Invitations:** Built-in flow to add teammates
- ✓ **Basic Configuration:** Set up custom statuses and priorities

## Empty State Improvements

Transform blank project pages into helpful starting points.

- ✓ **Contextual Explanation:** Short description of what to do next
- ✓ **Primary CTA:** "Create your first task" button
- ✓ **Walkthrough Link:** 1-minute getting started video

## Sample User Story

**As a new workspace owner,**

I want a guided flow to set up my first project so that I can start using the tool without reading long documentation.

## Acceptance Criteria

- 1 When a user creates their first project, a **3-5 step guided flow** appears automatically
- 2 User can select from **at least 3 templates** (Kanban, Scrum, Simple)
- 3 User can **exit the flow** at any time and still end up with a working basic project
- 4 Completion of flow creates **pre-configured project** ready for immediate use

# Clearer Permissions & Visibility Rules

## Human-Readable Explanations

When users encounter access restrictions, provide clear, plain-language explanations instead of cryptic error messages.

### Before

- ✗ "Error 403: Insufficient permissions"

### After

- ✓ "You need 'Project Admin' role to view this board. Contact your workspace admin."

## In-Context Help Links

Add contextual "Why can't I see this?" links that open short explanations of required roles and permissions.

### Contextual Help Modal

Shows:

- Required permission level
- Current user's roles
- Who to contact for access

## Sample User Story

### User Story

As a project admin, I want to easily understand why a teammate cannot see a specific board so that I can fix permissions without contacting support.

### Acceptance Criteria

- ✓ Clear error messages explain access issues
- ✓ In-context help link shows required permissions
- ✓ Users understand next steps without support

# Opinionated Reporting Templates

## Starter Report Templates

Provide 3-4 pre-configured templates for the most common reporting needs.

### Overview for Managers

High-level project status, timeline, and blockers

### Team Workload

Task distribution, capacity planning, and utilization

### Sprint Summary

Velocity, completed stories, and retrospective data

## Improved Creation Flow

Change the flow from configuration-first to intent-first.

- 1 Ask: "What do you want to see?"
- 2 Propose relevant template with pre-configured filters
- 3 Allow customization but provide working defaults

## Sample User Story

As a team lead,

I want a one-click "Manager overview" dashboard so that I can quickly see status without configuring complex reports.

## Acceptance Criteria

 User can create report in **one click** from template gallery

 Template includes **pre-configured filters** for common use cases

 User can **customize** after creation if needed

 Template produces **immediately useful** output

# User Stories & Acceptance Criteria

Translating insights into actionable development work through detailed user stories and measurable acceptance criteria, demonstrating the Product Owner approach to backlog management.

## User Story Template

As a [user type], I want [goal] so that [benefit].

### Key Components

- User persona and role
- Clear action or feature
- Stated value or outcome
- Measurable success criteria

## Acceptance Criteria

### Characteristics

- Specific and measurable
- Testable and verifiable
- User-focused language
- Defines done state

### Format

Given [context], when [action], then [expected outcome]

## Example: Guided Project Setup User Story

### User Story

As a new workspace owner, I want a guided flow to set up my first project so that I can start using the tool without reading long documentation.

### Business Value

Reduces support tickets, improves activation rate, increases user satisfaction

### Acceptance Criteria

- Given new user, when creating first project, then guided flow appears automatically
- Given guided flow, when user selects template, then project is pre-configured accordingly
- Given guided flow, when user exits, then project is still created with basic settings
- Given completion, when user finishes flow, then they land in ready-to-use project

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# 05

## Impact & Key Learnings

Measuring success and product operations insights from data-driven analysis

# Success Metrics & Projected Impact

## Primary KPIs

How-To Ticket Volume

-25%

Project setup, permissions, reporting

Time to First Value

-30%

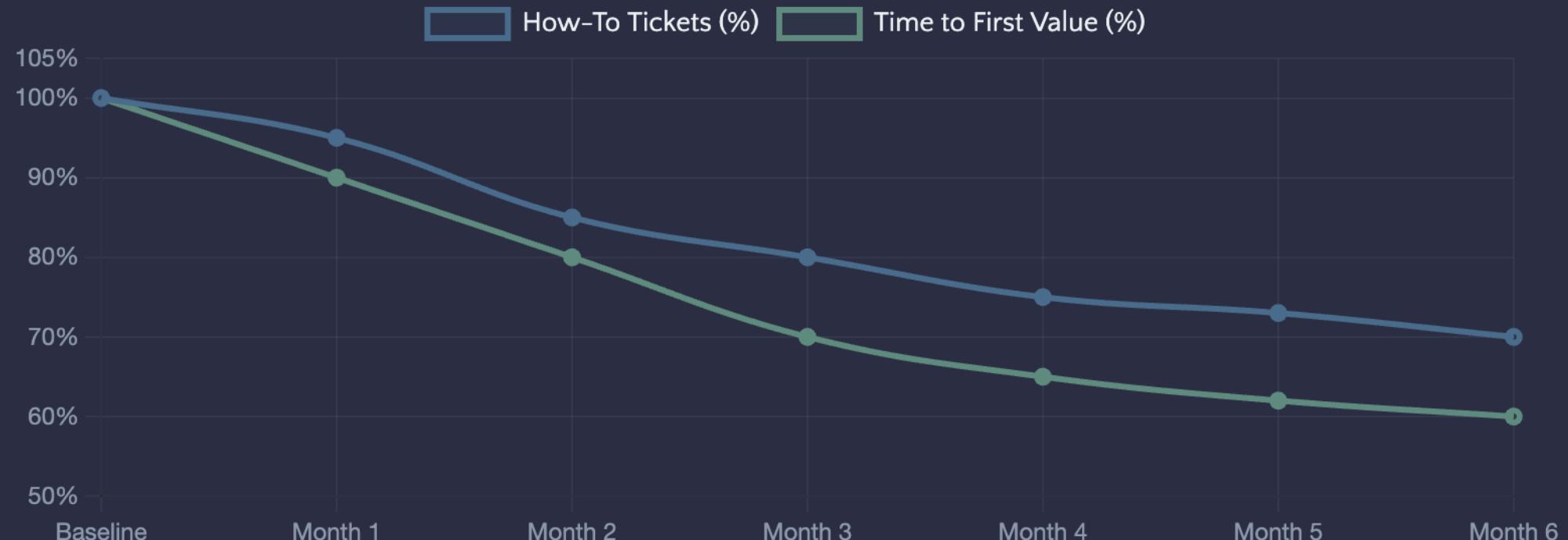
Time to first project created

Guided Flow Completion

60%+

New users completing setup wizard

## Projected Impact Timeline



### \$ Support Cost Reduction

25% fewer how-to tickets = significant agent time savings

### 😊 User Satisfaction

Faster onboarding and less frustration improve CSAT/NPS

### 🔑 Product Activation

Guided setup increases users reaching "aha" moment

### 👥 Support Team Focus

Agents handle complex issues requiring human expertise

## Professional Capabilities

# Skills & Tools Applied



## Product Thinking

Applied B2B SaaS product principles to identify high-impact improvements

- ✓ User-centered design
- ✓ Value vs effort prioritization
- ✓ Iterative improvement strategy



## Data Analysis

Analyzed support ticket patterns to identify root causes and quantify impact

- ✓ Ticket categorization taxonomy
- ✓ Quantitative analysis (1,000 sample)
- ✓ Impact measurement framework



## Stakeholder Empathy

Balanced needs of support, product, engineering, and end users

- ✓ Support team capacity constraints
- ✓ Engineering resource limitations
- ✓ End user experience optimization

## User Story Writing

Translated insights into actionable user stories with clear acceptance criteria

- ✓ Given/when/then format for clarity

## UX Pattern Knowledge

Applied established UX patterns: empty states, guided tours, templates

- ✓ Progressive disclosure and opinionated defaults

# Key Learnings

01

## Support Data → Product Backlog

How to translate support data into a prioritized product backlog by identifying patterns, quantifying impact, and focusing on high-volume, high-friction areas.

**Key Insight**

Categorization enables pattern recognition

**Application**

Focus on 40% of tickets in 3 areas

02

## UX Improvements Reduce Support Volume

How UX improvements (not just documentation) can reduce support volume by designing intuitive interfaces and guided flows.

**Key Insight**

Prevention is better than cure

**Application**

Guided setup replaces documentation

03

## Impact Metrics Link to KPIs

How to define impact metrics linked to support and product KPIs by setting measurable targets and tracking outcomes.

**Key Insight**

Metrics must be actionable

**Application**

25% reduction target drives decisions

# Product Operations Impact

How data-driven analysis and cross-functional collaboration create measurable business value



## 25% Reduction in Support Tickets

Through systematic UX improvements



## Enhanced User Experience

Faster onboarding and reduced friction



## Operational Efficiency

Reallocated support capacity for complex issues