Graduate from Email Support
About the Author

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Caroline Clark is a Product Marketing Manager at Atlassian. She has been doing product marketing within the enterprise collaboration software space for about three years. During working hours she’s passionate about learning and promoting how customers use Atlassian’s tools (especially JIRA Service Desk), both through interviewing customers and writing content. She grew up in New York City and currently lives in San Francisco. In her free time you can find her reading non fiction or attempting a new recipe. Tweet at her @carolinedclark.
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Email support and JIRA Service Desk

Email is the new snail mail

Remember “snail mail”? The irony is, today the phrase that compared physical mail delivery to email—could be used for email itself.

Email is a universal tool for communication. Everyone in your business knows how to use email, and they use it to communicate with all teams.

We’re not making it up. HDI even found email to be the second most popular channel for customers to get in touch with support after phone calls (35% of tickets are received from email):¹
It makes sense, right? Customers already use email for all other business communications, so why not for your teams? They memorize your support team’s email address, and fire off emails to you when they need help.

That’s “email support” in a nutshell: when customers and IT use email to communicate about service requests across the business. Typically, IT teams have a support email address, such as “support@company.com” and share this email address to communicate with customers.

But email is the new snail mail. As fast as email is, it’s not perfect.

In fact, it’s messy. Information gets lost. It’s tough to share previous information, and it’s difficult to organize or track.

This makes email a poor tool for collaboration, and that goes for your service teams as it does for any other team.

That’s where JIRA Service Desk comes in.

This e-book covers a particular use case where your IT or business teams rely heavily on email to communicate with customers about service requests.

In this e-book, we will describe how:

• Relying only on email support can be unproductive - and create longer lead times and unhappy customers
• Investing in a service tool can help resolve these pain points
• Integrating email with JIRA Service Desk is easy to set up
• Twitter was able to stop relying only on email support - and ended up reducing service requests coming from email by 90%

By the way: we don’t hate email!

Your IT teams don’t have to eliminate email, but instead, you can work with it… seamlessly. By integrating your email systems with JIRA Service Desk, your IT service teams can add the power of a service tool on top of email support, while giving customers an intuitive and easy to use experience.

Notes:
Chapter 1

Pain points of email-based support

Why do you need to get off email support?

Relying only on email support can create time sinks for your team and customers:

• By not getting the right information from the start, 70% of people say that they waste time going back and forth in trying to give and get the right information about the problem.¹
• Requests can get buried in one inbox. Twitter’s IT called this the “black hole” of email requests – a place where email went…. maybe never to be seen again.
• When agents all share one inbox, they have low visibility about what they’re working on. Resolution times slip when agents assume others are working on requests.²
• Not being able to track work and specific request types means that the IT team cannot report on progress. This makes it harder for IT to show the value to the rest of the business.

Not getting the right information:
The ping pong of email support

Have you ever been at home and discovered your sink isn’t working – and when you get around to shooting an email to the plumber, you realize you have no idea how to describe the problem?
In cases like these, the plumber knows exactly what questions to ask to get to the root of the problem, but you don’t.

Providing the right information requires a conversation with the plumber. Or at the very least, the plumber letting you know what information is needed.

This often happens with email-based IT support. Any time a problem or need arises, the employee can easily describe the symptoms but may forget important information about the context. For example, let’s say there is a standard database question. Often, the conversation looks like this:

In this case, the employee forgot to give the needed information to the IT agent – including relevant information about the database, such as **what database they needed access to, which tables they were interested in, what level of permissions they need, and what the priority level is.**

What happens next is either the employee never responds to the IT agent’s questions and the ticket falls into a black hole (and creates delays for both employee and IT agent), or the start of a ping pong of email support.

A recent survey conducted of IT teams who rely only on email for support found that getting the right information from the start is the biggest pain point:

70% say “it’s a constant problem” to go back and forth with employees about getting the right information

The same research even found that an alarmingly high amount of emails don’t contain the correct information right off the bat:
of the time the original email doesn't contain the right information for the agent to solve the problem

That translates into a lot of wasted time for both your employees and agents. And, as the saying goes: Time = money.

As your team builds out a robust support center for teams across the business and relays its value for the rest of the business, it’s critical to ensure that costs are effectively managed. While email support may seem cheap, there are a ton of hidden costs. Lost information, delayed support, and frustrated employees among them.

Agents colliding in one inbox

Sharing one inbox is tough.

When requests come streaming into one inbox, your agents likely scramble to reply to each one as soon as they can but they don’t know who else is working on them. What happens next is “agent collision”: when two agents reply to one email. If they give conflicting information, they’ll cause customer confusion.

Another, even worse scenario, is when an email is never answered because everyone assumes someone else is already taking care of it.

A recent survey of IT teams who rely only on email for support found that managing teams efficiently is a big pain point:

65% say it’s a problem that they can’t assign work to agents efficiently

And that they can’t report on trends or measure how their team is doing:

60% say it’s a problem that they can’t report on team performance

To prevent agent collision, your help desk manager is tasked with figuring out who’s working on what and when. They email everyone again, or ping individual agents.
This can turn into a game of musical chairs while trying to figure out who’s free to work on an issue.

As a result, the help desk manager is assigning the wrong people to the wrong tasks and it takes much longer to resolve tickets.

**Requests get buried**

Twitter’s IT call this phenomenon the “black hole” of email requests – a place where email requests go...maybe never to be seen again.

By not being able to have a system that manages all your email requests, it’s easy to have them fall through the cracks. Once an email is forwarded to someone else, often people assume that is being taken care of – while it was never resolved.

Your team doesn’t have to have a black hole.

**Can’t report on trends**

Two key elements involved in managing effective and productive teams are tracking progress and seeing trends. For measuring progress, emails are hard to track.

There’s no structured data around email, and no way to track specific variables over time.

Want to know how your teammates are handling their tickets? Need to budget for the next year and want accurate predictions for resources? This will be hard if your team relies on email support alone and has no way to effectively measure trends.

To mitigate these pain points, JIRA Service Desk offers workflows that can help the service desk manager manage teams effectively.

Read the next section to learn how a service desk tool can help you and your team become a legendary service desk.

Notes:
1. Atlassian Research Labs and CEI Research, February 2015.
2. Ibid.
Chapter 2

Investing in a service tool: How JIRA Service Desk can help

A service desk to the rescue

A service desk can resolve all the pain points brought on by email support by:

• Getting the right information from the start
• Ensuring that a ticket is never lost again
• Routing tickets automatically to the right queue
• Assigning work efficiently

60% of those relying only on email support indicated that they are planning to invest in a service tool.¹

We admit, we’re a little biased toward JIRA Service Desk. Though other service desk apps can address these issues, let’s walk through specific examples of how JIRA Service Desk resolves these email support pain points.
By the way, if your team already has JIRA or Confluence, JIRA Service Desk integrates with these tools. Tickets can be linked between JIRA and JIRA Service Desk so IT teams can communicate with developers. If users are typing in common requests, Confluence articles can automatically pop up with suggested solutions.

**Capture the right information from the start**

Remember when that customer needed help with the database in Chapter 1, but the agent had no idea what database he needed access to, what level permissions he needed, and what the priority level was?

In that same scenario, when our customer files a database request, he can file it using a standardized form through the customer portal:

In this case, our customer (who isn’t a database expert) is prompted to provide information. To the side of each form field, instructions and examples are provided of what information is needed. Better yet, there are links to knowledge base articles that can deflect tickets: for example, a link to what databases Joe already has access to and doesn’t need to file a request for.
The form fields are specific to each kind of request. The IT team can customize these form fields for different kinds of requests, including:

**Requesting a new computer**
(What model? Mac or PC? Necessary applications?)

- **Summary of the problem**
- **How urgent is this for you?**
- **Details**
- **Location**
- **Attachment (optional)**

**Requesting new software**
(What software do you need? Why do you need this software?)

- **Summary of your request**
- **Details**
- **Location**

atlassian.com/service-desk
IT for a meeting room
(What is the room? What is the context? Was there any testing done?)

Giving more information up front means less ping pong, faster resolution times, and happier customers.

Never lose tickets again

JIRA Service Desk has queues to track, organize, and update all your service requests.

They are completely customizable to suit the needs of any IT team.

For example, queues can be organized by:

- **Assigned to me**: This is the view of any IT agent who logs into the service desk. They show all tickets that are assigned to that particular agent.
- **Unassigned issues**: These requests are currently unassigned to any agent. Anyone (depending on how you set up your service desk) can assign themselves to a particular issue.
- **Assigned to the team**: These are currently assigned to someone else. This way, everyone gets visibility into what everyone else is working on. Past tickets are available for IT agents who don’t know the answer to a certain question, and can reference it to find the solution to an issue.

Each queue is sorted by service-level agreements, with those that are the closest to breaching service-level agreements on the top - so that they can be immediately worked on by the IT agent.
Atlassian, we create queues that represent teams. We organize by task, issue type, priority, even by location

Nikki Nguyen, IT at Atlassian

Want to set up a queue?

You can do it two ways: either through our “basic” set up or through JIRA Query Language (JQL).

Queues can be customized based on the following elements:

- Type of ticket
- Status of ticket
- Resolution
- Labels
- Priority level

Here is an example of how to set up a queue:
JIRA Service Desk 2.4 released a new feature in which queues are automatically updated with new tickets. Agents don’t have to ever refresh queues to see the latest!

**Collaborate efficiently**

JIRA Service Desk eliminates the issue of agent collision and sharing one inbox by automatically having tickets be routed to the right agent.

When tickets are created with JIRA Service Desk, they will be triaged automatically in their respective queues for your team to handle. For example, tickets can be about “faults,” “hardware” or “software.” This creates context around the ticket and allows agents with domain knowledge to respond quickly. There is also visibility across the entire team on what kinds of tickets are coming in, and when.

When the ticket is unassigned, the team lead can assign agents to tickets, or an IT agent can assign tickets to themselves:

After the agent is assigned, only that agent and customer get email notifications about that ticket, but anyone else on the team can see the conversation.
Also, anyone can comment on the ticket. IT agents can bring in experts who may have more knowledge about the issue, or the employee can bring in people who were also involved with the issue.

Mitch brings in Jennifer to get information about the problem.

Harvey mentions Alana in order to give more feedback about other customers having the same issue.
Track performance

JIRA Service Desk can allow IT teams to collect data and recognize trends in performance.

Reports are useful for:

- Measuring the workload of the team: are they under or over capacity?
- A team lead can see which agent is available
- Seeing trends in which issue types are coming in and which are being resolved
- Show improvements for key performance metrics: time to resolution, service-level agreements, etc.
Reports are easily customizable. Set up a report by selecting the data you want to sort it by.

Finally, once a report is ready and data has been collected, anyone can adjust them based on time periods.

**Happy teams mean happy customers**

By investing in a service tool and migrating from email-only based support, teams can manage workflows more efficiently, automate processes, and rely on structured data to predict future work. After setting goals and hitting them, teams can feel a sense of accomplishment and continue to feel motivated to provide great service.

Notes:

1. Atlassian Research Labs and CEI Research, February 2015.
Chapter 3

Easing the transition from email to a service tool

After setting up your email support with JIRA Service Desk, there are a few ways to ease the transition from email to a new ticketing system to ensure high adoption and happy customers.

By the way, this process can apply to any new software system – not just to JIRA Service Desk.

It’s an evolution

It’s important to remember that change is an evolution. It doesn’t just happen overnight. Having realistic goals means it will be more exciting once your team hits them out of the park.

There will be a time of transition during which customers will be using both the customer portal along with email in order to communicate with agents. Here are some tips on how to get where Twitter got to with 90% of their requests coming in from the customer portal – and show off to the management team your software system’s high adoption numbers.
Market your service desk

Alex Stillings from Twitter calls the “How do I market the service desk?” the “$10,000” question because it’s a key element of implementing any new ticketing system.

There are many ways you can market a new service desk – from integrating it within the onboarding process, to having the URL being easy to remember (check out this service) or even having a corporate party to celebrate the new tool.

Keep it simple – and collect feedback

Collecting all of the right information is important for support requests. But it’s important to keep the service desk simple to use to increase and maintain customer adoption. Make the language friendly and easy to understand. When creating a new form, have a “beta run” with a few customers and collect feedback.

Be consistent

Whenever you’re encouraging a change in behavior, it’s important to stay consistent.

Remind employees that email is the secondary means for support – the ticketing system is the best means for support.

You’re all set up to get started on a great journey!
Here’s an action plan for you to get started:

- Identify key stakeholders across your company. Have interviews with them to see where the key challenges are, and how to resolve them with a service desk tool.

- Look at past email requests within the past six months. What are the most common questions? How should they be categorized? What information is needed for each request? Simplicity is key.

- After your service desk is set up, test it with key stakeholders and others within the company. Collect feedback and iterate as necessary.

- Launch the service desk! Send out an email, place posters around the office, have a party.

- Have a period of time in which users are using both email and service desk.

- If you’re a Confluence user, consider taking the service desk to the next level by setting up a knowledge base with FAQs.

- Set goals: resolution times, first contact to resolution, etc.

- Reward milestones and when goals are met!
Now that you know how to graduate from email with JIRA Service Desk, it’s time to get your IT team to work.

Spin up a free trial of JIRA Service Desk so you can:

- Get the right information from the start
- Ensure that a ticket is never lost again
- Route tickets automatically to the right queue
- Assign work efficiently

Build your IT Service Desk now
Twitter reduces email support volume by 90%

At Twitter, there used to be something called the “Black Hole.” When service request volume skyrocketed, new requests seemed like they were flowing into the void—perhaps never to be seen again.

It was 2013, and Twitter’s internal IT team was faced with a flood of requests as the company grew from 900 to 3,600 employees in just two years.

The big question: how would they continue to provide great service while growing like crazy?
The IT team handled about 25,000 tickets—about 2,000 tickets per agent—in 2013 alone. The whole company was in the hands of a small IT team of just 14 agents, charged with making sure every employee received great service in the midst of this ever-growing number of requests.

Twitter needed a solution. The company was growing at the speed of a rocket and they had to scale their internal service to meet the growth head-on.

**Email was the new snail mail**

How did tickets start entering the “black hole” in the first place?

Email.

Like other businesses, email was the primary way employees made service requests. Emails would come pouring in, and there was no easy way to track, manage, or route requests to the appropriate agent.

An employee would think a proper request had been made only to discover they hadn’t provided the right information. The agent and employee would need to go back and forth clarifying issues before the agent could even begin to address the request.

> At Twitter, we realized that email support really wasn’t scaling for us. We really needed something that was a little bit user friendly.

Twitter needed something that was intuitive for their employees, easy to set up, and could scale with the business.

JIRA Service Desk was a natural fit.
An intuitive customer portal

JIRA Service Desk’s customer portal provided an easy way for customers to file requests.

Adoption time was critical, and Twitter was delighted by the immediate results. JIRA Service Desk had an 80% adoption rate by Twitter’s employees. They loved the simple and easy-to-use interface.

Right from the start, fewer email requests were submitted, and more requests came in through the customer portal.

There was a dramatic dip in email support. Previously we were doing 95% email support. Now it’s only 10% email support.

Now that requests were coming in through JIRA Service Desk instead of email, tickets contained all the right information, went to the right queues, and were routed to the right people.

Self service for the win

But there’s more! JIRA Service Desk offered a way to mitigate the volume of requests even before requests were filed.

By integrating with Confluence, Twitter’s internal IT team deflected tickets by automatically surfacing knowledge base articles based on relevant keywords.
We’re excited about our knowledge base. If a user comes in and types a question, [JIRA Service Desk] puts those articles in front of the user to try to reduce ticket volume and help them get help for themselves. It’s a big win for us.

With helpful self-service options, employees were able to solve their own problems without having to consult an agent. A huge win-win for Twitter and the IT team.

**From 1 to 112 service desks**

Today, Twitter has 284 million monthly active users and 26 offices across the world.

Other teams quickly saw the benefits of getting off email and adopting a tool to organize their requests, including human resources, procurement, and facilities teams.

Now with over 100 teams using JIRA Service Desk, Twitter is able to scale up their support for thousands of employees and millions of users.

“JIRA Service Desk can really increase your team’s efficiency and easily scale your ticketing to meet your business needs,” says Stillings.

**Hungry for more?**

In March 2015, we hosted a webinar with Twitter about how to Graduate from Email Support.

We got a lot of questions right afterward (hundreds of them!) and as hard as we tried to answer each one, we didn’t have the ability to answer them all in the limited time we had. We wanted to make sure that everyone still got answers, so after reviewing the questions, we posted the most common ones along with our answers.