

Project #1: eService Adoption

Background

Citrix invested a considerable amount of resources into improving the online experience for their customers. Even with those improvements, customers were still not engaging with Citrix online as frequently as they should. This study's aim was to investigate why and how Citrix could improve the experience with the goal of increasing case deflection & to help drive adoption.

Research Questions

- What are the barriers to eService adoption for Citrix customers?
- For those who use eService what are they valuing the most?
- Identify what will customer gain from their usage of the eService?
- What is making Citrix customers want to come back to use eService?

Methodologies

User Interviews, Usability Testing, Focus Group, Surveying, Customer Journey Mapping, Persona, Empathy Mapping, Polling.

Persona



Nick

Gender: Male

Location: AMS, EMEA, & APJ

Team Size: 5-12 Members

Experience: 16 Years (Average)

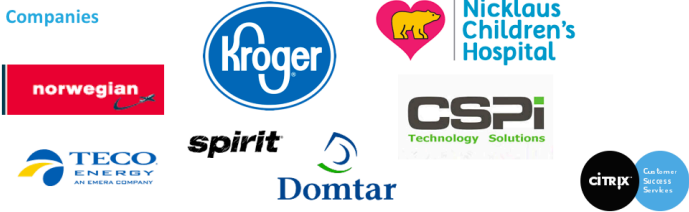
Responsibilities

- Architecting, managing, and troubleshooting their companies core infrastructure.
- Development & implementation of backup and recovery plans.
- Support the application within the Citrix environment.
- Managing, maintaining, patching and upgrading components for Access Gateway, Storefront, Provisioning Services, Virtual Apps and Desktops and VDIs in multiple datacenters.

Entitlements

- Citrix ADC
- Citrix SD-WAN
- Citrix Workspace
- Citrix Virtual Apps & Desktops
- Citrix Content Collaboration
- Citrix Endpoint Management
- Citrix Managed Desktops

Companies



Polling



Citrix User Group Community (CUGC)
@myCUGC



Hey [#myCUGC](#) members—Help Citrix refine the support process by answering a quick poll: How do you prefer to open your support cases?

Online

85%

Phone

15%

100 votes · Final results

11:18 AM · Jul 15, 2019 · TweetDeck

User Feedback

"We usually list the primary contact as email regardless of what you put there you get a callback instead. If I'm not sitting at my desk waiting for a phone call that just delays everything"
(Kroger)



· Jul 15



Replying to @myCUGC

Production down is always a call. Less than that online. What would be nice regardless is to schedule call time when opening a case. Otherwise you play phone and email tag



2

"I've never really had any successful cases that I've opened online. I find that going over the phone provides me with a better response time."
(Commerce Bank)



Johnny Ma @mrjohnnyma · 3h

Replying to @myCUGC

I do both depending on availability. They do tend to call at the most inopportune time if I open online though



"Sometimes the documentation put out is not correct or valid. And that is most frustrating on our part because we are trying to do these things on limited training. We know the documentation is out there, and we try to follow it, and then it doesn't work."
(TECO)

Recommendations

1.) Prioritize eService Response Time	• Restructure the call intake model in Support to ensure engineers are dedicating time to eService cases. • Implement eService metrics into engineers incentive program to help reduce response time.
2.) Improve eService Delivery	• Ensure engineers are honoring customers preferred method of contact. • Update interface to ensure engineers can see customers preferred method of contact.
3.) Improve the Quality of Online Articles & Docs	• Ensure the online content provided to customers matches the issue. • Make additional improvements to the SEO to ensure customers can locate the correct articles that match their problems.
4.) Update the eService Experience Interface	• Update the case management interface to match the new experience.
5.) Engage with other Citrix Departments to express the Importance of eService Adoption	• Engage with the Sales team to ensure that eService is a portion of their correspondence with customers (Onboarding, Support Package Guide) • Engage with Marketing to help promote eService at customer facing events.

Project 2: Citrix Cloud Success Center

Background

The Citrix Cloud Success center launched in November 2019 to aid customers who are making the transition from on-premises to cloud. However, the site has failed to meet its original intended purpose. The site usage rate is low & it is difficult to assess whether the Success Center is truly helpful. This study aim was to investigate why, and what customers would like to see in the second iteration of the site.

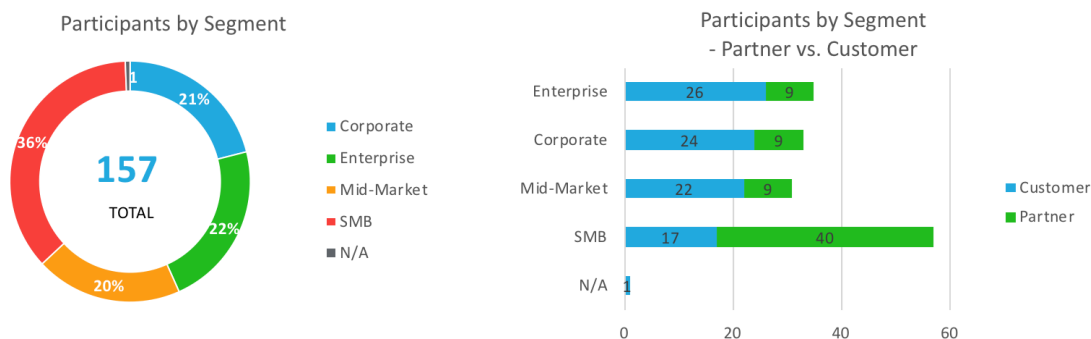
Research Questions

- What are the barriers that are preventing our cloud customers from engaging with the Success Center?
- What are cloud customers overall thoughts and feelings around the Success Center in its current state? Is it truly useful?
- Identify what are the most common ways our on-prem customers are finding content that is important to them online?
- What would customers like to see in the second iteration of the site?

Methodologies

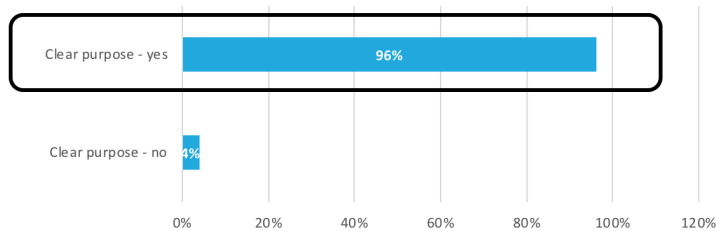
User Interviews, Usability Testing, Survey Design, Customer Journey Mapping, Design Thinking, Empathy Mapping, User Flow, Competitive Analysis, Polling, Prototyping.

Participants



Surveying

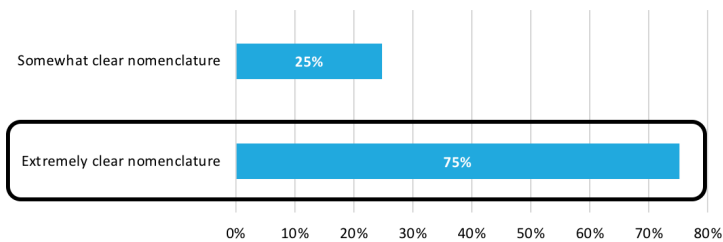
Q1: Do you understand the purpose of the Cloud Success experience tool?



96% of respondents say they understand the purpose of the tool

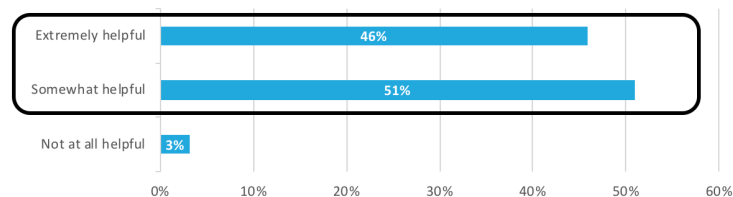
The survey provided an explanation of the tool that won't necessarily be on the site, so once the site is up and running we can continue to explore this with users.

Q2: Was the nomenclature (title names) clear? Was it easy to understand what each step means?



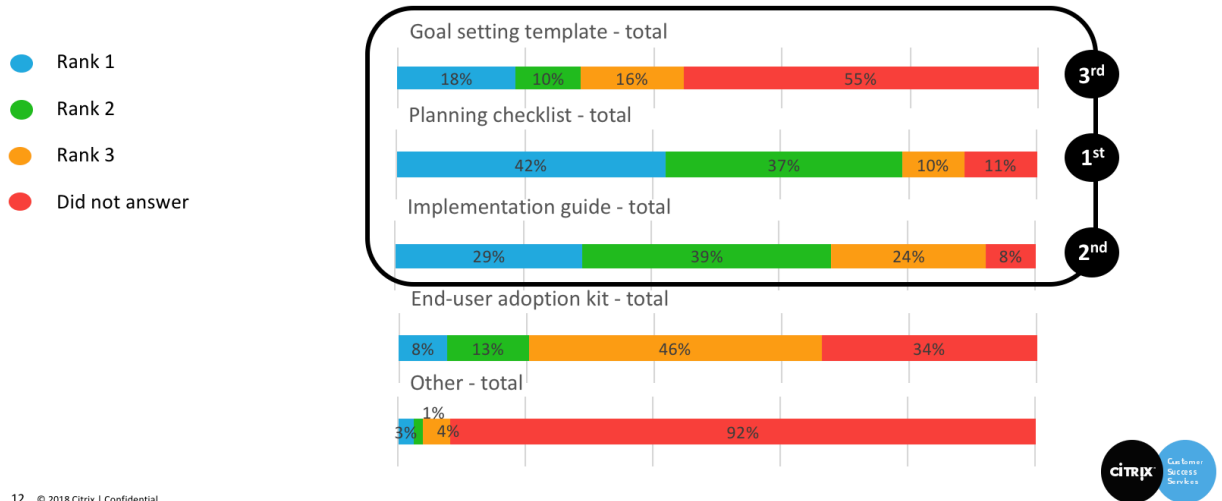
75% of respondents answered the nomenclature is extremely clear

Q3: Do you believe the Cloud Success experience tool will be helpful in your journey to the cloud?



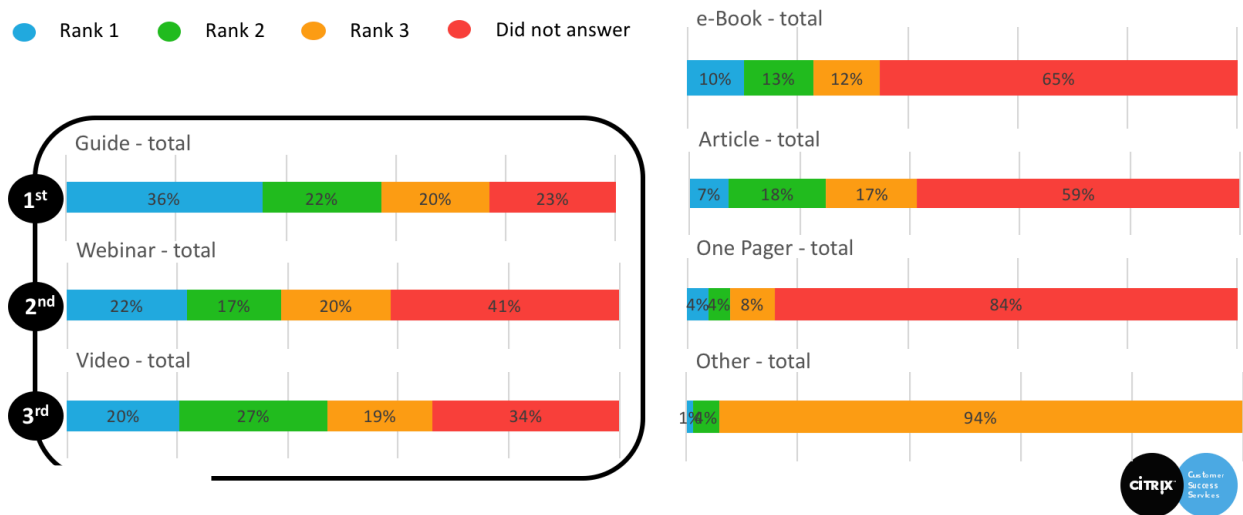
97% of participants said the tool is somewhat helpful (51%) or extremely helpful (46%)

Q4: Specific to your journey to cloud success, please rank the top three (3) assets that are most important to you. (1 being the most important)

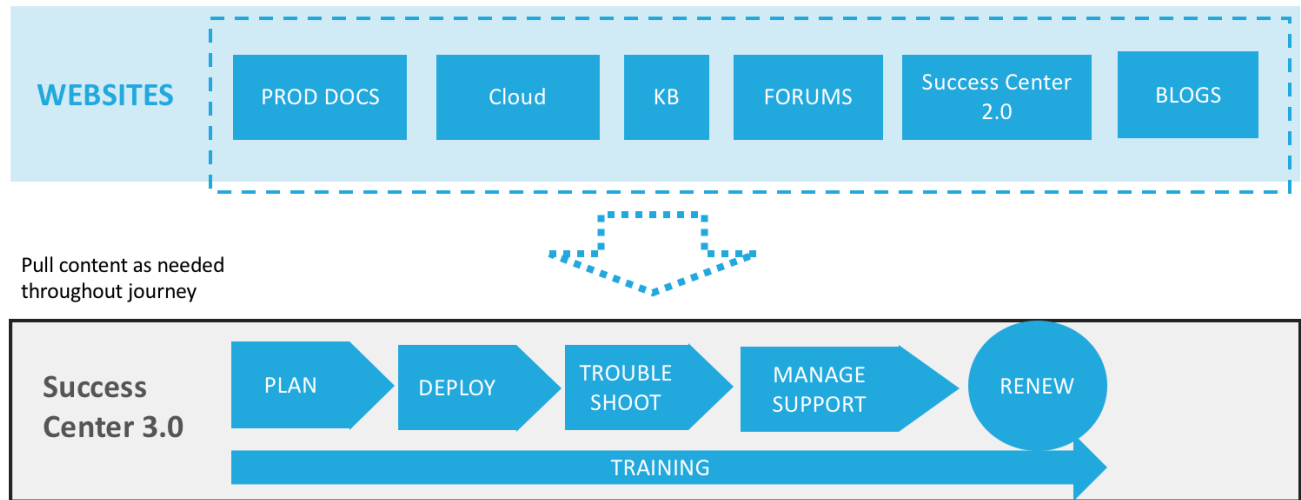


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Q5: Please rank your top three (3) preferred formats to consume educational content? (1 being the most preferred)



Proposed Changes for the Site Second Iteration



Items to Address in Second Version

Topics	Plan	Comments
Migration	Tagged for V2	Ongoing discussion regarding the migration from on prem to cloud - this need to be a priority Currently there is no migration plan in place to execute a full migration.
Application strategy	Tagged for V2	Discuss multizone environment, the solution is always going to be hybrid no matter what, it's never a full cloud solution. .
Troubleshooting guide	Tagged for V2	Need to engage more with support, add a troubleshooting guide under the manage tab.
Operations guide	Tagged for V2	Configuration concerns. Will need to be added after the infrastructure is built , under manage.
Infrastructure Naming	Tagged for V2	Find comparable name in cloud that is more narrow, so we may leave it as infrastructure.
App configuration	Tagged for V2	Increase application publication.
Monitoring and Analytics	Tagged for V2	Report enhancements to meet the needs other partners & other contributors.

Project 3: Salesforce Lightning

Background

One of the flight plan items for the Self-service & Analytics team for 2020 was to increase technical support engineer's productivity while using Salesforce Lightning. This study's aim was to speak with engineers to identify pain points and concerns in Salesforce Lightning with the goal of improving their daily productivity.

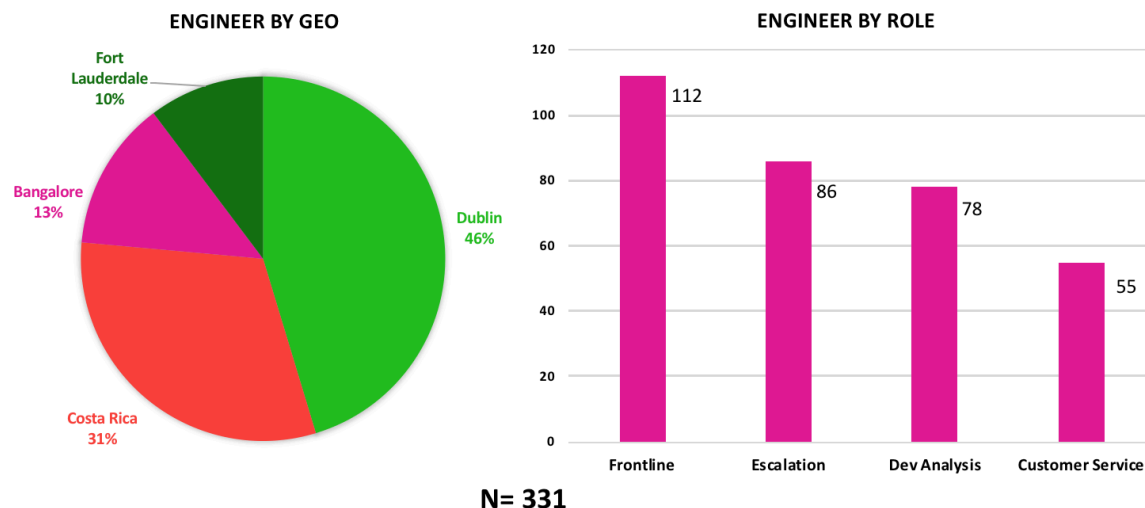
Research Goals

- Identify areas where we can increase & maintain engineer productivity.
- Understanding where engineers are spending their time and which processes/steps are most critical to them.
- Identify tasks/actions taken in Salesforce that are affected by low performance, then link those to a business impact.
- Reduce layout complexity & identify what areas can be removed or must be kept.

Methodologies

Shadow Sessions, User Interviews, Task Analysis, Survey, Journey Mapping, Heatmapping.

Participants



Areas to be Addressed

Case
Creation
Process

- Separate case detail
- Case Queue reduction
- Auto-fill options
- Field reduction

Workflow

- Case Owner
- Cloning Cases
- Situational Appraisal
- Escalation templates
- Web-to-case
- Case Closure

Performance
Concerns

- Loading errors
- Octane score improvement
- ATT browser connectivity concerns

Layout
Improvements

- Icon clutter
- Age of case display
- Character limits
- Image resolution
- Quick links

Search
&
Knowledge

- Unified intelligent search
- Improve product docs.
- Search relevance

Additional Projects

Tableau Dashboard Improvement

Tasked with conducting user research to improve the quality of Tableau dashboards on the Citrix Supportability site. The goal was to make the data load faster, be more relevant to individual roles, and help drive better business decisions.

Content Migration - Adobe Experience Manager

All of Citrix online support articles were housed and authored in Adobe Experience Manager. Once AEM reached end of support it was a security concern to have that information housed there. Therefore, all of the content needed to be migrated into Salesforce. I collected all of the new template requirements from all of the stakeholders & created the new templates. As well as, coordinated all of the user acceptance testing on the new Salesforce templates.

Citrix Insights Services

Map out & understand the customer journey of customers uploading technical support bundles using Citrix Insights Services. Understand what their expectations are for this service, and what is missing currently with the service.

Technical Support Chatbot

Citrix launched their technical support chatbot in July 2020, I was tasked with collecting insights for customers to better understand their experience using the Chatbot.

Procter & Gamble

Build out a research enablement tools for sales engineers to leverage during the pre and post sales journey. As well as, collect customer insights from multiple Procter & Gamble use case customers on their experience using Citrix Cloud Virtual Applications & Desktop services.