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Group Manager, Supportability

[assessingforawesome.today](https://www.intuit.com/assessingforawesome/today)

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01

About me

Mission, Passion, and Profession

Hello

my name is

Will

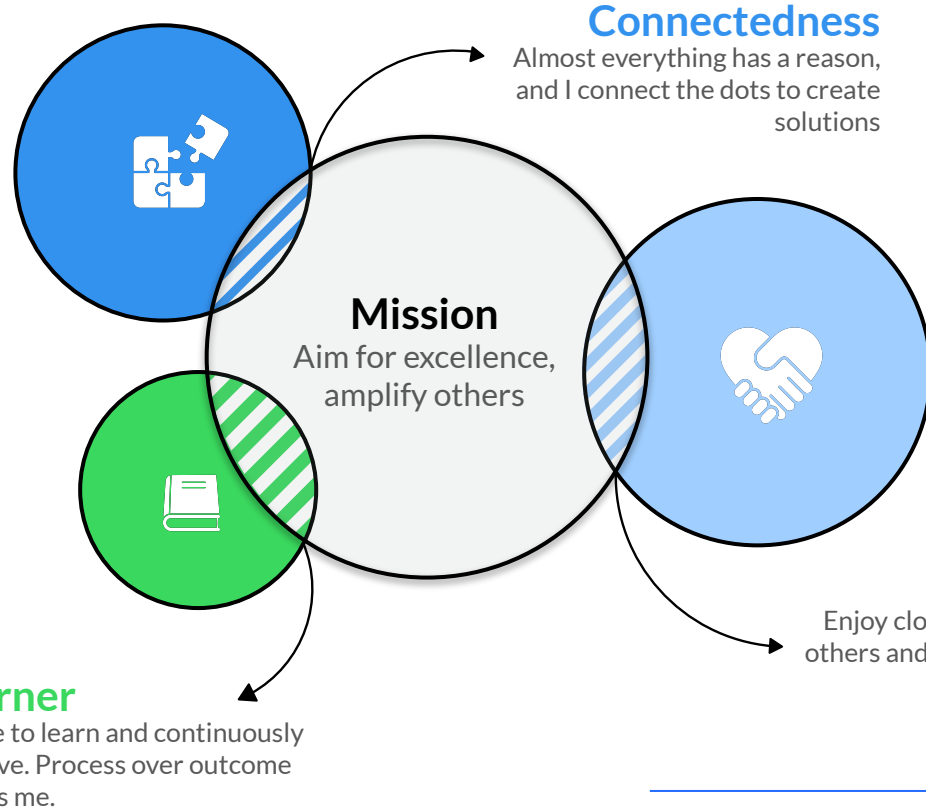


My mission

**“Aim for excellence,
amplify others**—my
compass is set by Faith,
Family, Fitness, Finance,
and Fortitude. Wisdom and
knowledge pave the path.”

My Strengths

energy + passion





My Leadership Experience

Global Product Management Experience



Built, led, and implemented strategic product Help Experience roadmap at Intuit & AppFolio

Customer Experience



Leveraged customer voice, data, and business intelligence to drive innovation across product lines.

Operations & Business Intelligence



Led customer success operations and optimized efficiencies. Focused on data analysis, and process improvement.

02

Project 1: appfolio

Help Experience Transformation



appfolio

Help Experience Transformation

Objective:

Create a holistic vision and strategy centered on Effortless Help with a focus on digital capabilities. Shift from a traditional phone support model to a modern, AI-enhanced and proactive customer experience.

My Role:

Director, Customer Experience

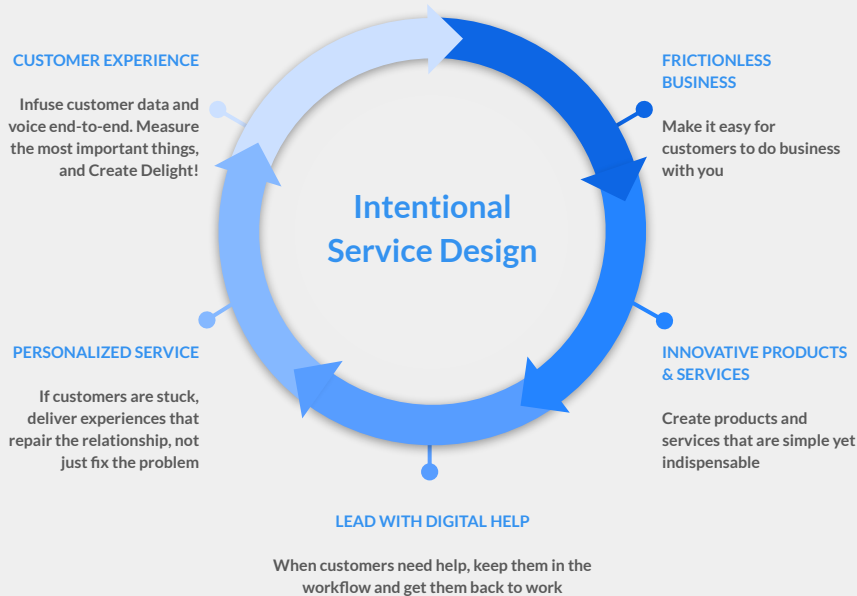
Own and orchestrate the end-to-end service design and transformation for both assisted and unassisted channels

Key Challenge

Problem

- To remain profitable, Appfolio needed to scale the Help Experience to match growth and save expense
- Contacts outpaced capacity resulting in high TRT, declining CSAT, and a growing case backlog
- A fragmented help experience resulted in low Case Deflection Rates (CDR) and unclear resolution paths for customers

Customer Experience Framework



My Role



- Created vision and strategy for the overall Help Experience at Appfolio
- Launched Intercom; owned vendor relationship, implementation, and governance
- Mapped product help experience, developed Holistic Case Deflection Rate (HCDR), streamlined access points

Results & Learnings



Outcomes

- Established company-level OKR for HX with x-functional accountability
- Phased roll-out to 100% within 3 months. Improved CSAT +6pts, TRT +10pts
- Achieved 51% case deflection, avoiding 187K cases, saving \$MM support costs (7X ROI)



What I learned

- Shared Objectives are critical and narratives are a great tool
- Keep it simple for speed. Unnecessary complexity kills progress
- Over-communicate activities, problems, and victories. Influence matters



Why share?

- The objective and challenge is similar, where employees and customers experience pain
- “Success occurs where opportunity meets preparation”, this demonstrates that adage
- I’m proud of the work. Plus, it is enduring. The foundation laid continues today

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03

Project 2: intuit

Pain Elimination Strategy



intuit

Pain Elimination Strategy

Objective:

Establish a data-driven, digital-first approach to reduce contact volume that aligns customer intent with a pain elimination strategy. Key customer experience objectives were to minimize friction, provide choice, and save time.

My Role:

Group Manager, Digital Experience

End-to-end ownership and management of pain elimination for ProTax group



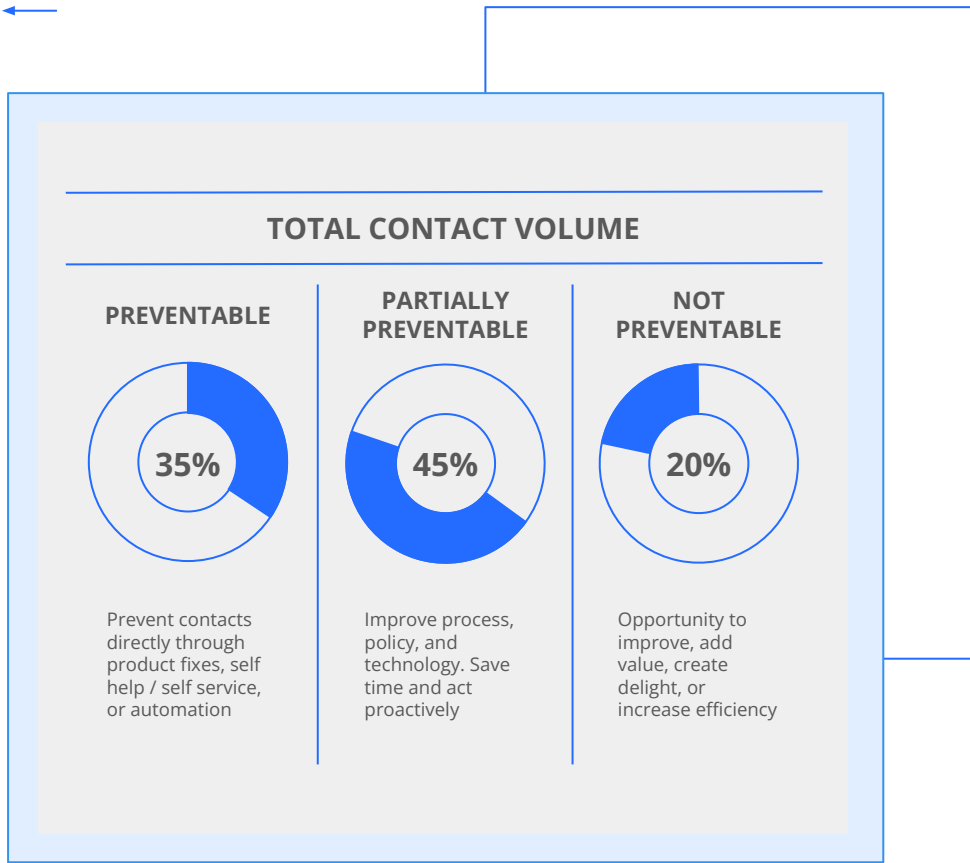
Scenario

Summary:



The Intuit ProTax group needed to increase efficiencies and eliminate customer pain. It faced a classic “death by a thousand cuts” scenario where pain points were varied and mixed.

This led to a patchwork approach of solutions that could not solve a significant chunk of volume.



My Approach



- Developed data-driven strategy to reduce customer friction and eliminate pain points
- Orchestrated the implementation of several key initiatives to reduce contact volume and save time
- Partnered across PM, Engineering, and Ecosystem to set prioritization and deliver solutions

Results & Learnings



Outcomes

- Minimized friction through increased self help volume 2X and community engagement 250%
- Saved time with overall volume reduction of 20% resulting in +\$1.5M savings
- Highly engaged team (96% Employee Engagement)



What I learned

- Be scrappy, but don't fall in love with the solution because change is constant
- Leadership is Influence, and even more critical in a matrixed org
- Articulate the "what" vs. the "how" to set teams up for success



Why share?

- I want to highlight a demonstrated track record of success at Intuit
- This illustrates my leadership ability to rally a tenured team tackle a challenging problem set
- The portability of my framework and approach make it relevant for this role.

04 Craft

Case Study: Group Manager
Supportability



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intuit

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Case Study

Objective:

Transform the supportability operations to significantly improve customer satisfaction, Expert experience, and operational efficiency through a tech-led approach, streamlined processes, and enhanced collaboration with product and technology partners.

Key Results:

- **KR1:** Reduce Multi-Contact Rate (MCR) by 25%
- **KR2:** Decrease Time to Resolution for Product Defects by 30%
- **KR3:** Assess Organization and Leadership Approach

Headwinds and Tailwinds

CHALLENGES AND FAVORABLE CONDITIONS CRUCIAL TO NAVIGATE



Headwinds

- High MCR
- High Escalation Volume
- Long TRT (Total Resolution Time)
- People & Process Errors
- Change management internally



Tailwinds

- Team delivery across core functions
- Team tenure, knowledge, customer obsession
- Appetite to improve the experience
- Leadership support
- Emerging technical capabilities

High Multi-Contact Rates

KR1: REDUCE MULTI-CONTACT RATE (MCR) BY 25%

What

Repeat contacts erode customer trust, push the expense envelope, and add additional layers of customer friction.

The focus here should be two-fold:

1. Partner with Tier 1 service delivery teams to identify root cause for escalations and shore up gaps in process or capability.
2. Identify opportunities within Tier 2, prioritize, and solve these.

High Multi-Contact Rates

NEAR TERM: TACKLE THE PROBLEM

How

Take a customer-back approach. Listen to the people closest to customers and attack the problem together in partnership, holistically

| Partner Downstream | Own the Outcome | Drive Improvement Upstream |
|---|---|--|
| Partner with service delivery teams who touch customers | Empower Supportability teams to solve the challenge | Synthesize data and learning to drive product improvements |
| Evaluate Root Cause <ul style="list-style-type: none">• ID themes• Address process/training gaps• Evaluate handoffs Solution Development <ul style="list-style-type: none">• Leverage tech to drive improvement / consistency• Enhance self help for customers & Experts• Make structural product changes for targeted issues | Walk in the Customer's Shoes <ul style="list-style-type: none">• Journey map the experience• Create KR's that impact outcomes• Find quick wins Bold Advocacy for Change and Process <ul style="list-style-type: none">• Advocate for the customer & Expert with data• Lead by example• Prioritize high-impact issues that lead to repeat contacts and align processes | It's not about me, it's about we <ul style="list-style-type: none">• Build and foster relationships across segment teams• Influence decision making with Problem-Solution-Payoff stories• Keep it simple (OKRs, Issues, Priorities) |

High Multi-Contact Rates

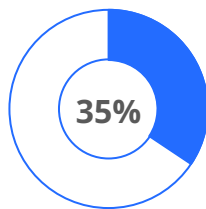
STEP CHANGE: ESTABLISH AN ENDURING STRATEGY

How

Reducing MCR is a marathon, not a sprint. Set the pace by establishing a framework and strategy that becomes second nature for the team

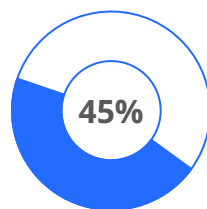
TOTAL CONTACT VOLUME

PREVENT COMPLETELY



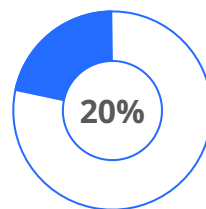
Prevent contacts directly through product fixes, self help / self service, or automation

REDUCE PARTIALLY



Improve process, policy, and technology. Save time and act proactively

REPAIR THE RELATIONSHIP



Opportunity to improve, add value, create delight, or increase efficiency

To scale Live Services, it will be critical for teams to paddle together on the same course and heading.

Achieve goals with an intentionally focused strategy



Investigations Backlog

KR2: DECREASE TIME TO RESOLUTION FOR PRODUCT DEFECTS BY 30%

What



Catching up on an escalation backlog can feel like an undaunting task to teams, while customers continue to experience pain and eroded trust.

At the same time, Product teams are moving with velocity on priority initiatives and likely make trade-offs on current issues that may not be tied to revenue or growth.

We will “Address the Problem Space” of the large backlog from the lens of Friction, Closed Loop Systems, and Ownership

Investigations Backlog

ADDRESS THE PROBLEM SPACE

How

Identify root cause and solution the problem. Be pragmatic with upstream partners. Then set the objective, define key results, and focus on forward progress

| Identify the Friction | Close the Loop | Process Ownership and Communication |
|---|---|--|
| <p>Ask why. Use data and voice to think differently</p> | <p>Circle back with the submitter and customer how they want</p> | <p>If someone doesn't own it, nobody does...</p> |
| <p>Make the complex, simple</p> <ul style="list-style-type: none">• Inventory entry points• Unwind inefficient journeys and processes• Test for priority misalignment and reset expectations <p>Workflow consistency</p> <ul style="list-style-type: none">• Make workflows repeatable and reproducible• Inspect, measure, and performance manage outliers• Leverage / enhance existing tech to enable automation | <p>Keep them informed</p> <ul style="list-style-type: none">• Customers - transparent communication and status• Employees - timely and relevant updates (good and bad)• Product & CX - anticipate when issues spike or hit thresholds <p>Is the feedback mech working?</p> <ul style="list-style-type: none">• If a feedback loop from customers-Experts-supportability doesn't exist, create one• Provide a mechanism to inject feedback into Expert processes to know if it is working | <p>Define clear ownership</p> <ul style="list-style-type: none">• Similar to the MCR challenge, collaboration and buy-in from the team + upstream/downstream stakeholders is critical• Anchor ownership to annual priorities tied to cross-functional input goals |

Organizational Assessment

30/60/90-DAY OBJECTIVES TO BUILDING A TALENT STRATEGY

| Learn | Reflect and plan | Prioritize and execute |
|--|--|---|
| <ul style="list-style-type: none">• Understand the current vision, mission, and goals• Assess organizational structure and culture• Begin evaluating current talent capabilities / gaps• Engage team, stakeholders, customers• Review data, key metrics and deliverables | <ul style="list-style-type: none">• Finalize talent capabilities assessment• Identify key talent and leadership needs / gaps• Review work in-flight and assess ability to deliver• Perform structural analysis to inform strategy• Develop a talent strategy roadmap | <ul style="list-style-type: none">• Implement talent strategy roadmap• Establish and communicate group / team OKRs• Prioritize work to be done (start, stop, continue)• Execute priority initiatives• Set teams free to do great work |

Influencing in a Matrixed Organization

PILLARS OF INFLUENCE x CLIFTON STRENGTHS



My Leadership Style

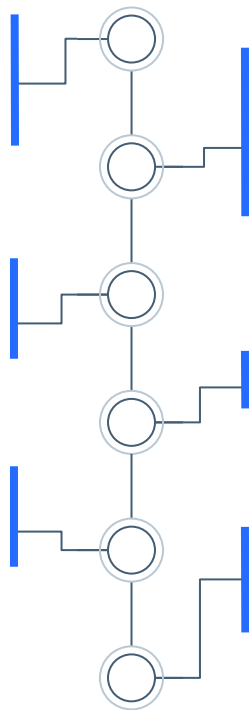
“BE A THERMOSTAT, NOT A THERMOMETER”

Use the "Golden Rule"

"So in everything, do to others what you would have them do to you"

Set clear expectations of what should be delivered and by when (dates & timelines)

Celebrate and give recognition for great effort in both success and failure. Continuous learning is key to growth mindset



Anyone in my org can answer these questions:

- I know where I stand
- I know what is expected of me
- I know what I need to do to improve

Minimize surprises... for leaders, teams, and customers

Elevate visibility of the team. "Be the Megaphone: Amplify and Applaud!"

Where I can have an impact

Communication

starts with knowing Who, then focusing on How

Expertise

to deliver end-to-end customer experiences with a focus on data-driven solutions

Eliminate seams

and bridge gaps between Product, Engineering, and Customer Success

Focus on Digital

help first, leverage genAI and self service workflows to reduce friction

Innovate

with design thinking and rapid experimentation

Scale for growth

by minimizing transactional contacts and maximizing those that build relationships

Thank you...

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