



The content described herein is intended to outline our general product direction for informational purposes only. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions.

The development, release, and timing of any features or functionality described herein remain at the sole discretion of Atlassian and is subject to change.



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



Agnes Ro, Head of Engineering, IT Service, Atlassian
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

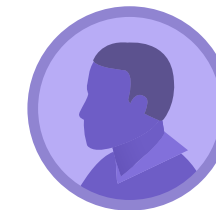


Delivering a great customer
experience is non-negotiable.

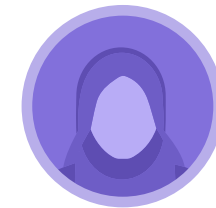
GREATEST CHALLENGES SERVICE ORGANIZATIONS EXPECT TO FACE



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



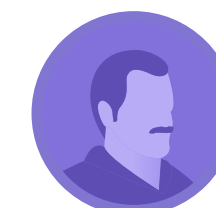
Cost reduction/revenue increase



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



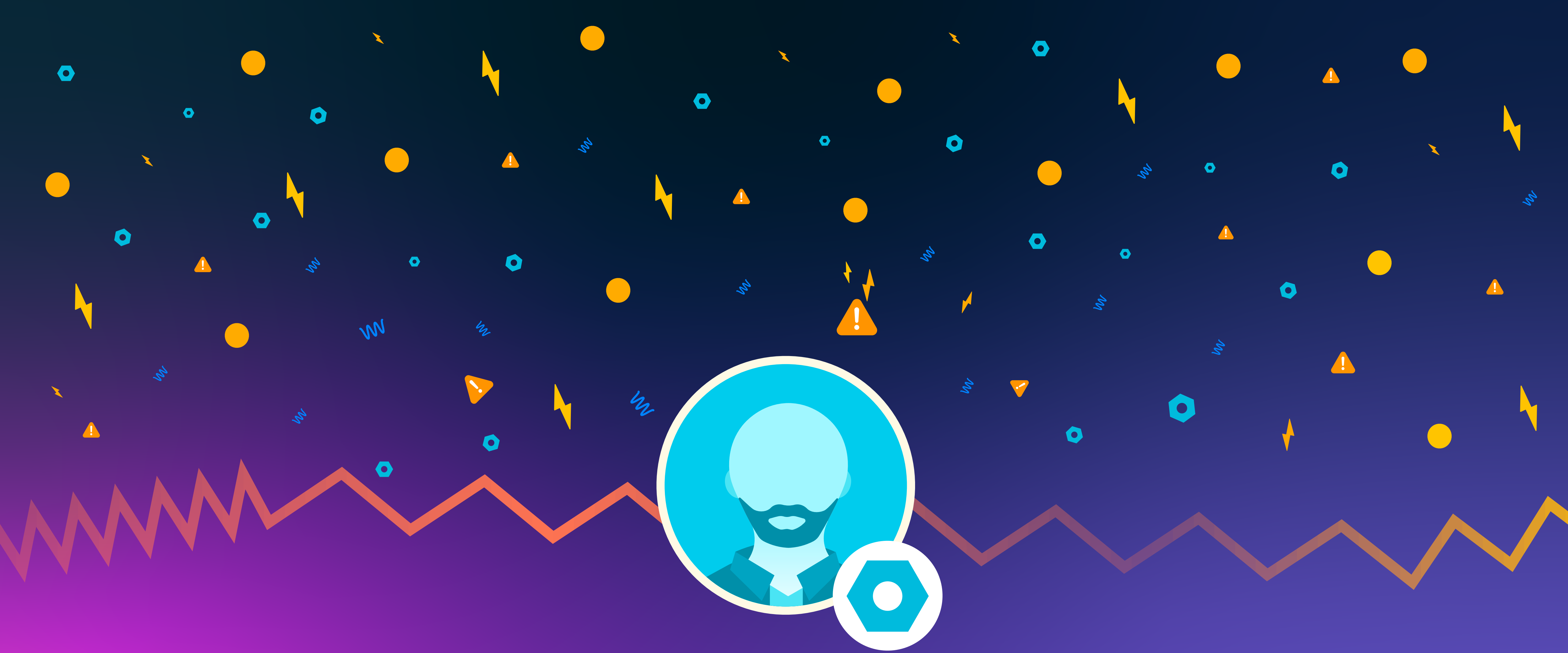
Deliver exceptional,
digital-first customer service

Innovate ~~often~~



*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

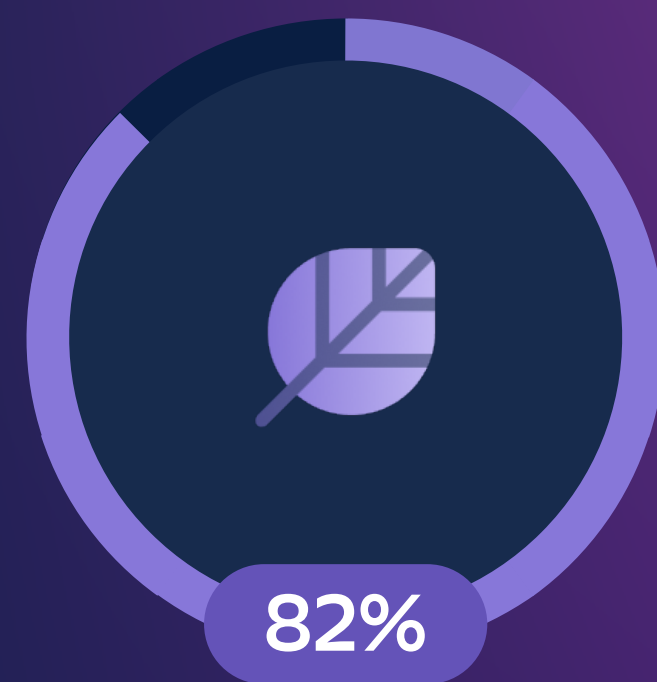
Closing the loop

with

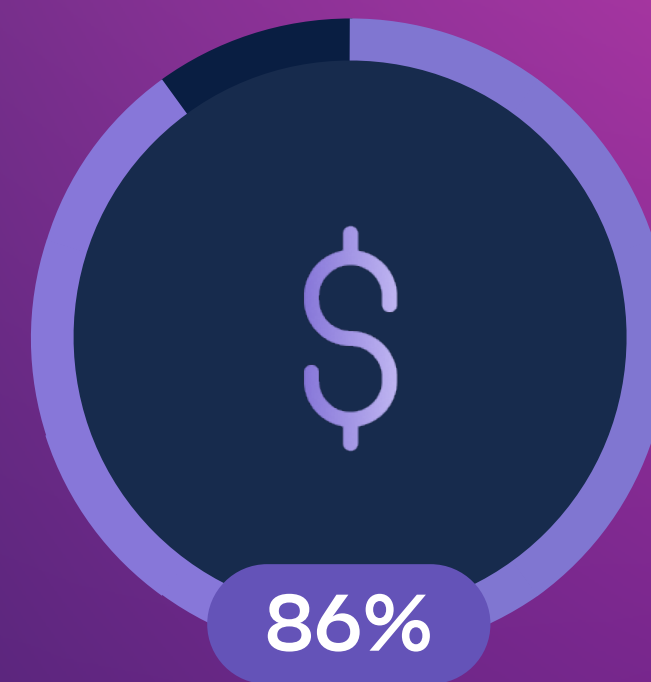
⚡ Jira Service Management



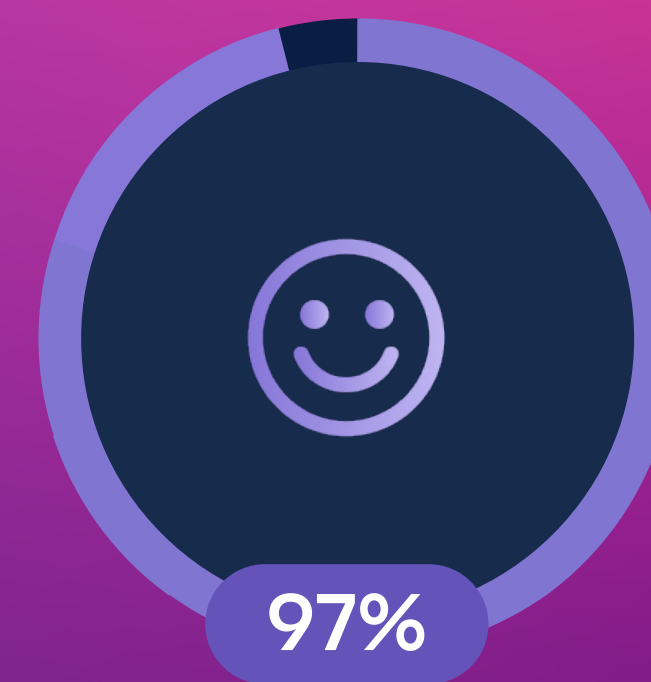
Value-enhancing service experiences have a massive impact on customer loyalty behaviors.



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

Investigate

Link issue

Add form

Add PIR

General

Unused Fields

HP

Hercules Du Preez raised this request via Jira

View request in portal

Description

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

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.

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

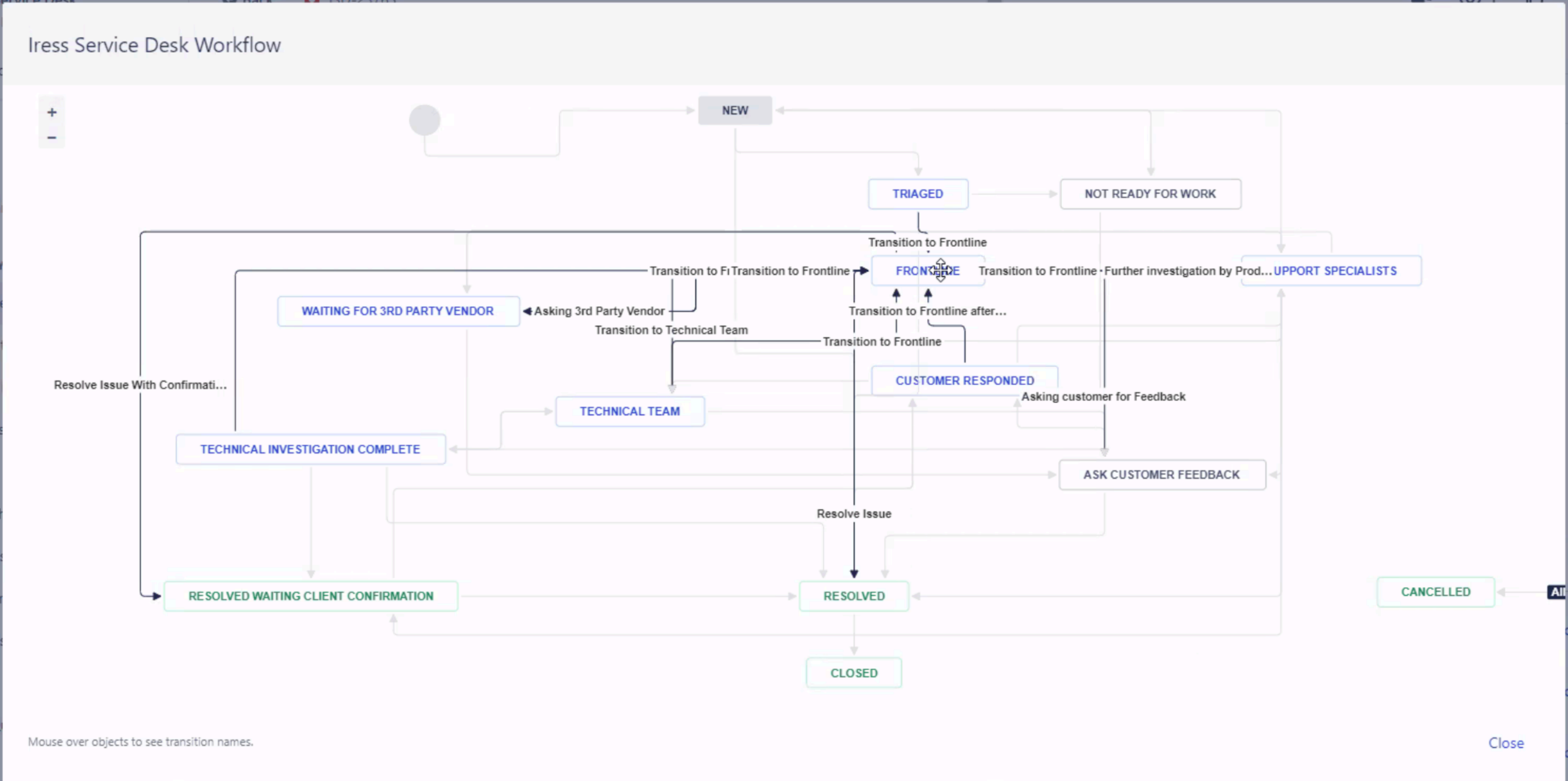
Solution

Investment Management

Product

Fund Data

Product Component

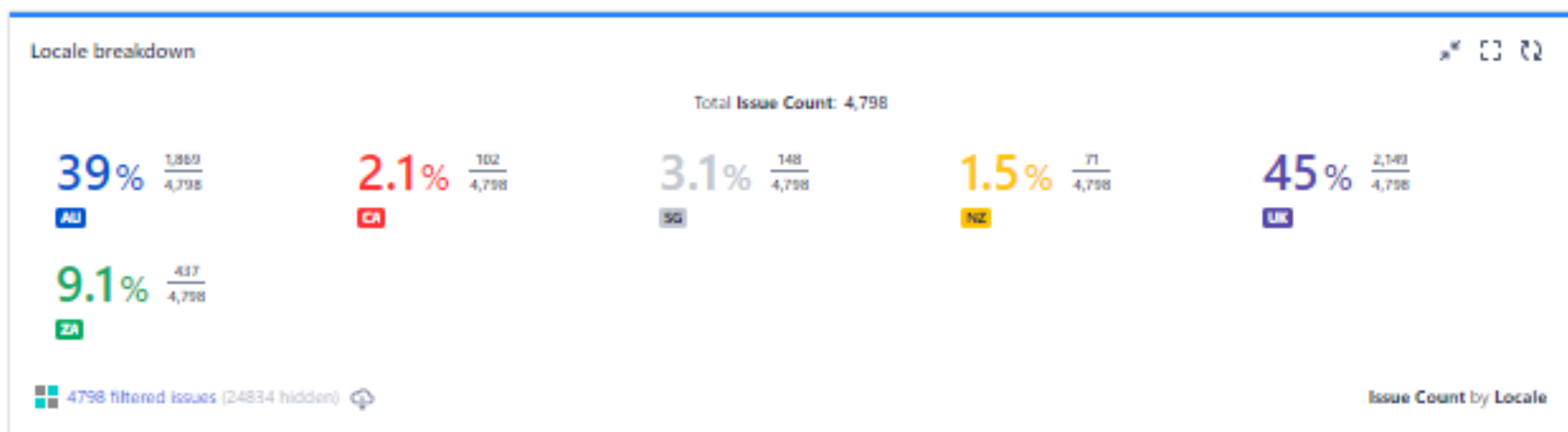
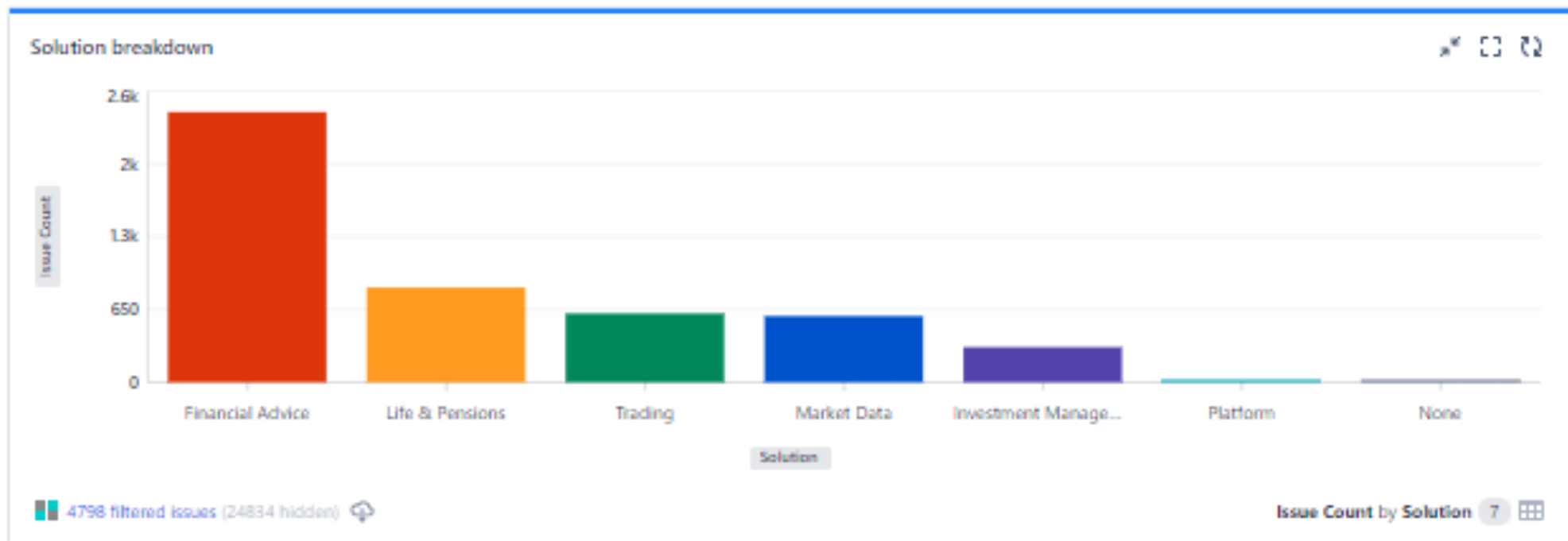
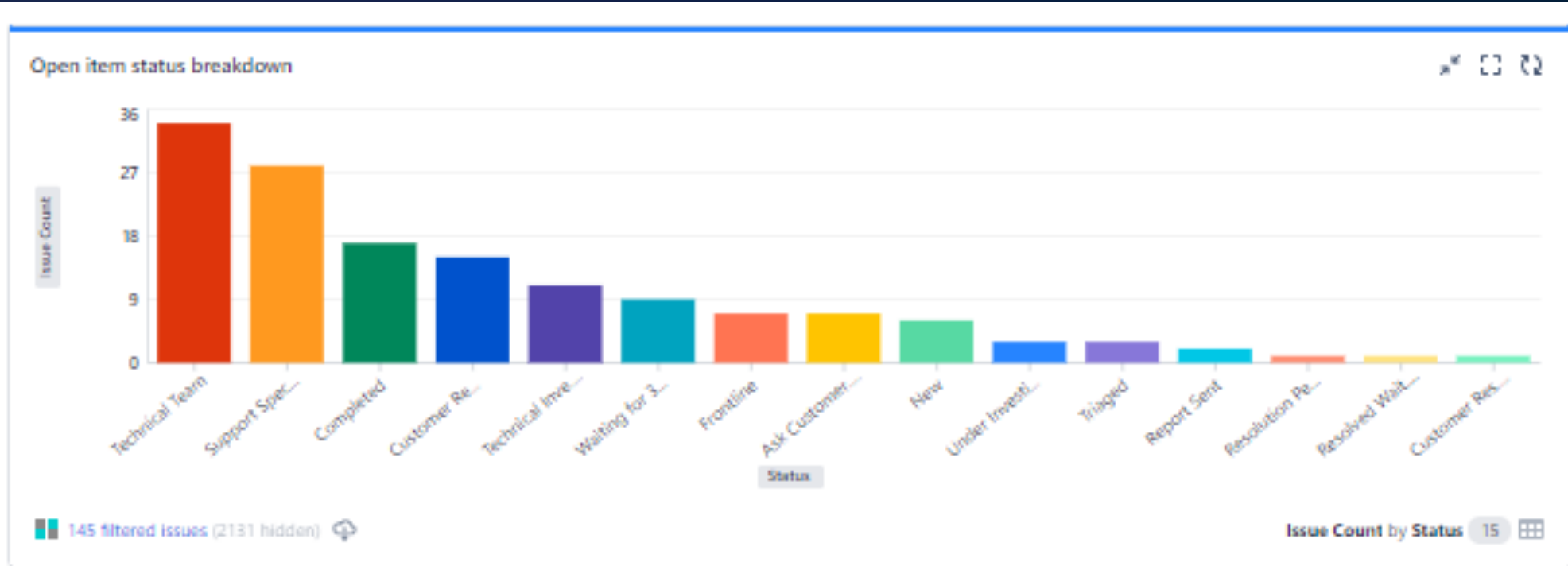




Development

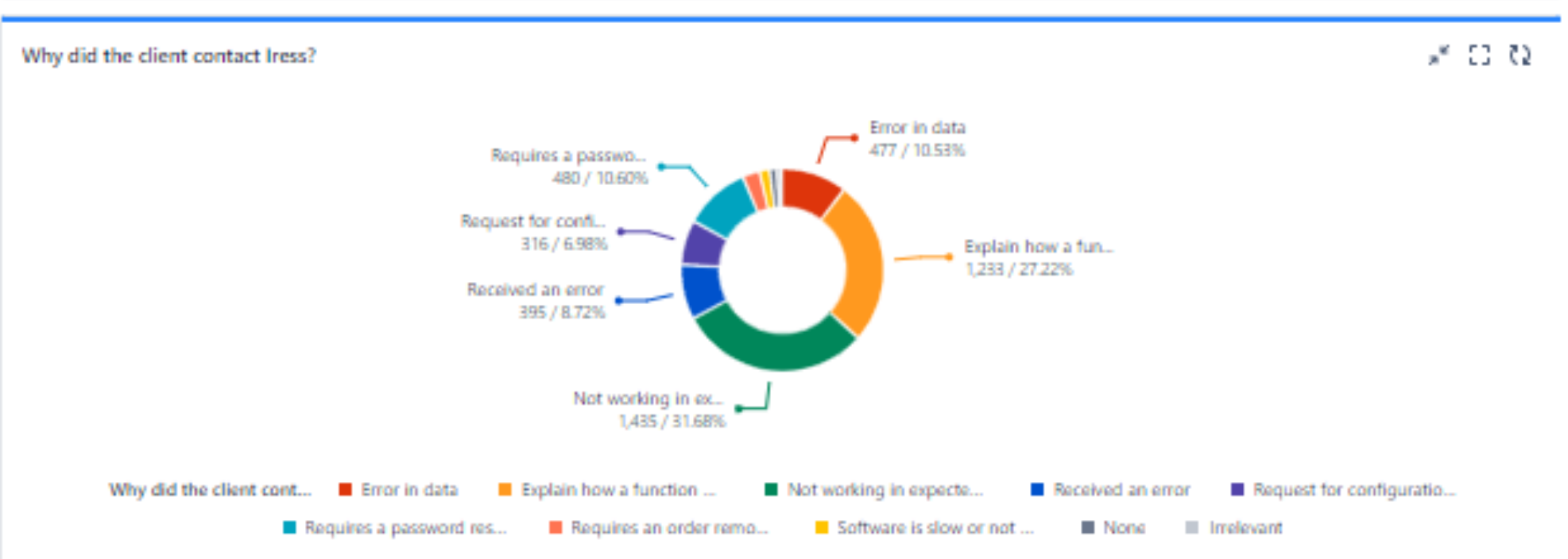
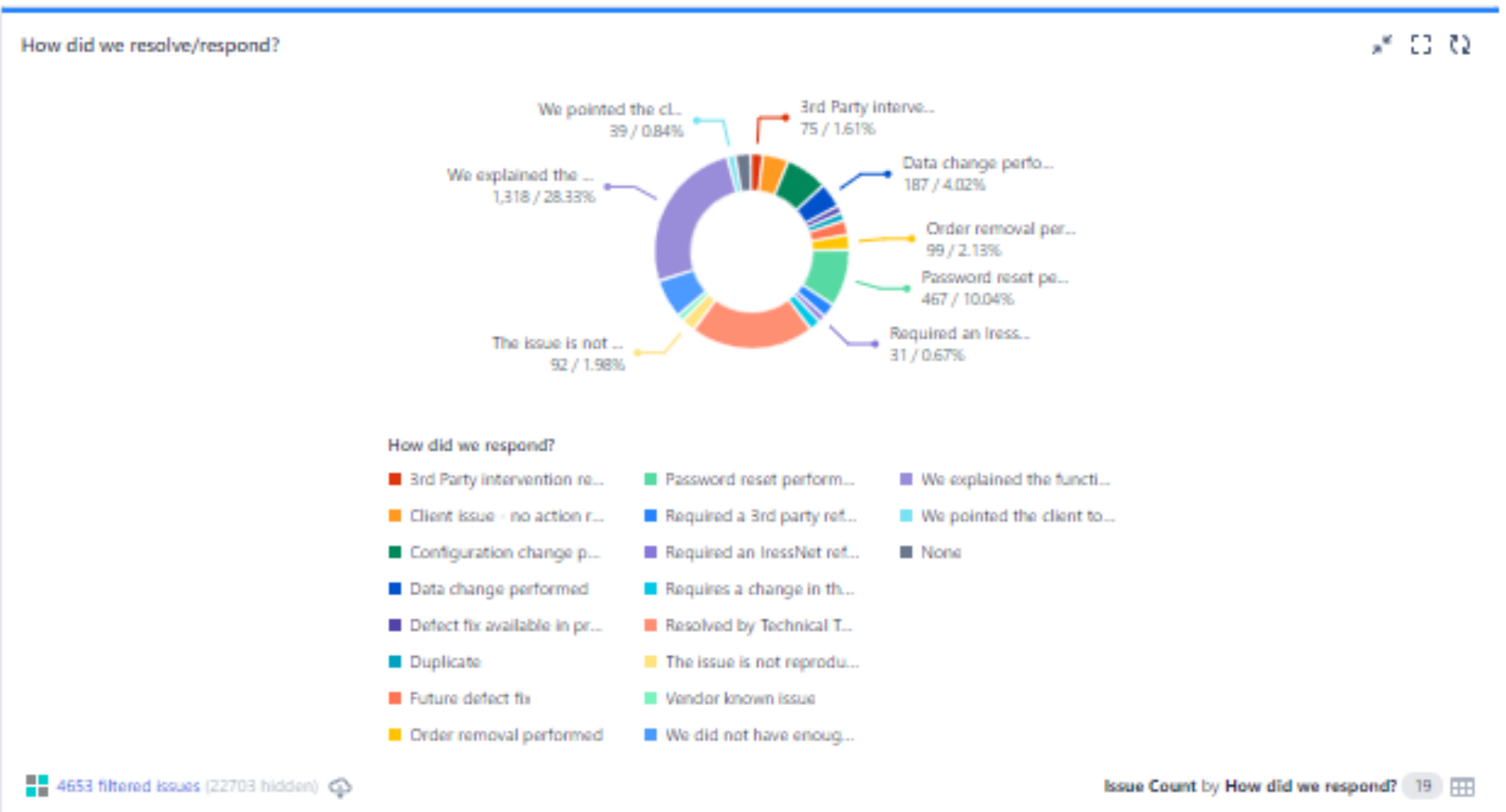


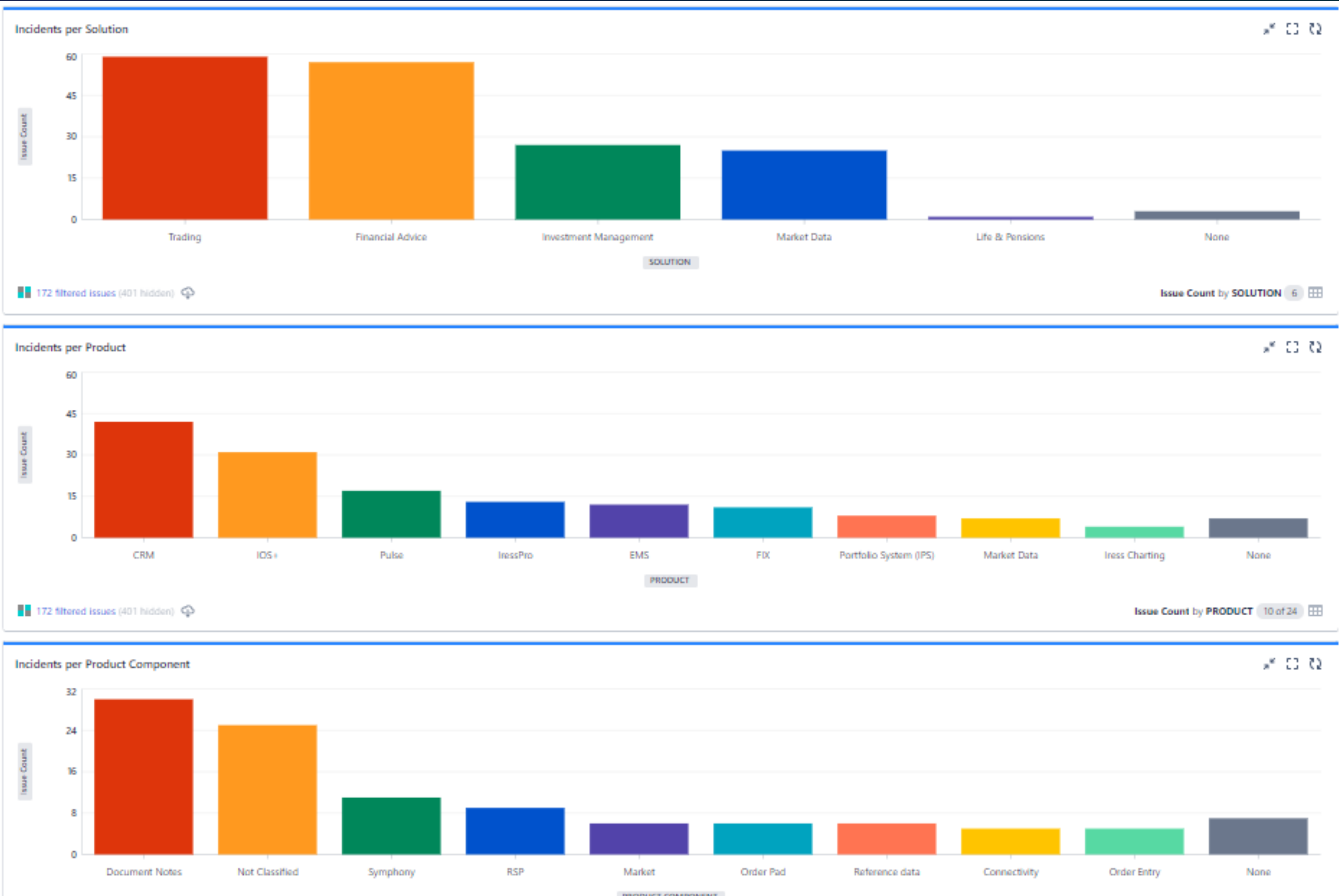
Customer support



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	1,869
ZA	168	8	117	88	55	0	1	437





⚡ 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

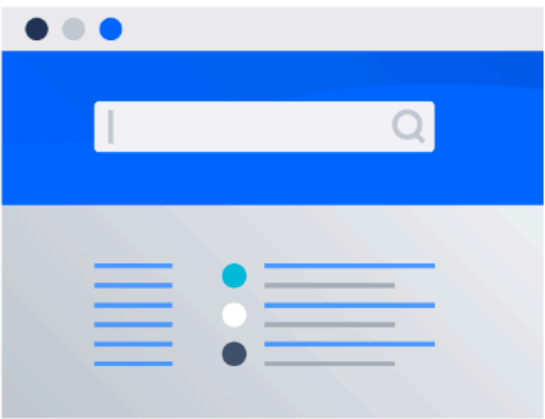
PRODUCTS

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



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 me2

TEAM PRIORITY

All open27

APAC - Open5

US - Open14

EU - Open8











Escalating4

Resolved

> OTHER

Projects / Customer support / Queues

APAC - Open

	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



Properties

Address
42 Wallaby Way, Sydney

Phone
+1 888-482-7768

Region
APAC

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AEST (GMT+10)

Primary language
English

Customer status
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Account Manager
 Molly Clarke

Purchase date
24/05/2022

Industry
Pharmaceutical

SLAs



3h 35m Time to first response (Gold)
within 4h

Jira Service Management

Your work

Projects

Filters

Dashboards

People

Apps

Create

Search

Customer support

Service Project

Back to project

Queues

STARRED

Assigned to me2

APAC - Open7

TEAM PRIORITY

All open27

APAC - Open12

US - Open7

EU - Open8

Escalating4

Resolved

OTHER

Manage queues

Back

CS-1234

I can't log into my account

Add subtask

Link issue

Omar Darboe

raised this request via Portal

View request in portal

Hide details

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

omar.d@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..

Jira Service Management

Your work

Projects

Filters

Dashboards

People

Apps

Create

Search

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.

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

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](#)

Access requests

Emoji

Connected apps

Storage

Portal-only customers **NEW**

EXPLORE

Discover new product

APPLICATION SETTINGS

Jira 

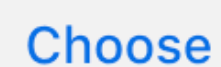
Confluence [\[↗\]](#)

← Portal-only customers

Identity providers

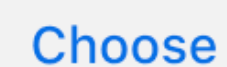
Manage portal-only customers from one place, your identity provider. Set up SAML single sign-on after you connect your identity provider. [Learn more about connecting an identity provider for portal-only customers](#)

Choose an identity provider



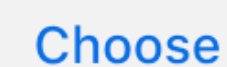
Active Directory Federation Services

Uses SAML to integrate.



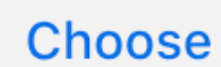
Auth0

Uses SAML to integrate.



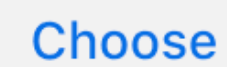
CyberArk Idaptive

Uses SAML to integrate.



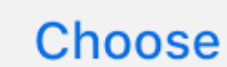
Google Cloud Identity

Uses SAML to integrate.



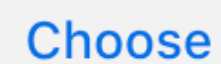
Microsoft Azure AD

Uses SAML to integrate.

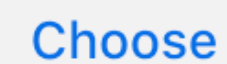


Okta

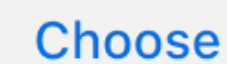
Uses SAML to integrate.



OneLogin



Ping Identity



Other provider



Help center custom domains



Customizable help center





Developer & product escalations

Customer support
Service Project

Back to project

Queues

STARRED

Assigned to me2

APAC - Open7

TEAM PRIORITY

All open16

APAC - Open2

US - Open7

Escalating1

Resolved

> OTHER

Manage queues

Give feedback

Back / ? CS-1234

I can't log into my account

Attach

Jane Rotansen
View record

Description
Every time I log in, I get an error message.

Linked issues

blocked by

ITHELP-234

Big bad problem

Activity

Comments

Pro tip: Add internal notes to help you track the progress of the request.

Open

Customer

Jane Rotansen2
jrotansen@beta.com

OrganisationBeta Ltd

Address42 Wallaby Way, Sydney

Phone+61 423 567 789

RegionAPAC

LanguageEnglish

Account managerMolly Clarke

SLAsTime to first response, Time to resolution

DetailsAssignee, reporter, request type...

More fieldsLabels, Request Participants, Time..

Escalate this issue

Choose a project to escalate to

Bancly developers
Software project

Suggested issues

ITHELP-234Big bad problem

↑

IN PROGRESS

Create new issue +

Add comment

Describe the problem

This adds a comment on the escalated issue

CancelEscalate request

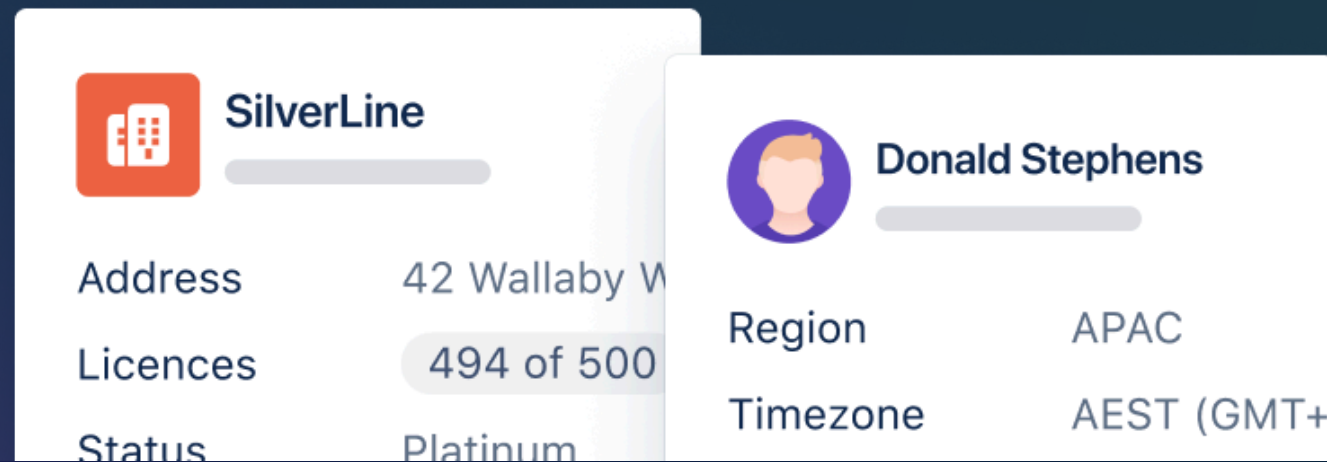


Atlassian Intelligence

Customizable
portal



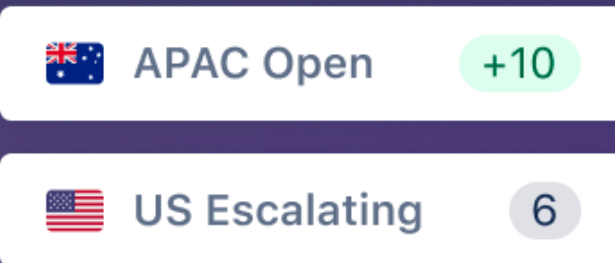
Customer context



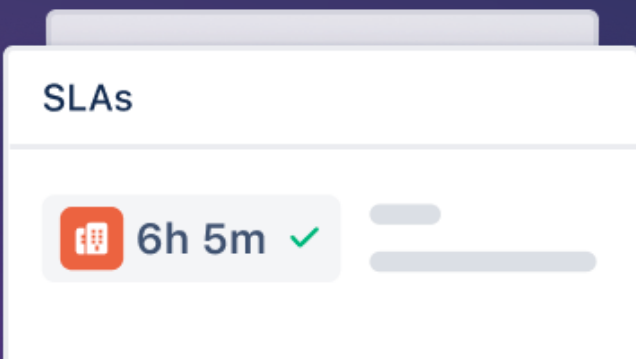
Customizable
workflow



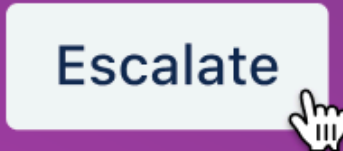
Queues



SLAs



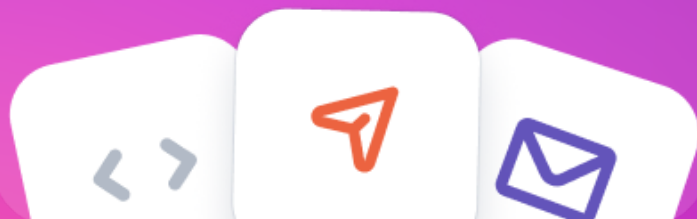
Developer
connectivity



Jira Service Management

for Customer Support

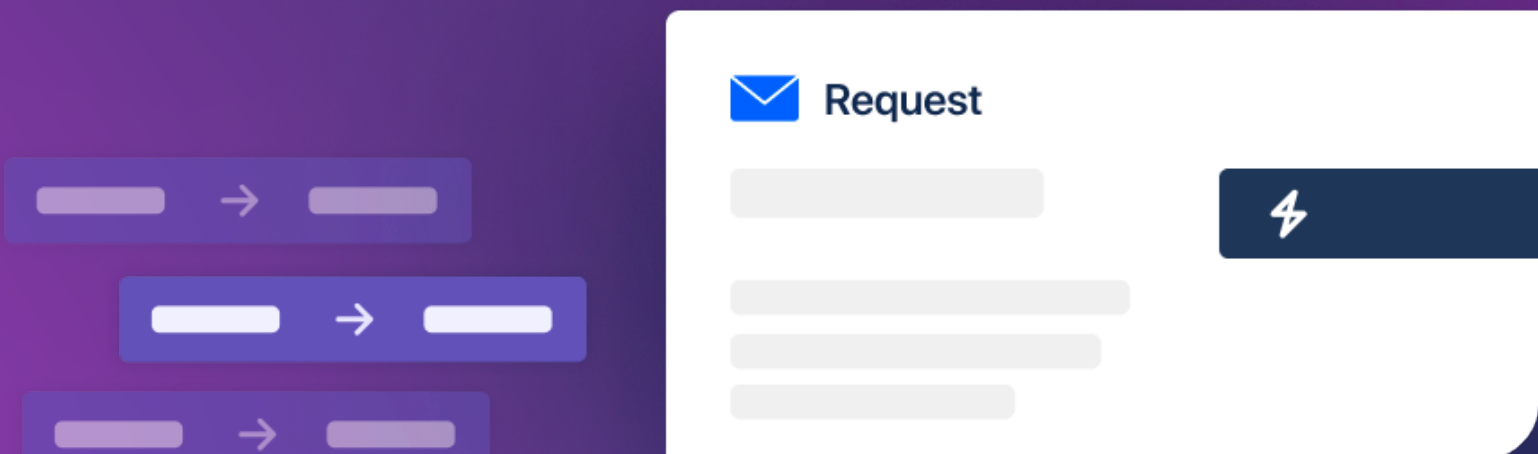
Omni channel



CSAT



Automation



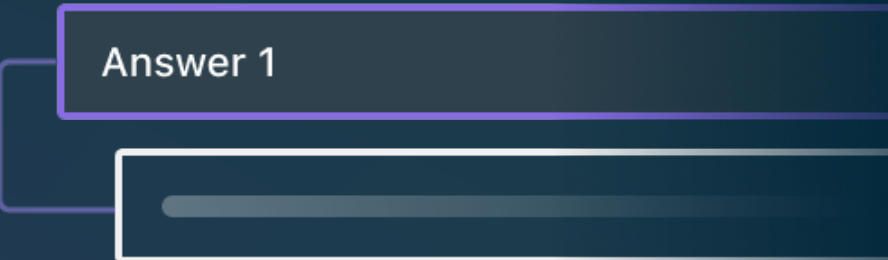
SSO



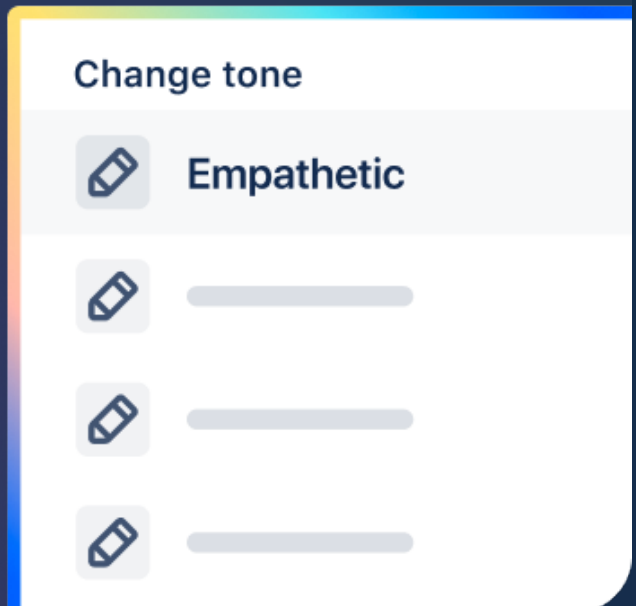
Enterprise
ready



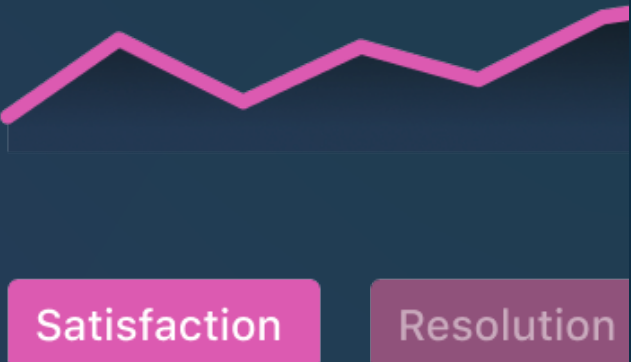
Conditional
forms



AI



Analytics



Build it
Ship it
Support it





QUESTIONS?



PRODUCT GUIDE

Service Management for
Customer Support Teams



Thank you



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