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# Build it, ship it, support it: Customer service for a digital-first world



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Alex Zhitnitsky, Product Marketing Senior Team Lead, Atlassian



How many of you **know** that you can use **Jira Service Management** for **customer service**?



And how many of you are **using**  
**Jira Service Management** for  
**customer service**?

**1 IN 4**

customers use

⚡ **Jira Service Management**

for external support



Delivering a great customer  
experience is non-negotiable.

# GREATEST CHALLENGES SERVICE ORGANIZATIONS EXPECT TO FACE



Moving fast enough to keep up with the way customers want to experience support



Cost reduction/ revenue increase



Scaling of support as the business grows



Convincing management to accept the level of investment necessary to make customer service a competitive differentiator



Lack of skilled resources needed to keep pace with technology changes and operational sustainability



Deliver exceptional,  
**digital-first** customer service

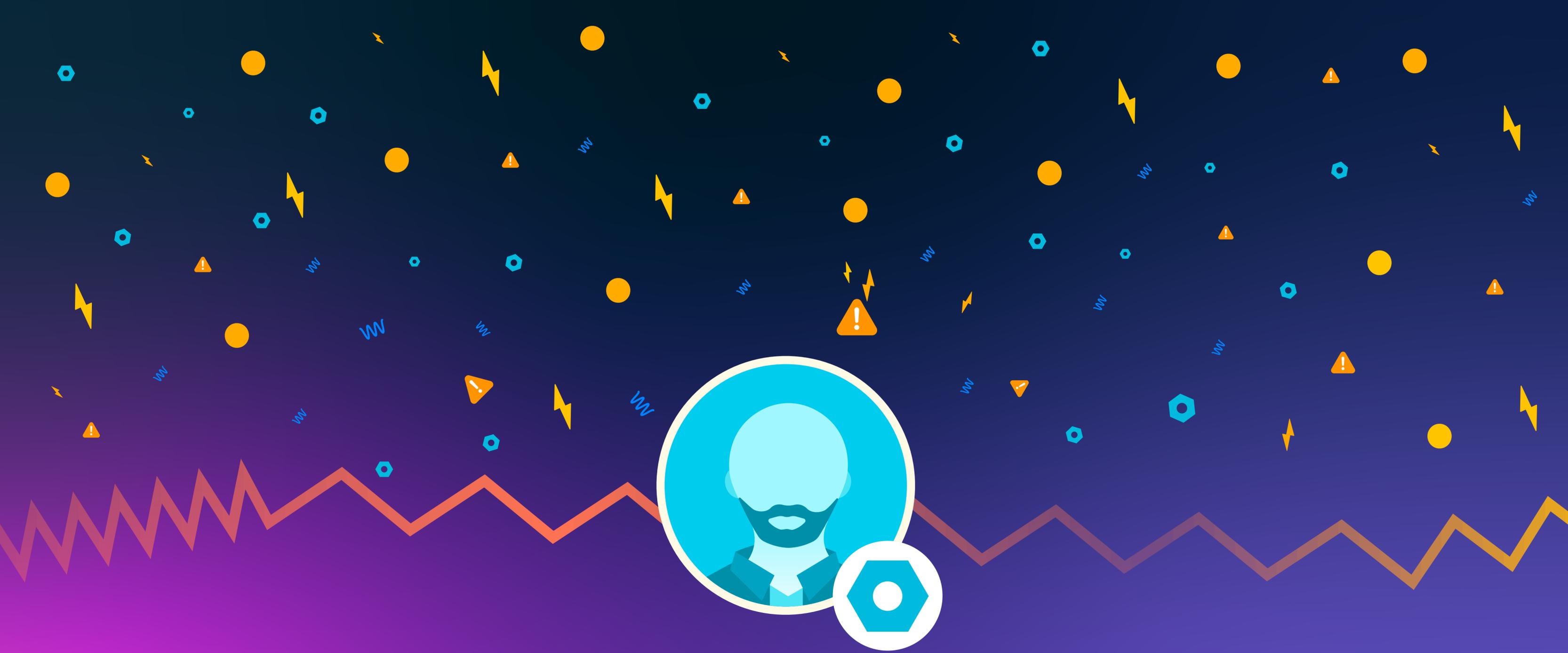
# Innovate *fasten*



*Escalations would  
often have to  
bubble up all the  
way to the CTO.*

---

Fiona Gallagher | Global head of product support, Iress



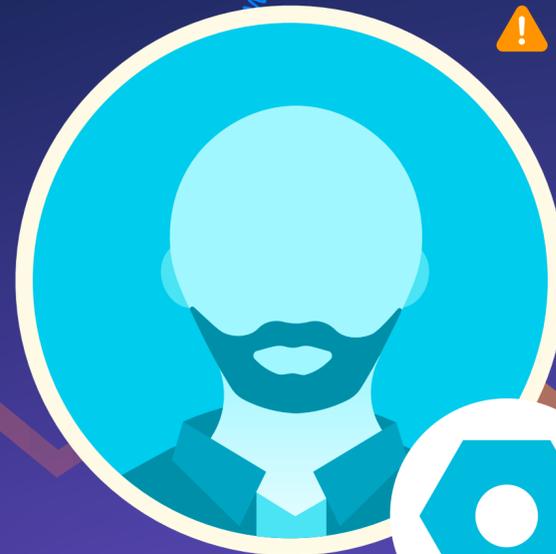
Customer support



Development



Operations



Customer support



# Build it



## Development

Solve meaningful problems by bringing customer insights directly into your work

# Ship it



## Operations

Correlate incidents with support cases to see the impact of each release

# Support it



## Customer support

Provide seamless customer service and create a feedback loop with development

# Closing the loop

with

⚡ Jira Service Management



Value-enhancing service experiences have a massive impact on customer loyalty behaviors.



Probability of being retained



Probability of spending more money



Probability of sharing positive word of mouth

A customer's journey

IRESS + ATlassian



“The synergies of having everyone on one platform has been a blessing.”

FIONA GALLAGHER, GLOBAL HEAD OF CUSTOMER SUPPORT

↓ **20%**

Fewer requests thanks  
to self-serve

↑ **46%**

Support cases handled  
within 24 hours

⚡ Jira Service Management



Meet Jane

**AN IRESS CUSTOMER**



## Welcome to Iress Connect - Search our knowledge base here

Find help and services



### Welcome to Iress Connect

You can use this site to connect with multiple teams from Iress to request help, change or add a license, request a...

#### Featured portals



#### Service Desk - Issues

Something not working? Raise a request for Iress to help you here



#### Change Requests

Make a change in your existing system - Raise your request here



#### Licence Requests

Iress software licence: new; change access for an existing licence; delete a licence; or billing query.

#### Access to Iress Connect

I have a colleague who needs access to Iress Connect. Raise a request on their behalf here.



Iress Connect / Service Desk - Issues

## Service Desk - Issues

Something not working? Raise a request for Iress to help you here

What can we help you with?



I have an Xplan issue



Raise this request on behalf of\*



Fiona Gallagher (fiona.gallagher@iress.com)



Summary\*

font

Suggested articles



XPLAN | PORTFOLIO | CHANGE REPORT **FONT** TYPE OR **FONT** SIZE

How do i change the font size used in Portfolio reports ?



XPLAN | CLIENT FOCUS | CUSTOM **FONT**S

Admin > System Settings > Custom Fonts



XPLAN| CLIENT FOCUS| HOW DOES EMAIL TO SMS WORK?

As you are using email to SMS the SMS recipient will receive the email as plain text. What that means is that any formatting, font sizes, colours etc that are in the email will not be received by the end user, all they will see is basic text like when you receive a normal SMS. Keep this in...



Meet Ed

**AN IRESS SUPPORT AGENT**

Projects / Iress Service Desk / ISD-27818

[Redacted]

- Investigate
- Link issue
- Add form
- Add PIR
- ...

General Unused Fields

**HP** Hercules Du Preez raised this request via Jira [Hide details](#)  
[View request in portal](#)

Description  
[Redacted]

Similar requests ...

Activity

Show: All **Comments** History Work log Approvals Newest first

**FG** Add internal note / Reply to customer / Inform stakeholders

Pro tip: press M to comment

**HP** Hercules Du Preez March 20, 2023 at 3:38 AM  
[Redacted]  
Edit · Delete ·

**AJ** Automation for Jira March 20, 2023 at 3:37 AM  
Thank you for raising your query with Iress support, your ticket has been triaged and placed in our queue. Please continue to monitor your ticket and the current status in Iress Connect.

🔊 👁 2 👍 🔄 ⋮

**Resolved** ✓ Done ⚡ Actions

Details ^

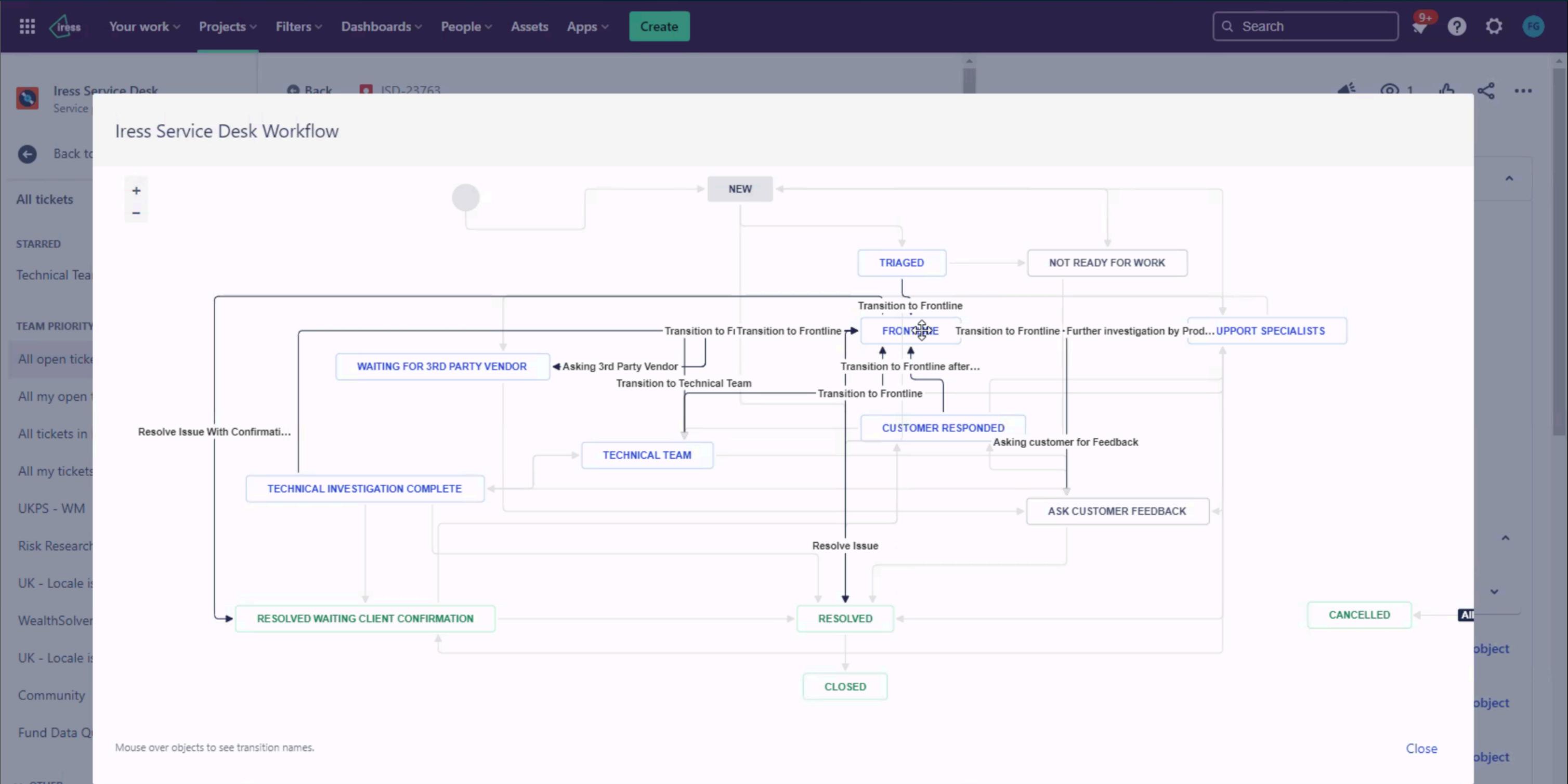
Priority 4 - Low  
Assignee **HP** Hercules Du Preez [Assign to me](#)  
Reporter **HP** Hercules Du Preez  
Request participants None  
Owner **HP** Hercules Du Preez  
Locale AU  
Request Type I have an Xplan issue

Organization  
Iress Internal - AU

Solution  
Investment Management

Product  
Fund Data

Product Component

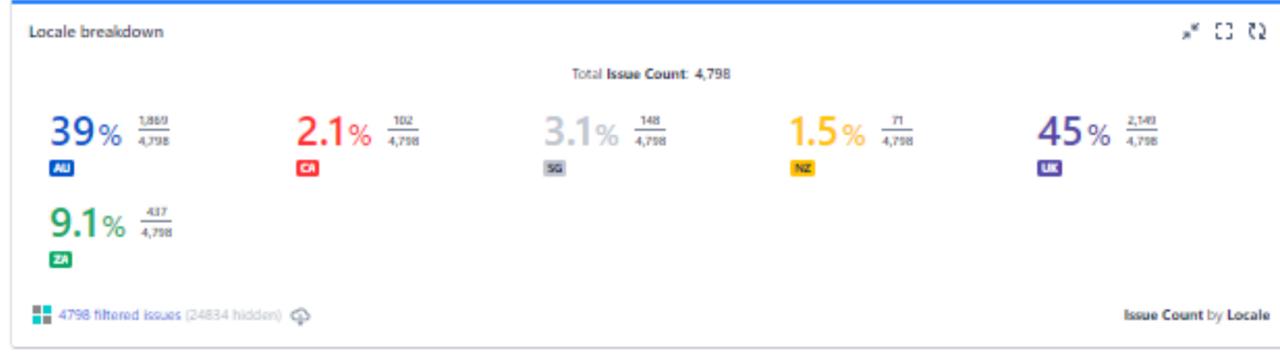
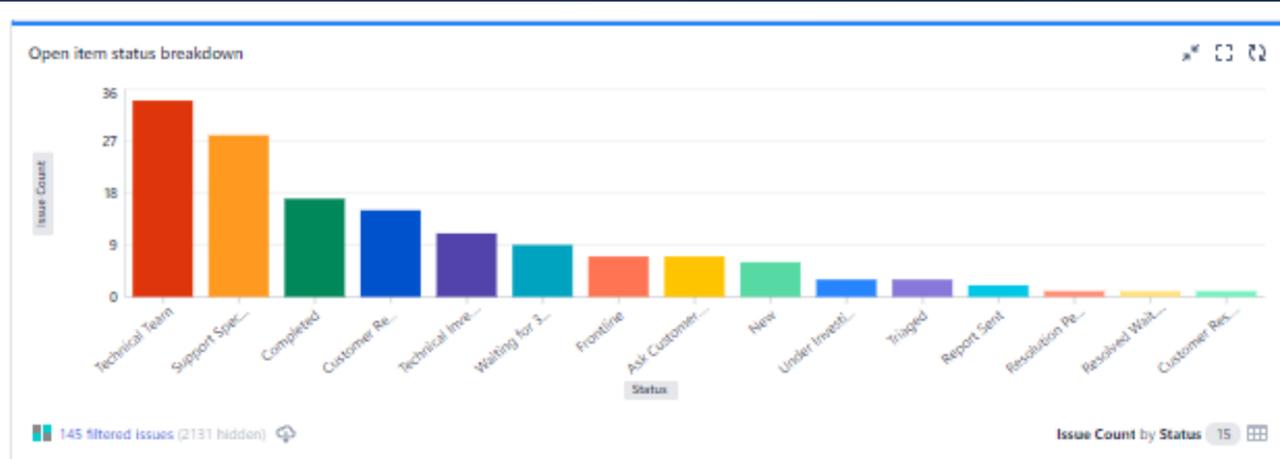




Development



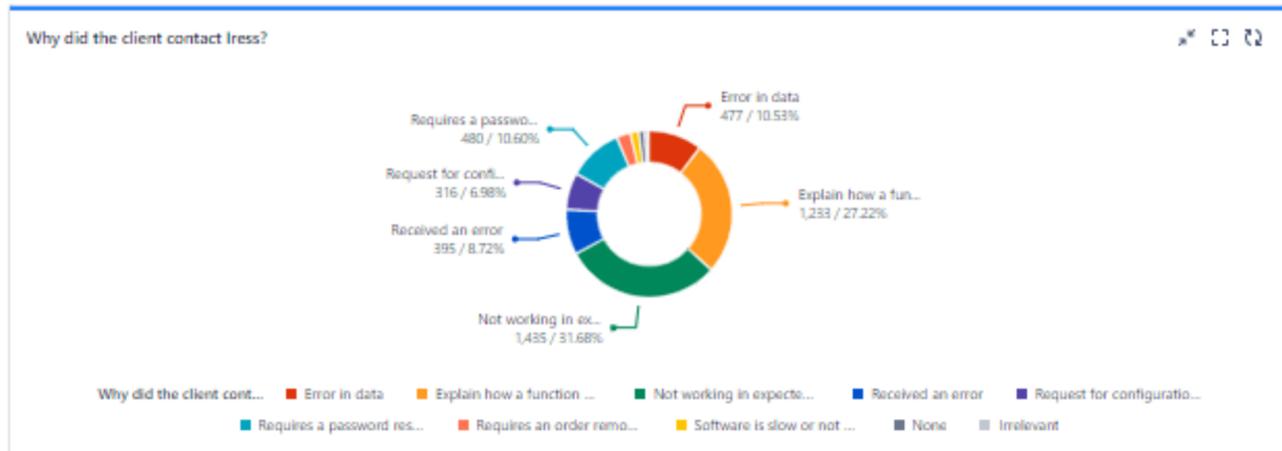
Customer support

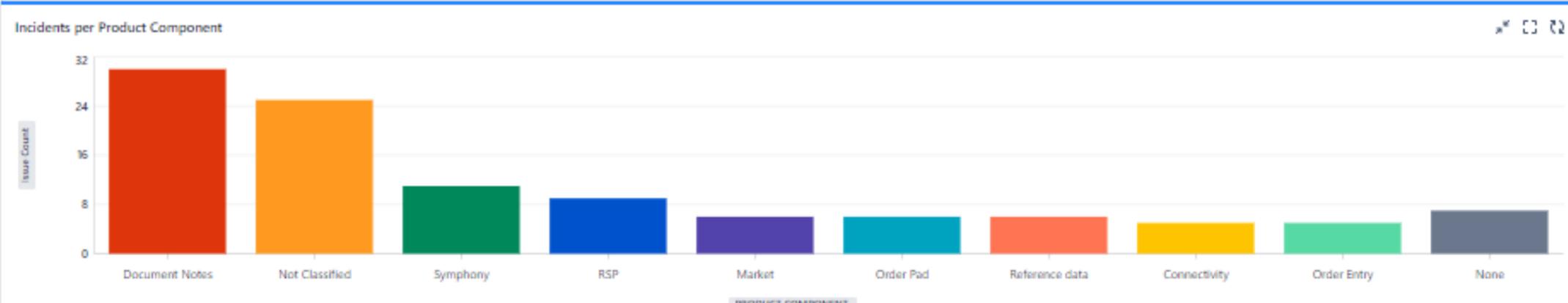
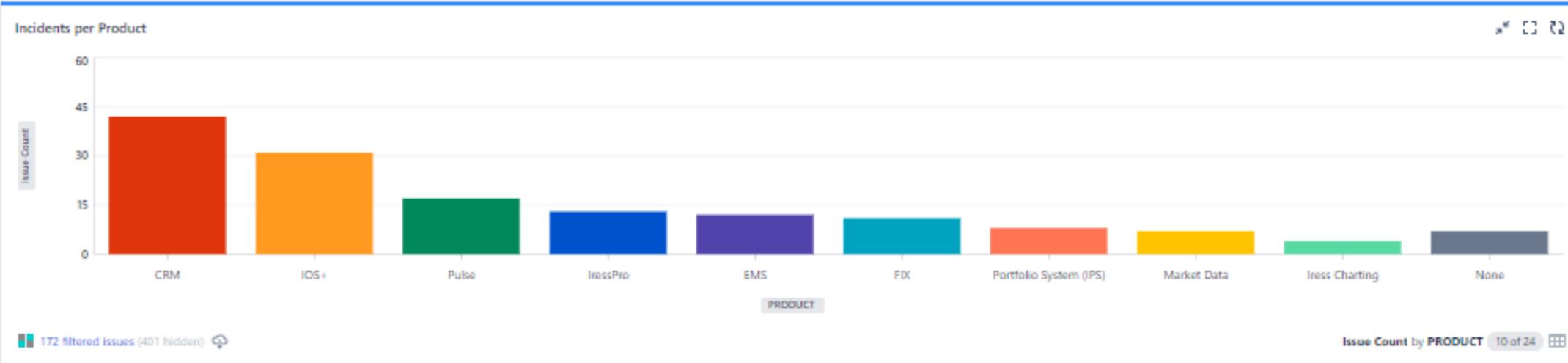


### Solution breakdown by Region

Locale	Financial Advice	Life & Pensions	Trading	Market Data	Investment Management	Platform	None	Total
UK	944	833	180	33	159	0	0	2,149
AU	1,168	2	188	403	93	1	14	1,859
ZA	168	8	117	88	55	0	1	437

## CONTROLLER





# ⚡ Jira Service Management

for Customer Support

# Capabilities today



**CUSTOMIZABLE  
WORKFLOWS &  
AUTOMATION**



**QUEUES & SLAS**



**KNOWLEDGE BASE,  
CANNED RESPONSES**

# Capabilities today



**CUSTOMIZABLE  
WORKFLOWS &  
AUTOMATION**



**QUEUES & SLAS**



**KNOWLEDGE BASE,  
CANNED RESPONSES**



**FLEXIBLE REPORTING**



**ADVANCED FORMS  
WITH CONDITIONAL  
LOGIC**



**MULTIPLE SUPPORT  
CHANNELS**



## Project templates

Software development

**Service management**

Work management

Product management

Marketing

Human resources

Finance

Design

Personal

Operations

Legal

Sales

Analytics

IT

Facilities

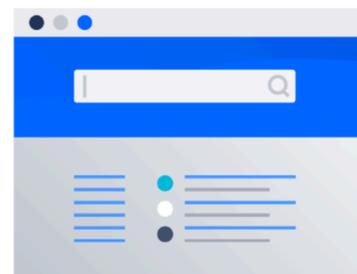
PRODUCTS

# Customer service management

Use template



This template is designed to help teams efficiently deliver great service experiences to their customers. Set SLAs, answer customer questions, prioritize requests, and collect feedback to ensure your external customers or business partners can quickly get the help they need.



### Bring your brand to your portal

Give customers a seamless experience from start to finish with a simple, branded, and intuitive portal that makes it easy for them to get help quickly, and for your teams to streamline incoming work.

### Optimize your queue

Your queue brings together requests from email, chat tools, your service project, and other channels to help you track, triage, and assign incoming requests.



### Improve customer satisfaction

Measure customer satisfaction and improve their service experience with Service Level Agreements (SLAs). Keep track of deadlines based on elapsed time or request categories.

#### PRODUCT

Jira Service Management

#### RECOMMENDED FOR

Teams needing a branded support experience to support external customers

#### REQUEST TYPES

Licensing and billing questions

Other questions

Product trial questions

Report a bug

Suggest a new feature

Suggest improvement

Technical support

Emailed request

#### WORKFLOW

OPEN

PENDING

IN PROGRESS

DONE

REOPEN

What's coming up next

***BETTER  
CUSTOMER  
MANAGEMENT***

***BETTER  
SUPPORT  
CHANNELS***

***BETTER  
AGENT  
EXPERIENCES***



# Customer context

Customer Support Service Project

Projects / Customer support / Organisations

- Queues
Raise a request

KNOWLEDGE

- Knowledge base
Reports

PEOPLE AND CHANNELS

- Customers
Organizations
Invite agent
Channels

SHORTCUT

- Add shortcut
Project settings
Give feedback



Properties

Address
42 Wallaby Way, Sydney

Phone
+1 888-482-7768

Region
APAC

Time zone
AEST (GMT+10)

Primary language
English

Customer status
Gold

Account Manager
Molly Clarke

Purchase date
24/05/2022

Customers 12

Everyone with the domain beta.com is added automatically.

Search input: Enter name or email address

- Annika Rangarajan annika.r@beta.com
Fran Perez fperez@beta.com
Andres Ramos a.ramos@beta.com
Jie Yan Song jieyang.s@beta.com
Omar Darboe omar.d@beta.com

Show more

Requests 13

All the requests opened by customers in this organization for this project.

- CS-1234 I can't log into my account WAITING ON CUSTOMER
CS-1233 Double charged for latest purchase RESOLVED
CS-1221 Do you offer professional services? RESOLVED

 **Beta**

**Properties**

**Address**  
42 Wallaby Way, Sydney

**Phone**  
+1 888-482-7768

**Region**  
APAC

**Time zone**  
AEST (GMT+10)

**Primary language**  
English

**Customer status**  
Gold

**Account Manager**  
 Molly Clarke

**Purchase date**  
24/05/2022

**Industry**  
Pharmaceutical

 **Jira Service Management**    [Your work](#)   [Projects](#)   [Filters](#)   [Dashboards](#)   [People](#)   [Apps](#)   [Create](#)

 **Customer support**  
Service Project

[← Back to project](#)

**Queues**

**STARRED**

Assigned to me 2

**TEAM PRIORITY**

All open 27

**APAC - Open** 5

US - Open 14

EU - Open 8

Escalating 4

Resolved

**> OTHER**

Projects / Customer support / Queues

## APAC - Open

<input type="checkbox"/>	T	Summary	Reporter	Assignee
<input type="checkbox"/>		I cannot access my account	Omar Darboe	 Eva Lien
<input type="checkbox"/>		Can't login	Fran Perez	 Abdullah Ibrahim
<input type="checkbox"/>		How do I export my files?	Amar Sundaram	 Abdullah Ibrahim
<input type="checkbox"/>		I want to move to annual payment	Jane Rotansen	 Samuel Hall
<input type="checkbox"/>		Will there be AI features coming?	Jie Yan Song	 Samuel Hall





Beta

Properties

Address

42 Wallaby Way, Sydney

Phone

+1 888-482-7768

Region

APAC

Time zone

AEST (GMT+10)

Primary language

English

Customer status

Gold

Account Manager

 Molly Clarke

Purchase date

24/05/2022

Industry

Pharmaceutical

SLAs



3h 35m 

Time to first response (Gold)  
within 4h



Customer support Service Project

Back to project

Queues

STARRED

Assigned to me 2

APAC - Open 7

TEAM PRIORITY

All open 27

APAC - Open 12

US - Open 7

EU - Open 8

Escalating 4

Resolved

OTHER

Manage queues

Back CS-1234

View Share More

I can't log into my account

Add subtask Link issue More

Omar Darboe raised this request via Portal Hide details View request in portal

Description Every time I try to log in, I just get a blank screen and it goes nowhere.

Linked issues

impacted by

INC-422 Users cannot access ticketing site IN PROGRESS

Activity Comments

Add internal note / Reply to customer

Open

Customer

Omar Darboe omard@beta.com

Organization Beta Ltd Address 42 Wallaby Way, Sydney Phone +61 423 567 789 Region APAC Status Gold Account manager Molly Clarke

SLAs Time to first response, Time to resolution

Details Assignee, reporter, request type...

More fields Labels, Request Participants, Time..

## Customer Support Service Project

- Queues
- Raise a request

### KNOWLEDGE

- Knowledge base
- Reports

### CHANNELS AND PEOPLE

- Customers
- Organizations**
- Invite agent
- Channels

### SHORTCUT

- Add shortcut

Project settings

Give feedback

Projects / Customer support / Organisations

## Beta

### Properties

#### Address

42 Wallaby Way, Sydney

#### Phone

+1 888-482-7768

#### Region

APAC

#### Time zone

AEST (GMT+10)

#### Primary language

English

#### Customer status

Gold

#### Account Manager

Molly Clarke

#### Purchase date

24/05/2022

## Customers 12

Everyone with the domain beta.com is added automatically.

Add customers

Enter name or email address

Annika Rangarajan  
annika.r@beta.com

Fran Perez  
fperez@beta.com

Andres Ramos  
a.ramos@beta.com

Jie Yan Song  
jieyang.s@beta.com

Omar Darboe  
omar.d@beta.com

Show more

## Requests 13

All the requests opened by customers in this organization

Open request

CS-1234 I can't log into my account

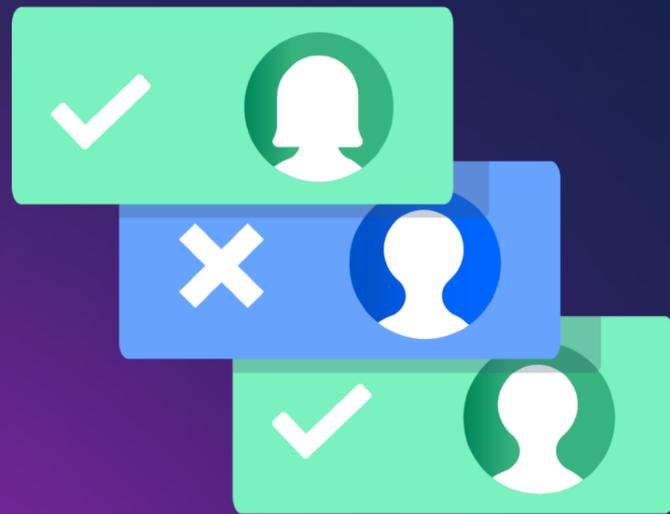
WAITING ON CUSTOMER

CS-1233 Double charged for latest purchase

RESOLVED

CS-1221 Do you offer professional services?

RESOLVED



# SSO for external accounts



Back to project

SITE SETTINGS

Access requests

Emoji

Connected apps

Storage

JIRA SERVICE MANAGEMENT

Portal-only customers **NEW**

EXPLORE

Discover new product

APPLICATION SETTINGS

Jira

Confluence

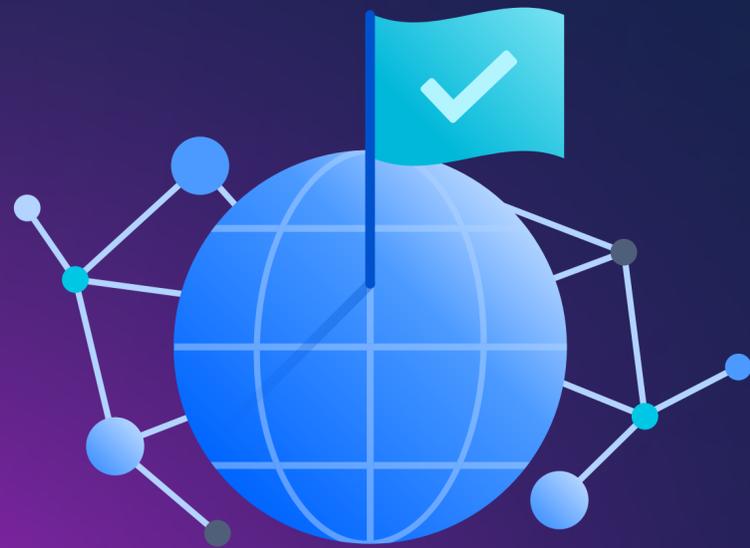
← Portal-only customers

## Identity providers

Manage portal-only customers from one place, your identity provider. Set up SAML single sign-on after you connect your identity provider. [Learn more about connecting an identity provider for portal-only customers](#)

### Choose an identity provider

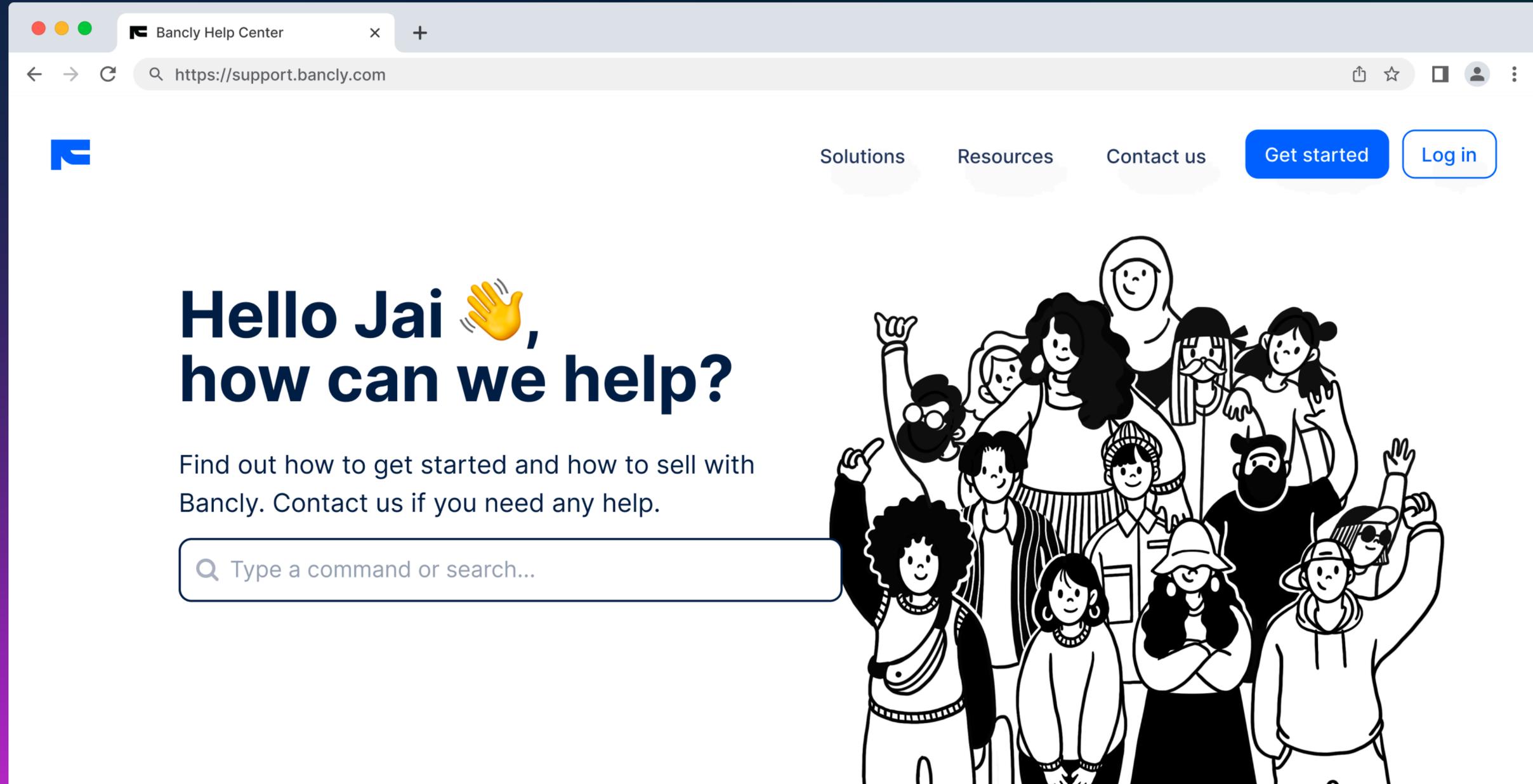
 <a href="#">Choose</a> <b>Active Directory Federation Services</b> Uses SAML to integrate.	 <a href="#">Choose</a> <b>Auth0</b> Uses SAML to integrate.	 <a href="#">Choose</a> <b>CyberArk Idaptive</b> Uses SAML to integrate.
 <a href="#">Choose</a> <b>Google Cloud Identity</b> Uses SAML to integrate.	 <a href="#">Choose</a> <b>Microsoft Azure AD</b> Uses SAML to integrate.	 <a href="#">Choose</a> <b>Okta</b> Uses SAML to integrate.
 <a href="#">Choose</a> <b>OneLogin</b>	 <a href="#">Choose</a> <b>Ping Identity</b>	 <a href="#">Choose</a> <b>Other provider</b>



# Help center custom domains



# Customizable help center



The screenshot shows a web browser window with the address bar displaying "https://support.bancly.com". The page features a navigation menu with "Solutions", "Resources", "Contact us", "Get started", and "Log in". The main content area has a blue logo on the left and a large heading "Hello Jai 🖐️, how can we help?". Below the heading is a subtext: "Find out how to get started and how to sell with Bancly. Contact us if you need any help." A search bar with the placeholder "Type a command or search..." is positioned below the subtext. To the right of the search bar is a large, diverse group of stylized line-art characters. At the bottom of the page, there are four colored rectangular buttons: orange for "Payment information", yellow for "Technical issues", blue for "Manage account", and green for "Administration". Each button has a white arrow pointing up and to the right.

**Payment  
information**



**Technical  
issues**

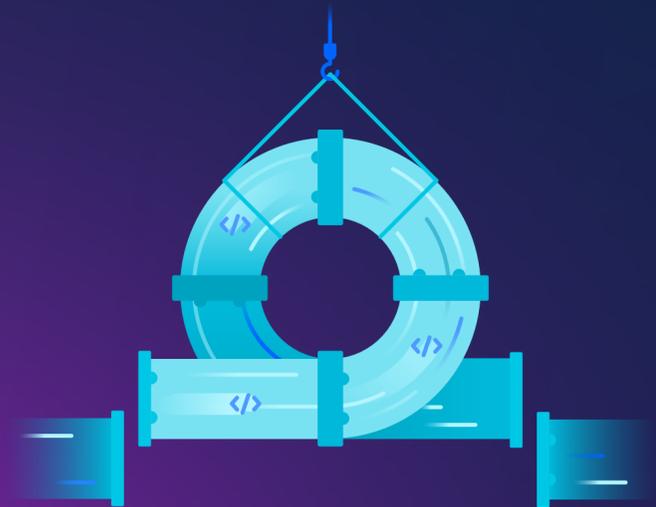


**Manage  
account**



**Administration**





# Developer & product escalations

Customer support Service Project

Back to project

Queues

STARRED

Assigned to me 2

APAC - Open 7

TEAM PRIORITY

All open 16

APAC - Open 2

US - Open 7

Escalating 1

Resolved

OTHER

Back / CS-1234

### I can't log into my account

Attach

Jane Rotansen View rec

Description  
Every time I

#### Linked issues

blocked by

ITHELP-234

#### Activity

Add int

Pro tip:

### Escalate this issue

Choose a project to escalate to

Bancly developers Software project

Suggested issues

ITHELP-234 Big bad problem IN PROGRESS

Create new issue +

Add comment

Describe the problem

This adds a comment on the escalated issue

Cancel Escalate request

Open

Customer

Jane Rotansen 2 jrotansen@beta.com

organisation Beta Ltd  
Address 42 Wallaby Way, Sydney

Phone +61 423 567 789

Region APAC

Language English

Account manager Molly Clarke

SLAs Time to first response, Time to resolution

Details Assignee, reporter, request type...

More fields Labels, Request Participants, Time..



# Atlassian Intelligence

Customer Support Service project

Queues

Raise a request

KNOWLEDGE

Knowledge base

Reports

CHANNELS & PEOPLE

Channels

Customers

Projects / Customer Support / CSS-2393

[Lock] [Eye] [Share] [More]

### Where's my account gone??

Add subtask Link issue ...

Jie Yan Song raised this request via Portal

Similar requests

#### Activity

All Summary Comments 2 History Newest first

- @Jie Yan Song cannot see her account information on the app.
- Last time she accessed her account for a few years ago
- Knowledge suggestions for the following article has not helped  
[How to switch on Accounts on the account list](#)
- Internal record shows she still have access to the account

Summarized by Intelligence Was this helpful [Thumbs up] [Thumbs down]

Pending Actions

#### SLAs

2h 52m	Time to first response
	4 hours
22h 52m	Time to resolution
	24 hours

#### Details

Assignee	Omar Darboe
Reporter	Jie Yan Song
Priority	Major
Knowledge	3 Articles
Labels	iOS MDM

Customer Support Service project

Queues

Raise a request

KNOWLEDGE

Knowledge base

Reports

CHANNELS & PEOPLE

Channels

Customers

Projects / Customer Support / CSS-2393

[Lock] [Eye] [Share] [More]

### Where's my account gone??

Add subtask Link issue ...

Jie Yan Song raised this request via Portal

Similar requests

#### Activity

All Summary Comments 2 History Newest first

Normal text B I ... A ... [Icons] [AI]

Hello!

Save Cancel

Jie Yan Song 14 Mar  
I have tried it already... still doesn't work...

Omar Darboe 14 Mar  
Hello, Lets try starting with an app refresh?

Pending Actions

#### SLAs

2h 52m Time to first response 4 hours  
22h 52m Time to resolution 24 hours

#### Details

Assignee Omar Darboe

Change tone

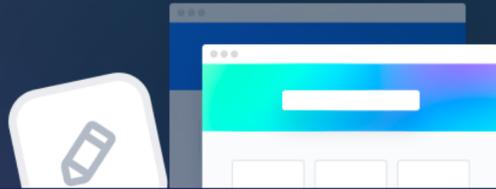
- Empathetic
- Casual
- Friendly
- Professional

Jie Yan Song  
Major  
3 Articles  
MDM

Atlassian Intelligence

- Make longer
- Improve writing
- Change tone
- Ask Intelligence...

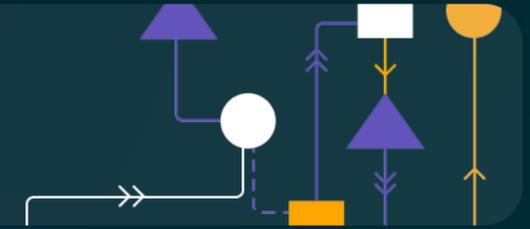
Customizable portal



Customer context

	<b>SilverLine</b>		<b>Donald Stephens</b>
Address	42 Wallaby W	Region	APAC
Licences	494 of 500	Timezone	AEST (GMT+
Status	Platinum		

Customizable workflow



Queues

- APAC Open +10
- US Escalating 6

SLAs

SLAs

- 6h 5m ✓

SSO



Enterprise ready



Developer connectivity

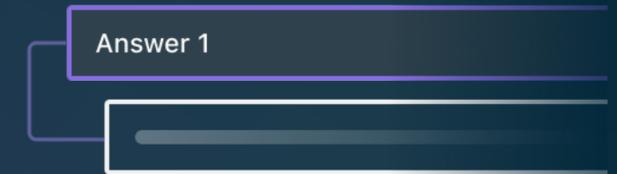
Escalate



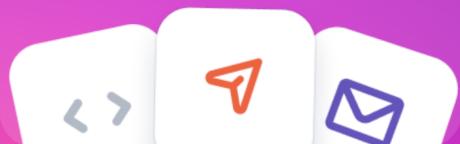
# ⚡ Jira Service Management

for Customer Support

Conditional forms



Omni channel



CSAT



Automation



Request

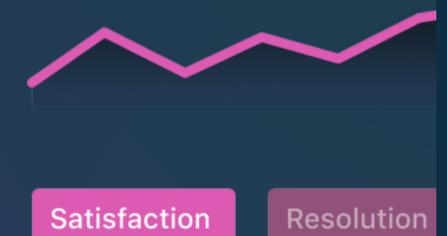
Request details form with a lightning bolt icon indicating automation.

AI

Change tone

- Empathetic
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

Analytics



**Build it**  
**Ship it**  
**Support it**





# QUESTIONS?



**PRODUCT GUIDE**

Service Management for  
Customer Support Teams

▲ ATlassian  
**team**'23

Thank you



Agnes Ro, Head of Engineering, IT Service, Atlassian  
Alex Zhitnitsky, Product Marketing Senior Team Lead, Atlassian