

KUMBAY AWESOME

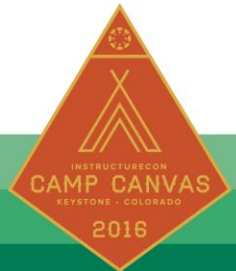
SETH JOHNSON

# CUSTOMER SUCCESS UPDATES



# OVERVIEW

- CUSTOMER SUCCESS OVERVIEW
- COMMUNITY UPDATES
- CUSTOMER SUCCESS MANAGEMENT UPDATES
- DOCUMENTATION UPDATES
- SUPPORT UPDATES





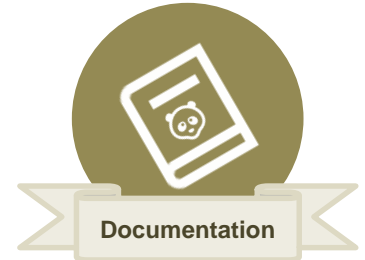
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# CUSTOMER SUCCESS

- ABOUT CUSTOMER SUCCESS
  - CUSTOMER SUCCESS MANAGEMENT
  - SUPPORT
  - COMMUNITY
  - DOCUMENTATION
- CS TOP 10 PROCESS

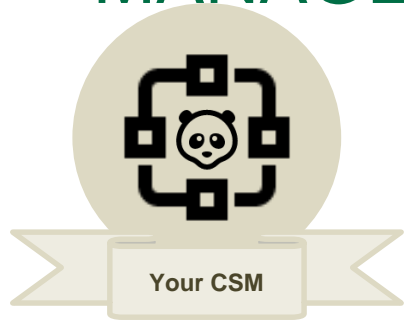


# WHEN WE SAY “CUSTOMER SUCCESS” ...



# ABOUT CUSTOMER SUCCESS MANAGEMENT

Your advocate and main point of contact with Instructure



- With you for the long haul
- Frequent, regular contact
- Scheduled meetings and ad hoc discussions
- Your all-access pass
- **Executive business reviews**

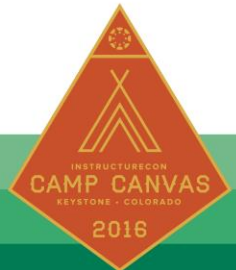


# ABOUT SUPPORT



## Your anytime resource for individualized help with Canvas

- Answers for how-to questions
- Help troubleshooting issues and bugs
- Info about downtime / performance
- Available 24/7/365
- 100% Instructure employees



# ABOUT COMMUNITY



## A place to find helpful knowledge, resources, and peers

- Connect with like- and unlike-minded peers
- Find official help resources like Guides and videos
- Discover peer-contributed answers and best practices
- Help shape Canvas by sharing ideas
- See what's coming soon
  - Release notes
  - Roadmap insights in the Studio





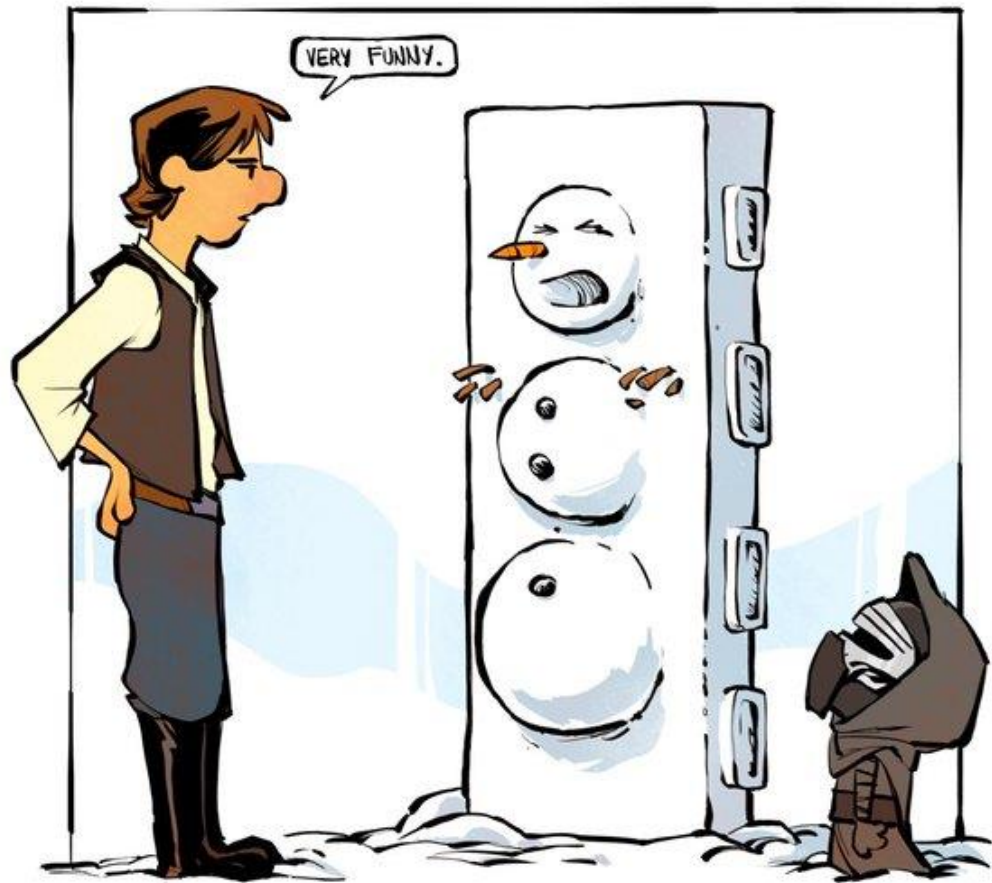
# ABOUT DOCUMENTATION



## The source of official Canvas product documentation

- Creates and updates Guides and videos
- Prepares and manages release notes
- Always current





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# CS TOP 10

One team; different perspectives on issues and needs



CSM

- Institution-centric view; informed by your goals



Community

- User-centric view; informed by individual perspectives



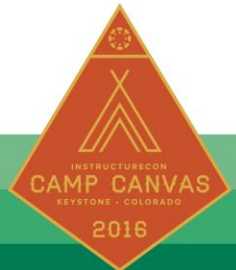
Implementation

- Function-centric view; focused on first-100-days issues



Support

- Issues-centric view; informed by questions and tickets



# CS TOP 10



CSM  
Top 10



Community  
Top 10

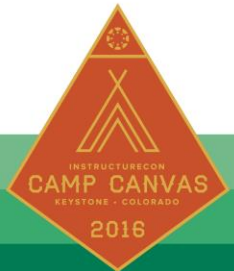


Implementation  
Top 10

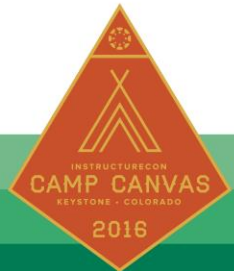


Support  
Top 10

Customer  
Success  
Top 10



# CS TOP 10 (cont'd)



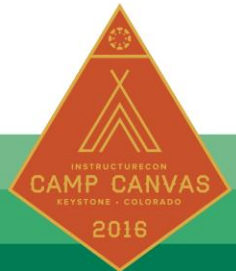


I WILL FINISH  
WHAT YOU STARTED.

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# COMMUNITY

- THE NEW COMMUNITY, ONE YEAR ON
- FEATURE IDEA PROCESS



# THE NEW COMMUNITY, ONE YEAR ON

The screenshot shows the Canvas Help Center interface. At the top, there's a navigation bar with 'HOME', 'CANVAS COMMUNITY', 'CANVAS GUIDES', 'RELEASE NOTES', 'MANAGE', and 'SETTINGS'. Below this, a user profile for 'Seth Johnson' is displayed with statistics: 'Open Tickets (current)' showing 2 New and 113 Closed; 'Ticket Statistics (this week)' showing 0 Closed and 0 Solved; and 'Satisfaction Statistics (90 days)' showing 93% Help-Desk. A 'Hi Seth!' message and 'Welcome to your Support Center' are visible. The main content area is titled 'How can we help you' and features four cards: 'Canvas Guides' (Find answers to common questions), 'Ask the community' (Get help from a Canvas expert), 'Feature Discussions' (Have an idea to improve Canvas?), and 'File a Ticket' (Let us know if Canvas misbehaves). On the right, a 'Ticket Info' sidebar lists various ticket categories and counts, such as 'L1 Tix (88)', 'Tier 1 (6)', 'New Tickets (-10)', 'FFT (9)', 'Tier 1 Stanford Wrong Queue (-3)', 'No Assignee Tickets (-20)', 'My open tickets (-2)', 'My unsolved tickets (-400)', 'New tickets in last 24 h (-13)', 'New L1 Tix (27)', 'Rated tix - last 30 (-600)', 'Suspended tickets (62)', and 'More +'. Below this is a 'My views' section with a list of filters like 'tix last month: Tier 1 (-1990)', 'tix last month: Premium (-1600)', 'tix last month: Basic (-600)', 'Canvas Network tix - oyrllc (-400)', 'All my tix (-400)', and 'CSAT surveys sent (-0)'. At the bottom, there's a 'Help Center' section with a link to 'Guidelines & Tips to Use the Canvas Community'.

BEFORE

The screenshot shows the redesigned Canvas Help Center interface. At the top, there's a navigation bar with 'Home', 'Answers', 'Ideas', 'Groups', and 'Browse'. Below this, a large banner features a photo of Don Bryn and the text 'Don Bryn takes Canvas to the next octave...'. A search bar is prominently displayed with the text 'SEARCH THE COMMUNITY...' and a 'GET STARTED' button. Below the search bar, there are three main action buttons: 'FIND ANSWERS' (with a question mark icon), 'SHARE IDEAS' (with a lightbulb icon), and 'JOIN GROUPS' (with a group of people icon). The bottom section is titled 'FEATURED PLACES' and lists three featured items: 'Canvas Guides' (Public documentation for the Canvas LMS and mobile-related products), 'CanvasLIVE' (This is where Canvas comes to life! Watch webinars, participate in courses, and create resources for all!), and 'Canvas Engagement Strategies' (Share tips, tricks, assets, and strategies to optimize Canvas rollout, training, and continued adoption). Each item has a corresponding icon and a brief description.

AFTER

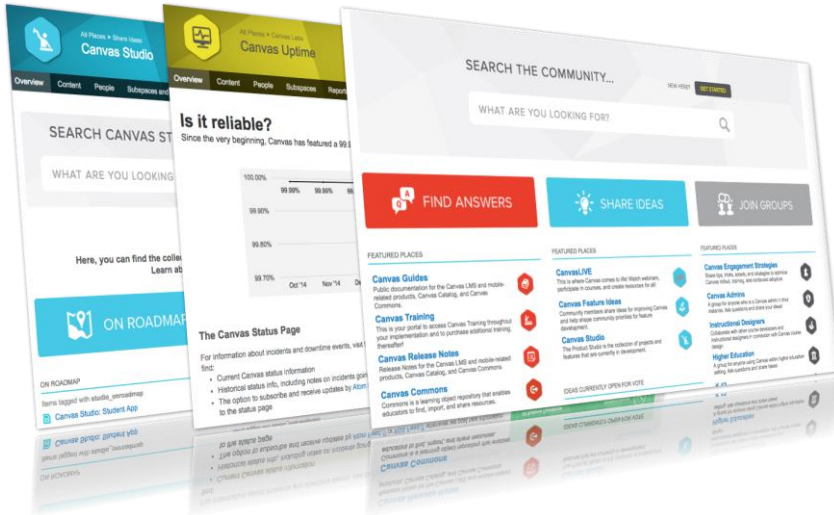




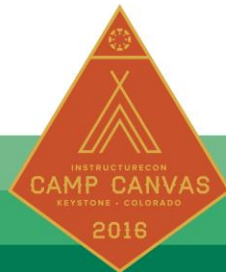
# NEW COMMUNITY, ONE YEAR ON (cont'd)

## Highlights

- **75k** users with accounts
- **430** groups and spaces created
- **65** live events facilitated
- **5,200** questions posted
- **4,000** ideas submitted and **75k** votes cast
- **275** ideas with 100+ votes

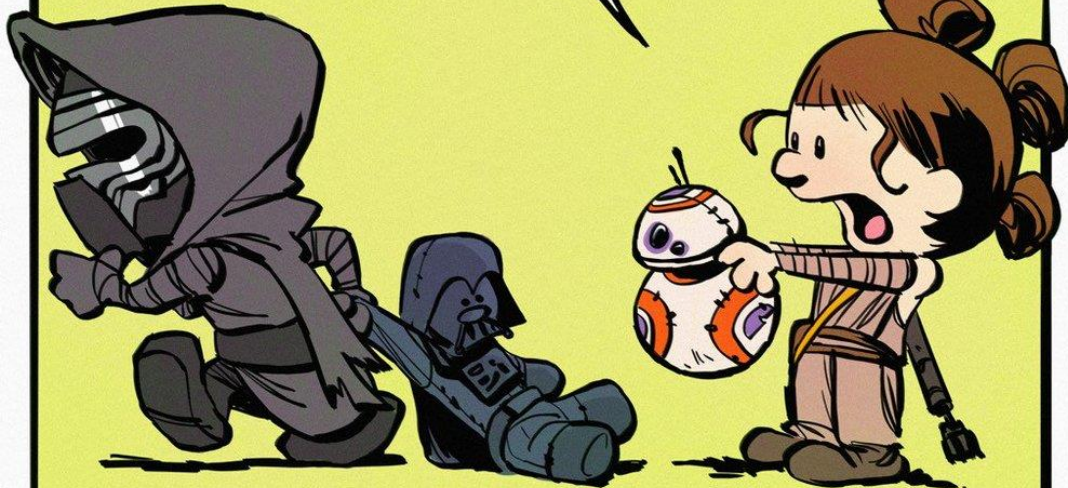


# FEATURE IDEA PROCESS



THIS IS  
STUPID.  
I'M LEAVING.

I DON'T SEE WHY YOU'LL  
PLAY PRETEND WITH YOUR  
DUMB OL' SITH LORD  
BUT NOT WITH MR. BB-8!



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# CSM

- EXECUTIVE BUSINESS REVIEWS
- SEMIANNUAL ADMIN SURVEYS



# YOUR CSM AND YOU

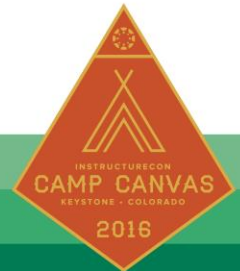
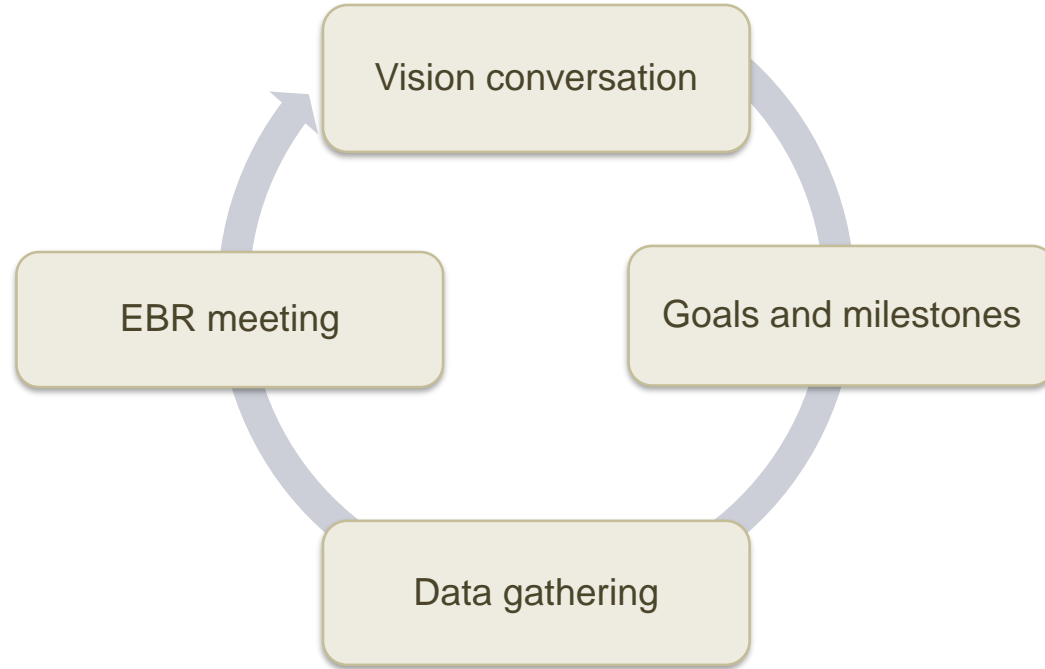


# EXECUTIVE BUSINESS REVIEWS

- New for 2016
- Big picture:
  - How do you see Canvas helping you achieve your teaching and learning goals (**A**)?
  - How's it going so far (**B**)?
  - How can we help narrow the gap between **A** and **B**?



# EXECUTIVE BUSINESS REVIEWS



# EXECUTIVE BUSINESS REVIEWS

- Vision conversation
  - The better we understand you, the better we can serve you
  - Questions like:
    - What are your teaching and learning goals?
    - How do you see Canvas supporting these?
    - How would you define success in terms of your learning management system (specifically, adoption and usage)?
    - What technology initiatives does Canvas support?





# EXECUTIVE BUSINESS REVIEWS



- Goals and milestones
  - Based on findings, what do you want to accomplish with Canvas in the next six months?
  - How can we help?
    - What professional services might we provide?
    - What can we change about how we support you?
    - What problems or features should we prioritize?
    - What items on our roadmap might affect your goals?



# EXECUTIVE BUSINESS REVIEWS

- Data gathering
  - CSM collaborates with the Business Intelligence team
  - Data include:
    - Active users
    - Course activity (# of discussions, assignments, pages, quizzes)
    - Top users / courses based on page views
    - Trend over time



# EXECUTIVE BUSINESS REVIEWS

- EBR meeting
  - Ideal attendees
    - LMS admin(s)
    - Director- or C-level, if the admin isn't one of these
    - CSM
  - Agenda
    - Review vision conversation findings
    - Present and review report
    - Summarize findings
    - Update goals and milestones



# SEMIANNUAL ADMIN SURVEYS

- Administering twice a year now (down from three times)
  - April
  - October
- So, so important
- Responses thoroughly reviewed
- Thank you!

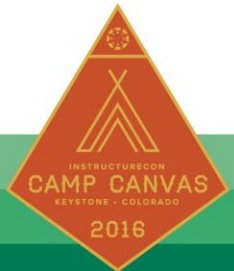




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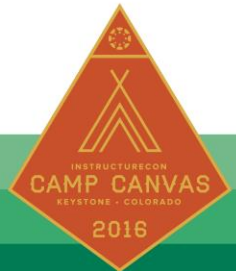
# DOCUMENTATION

- FAST FACTS ABOUT THE GUIDES
- GUIDES IN NEW LANGUAGES
- EMBEDDABLE GUIDES



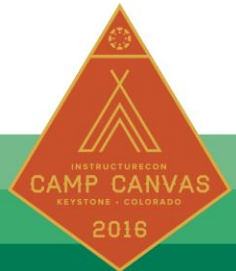
# FAST FACTS ABOUT THE GUIDES

- 1,200 articles
- 1.5 to 3 million page views per month (seasonal)
- Top five articles:
  1. Which browsers does Canvas support?
  2. How do I find my institution's URL to access Canvas apps on my mobile device?
  3. How do I submit an online assignment?
  4. How do I set my notification preferences?
  5. How do I submit a peer review to an assignment?



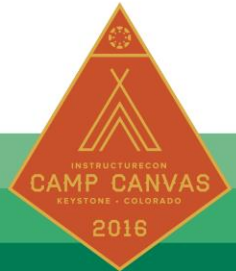
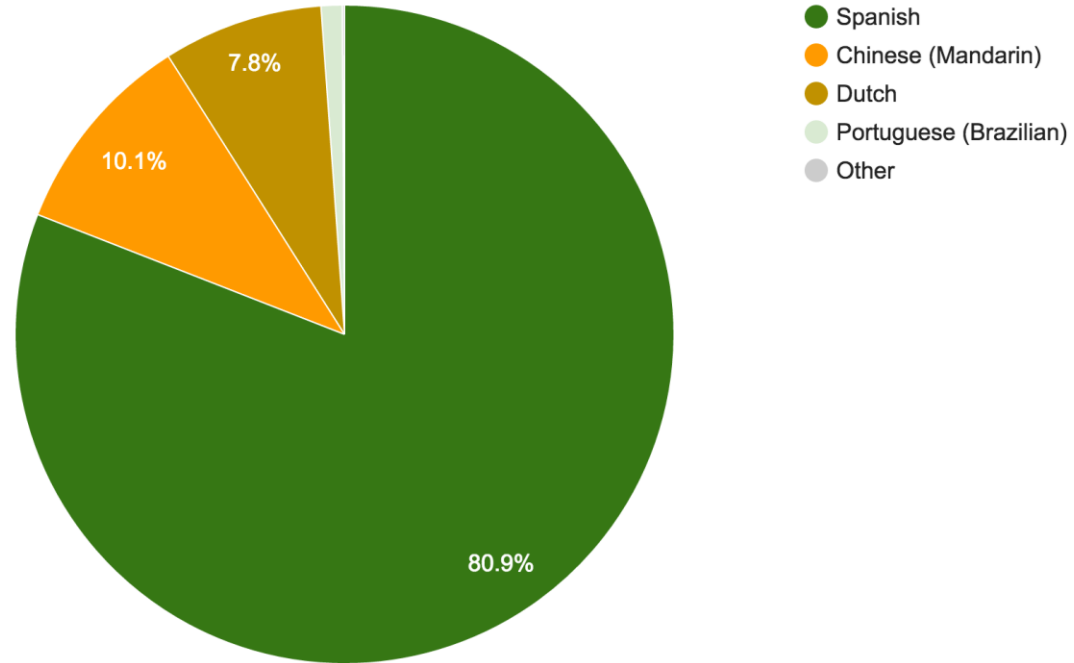
# GUIDES IN NEW LANGUAGES

- Available now
  - English
  - Spanish
  - Mandarin
  - Dutch
  - Swedish
  - Danish
- Coming soon
  - Brazilian Portuguese
  - European French
  - German



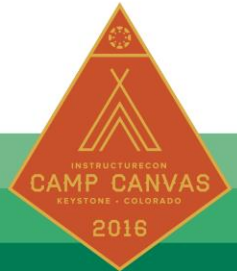


# GUIDES PAGE VIEWS BY LANGUAGE



# EMBEDDABLE GUIDES

- Y'all like embedding Guides in things (we learned)
- We plan to keep that possible for the foreseeable future
- Tools not playing nicely together right now, but we'll figure it out



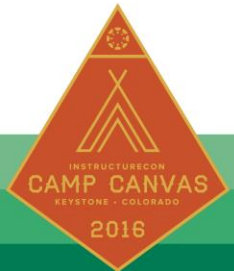


Y'KNOW, HE GETS THIS  
FROM YOUR SIDE OF  
THE FAMILY.

KESINGER

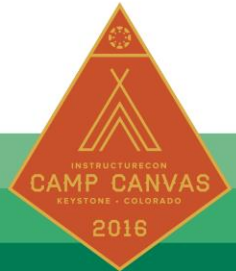
# SUPPORT

- PROCESS AND TOOLS UPDATES
- SERVICE CLOUD TRANSITION
- SERVICE CLOUD UPDATES



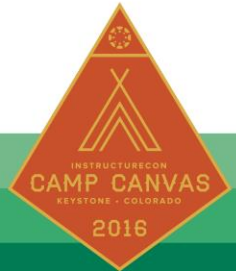
# PROCESS AND TOOLS UPDATES

- Improved phone-system connector
  - Auto-creates, auto-assigns phone cases
  - Self-service reporting on average speed to answer coming soon
- New live chat tool
  - Auto-creates, auto-assigns chat cases
- Updated case dispositions
  - Improves process of applying dispositions
  - Improves reporting

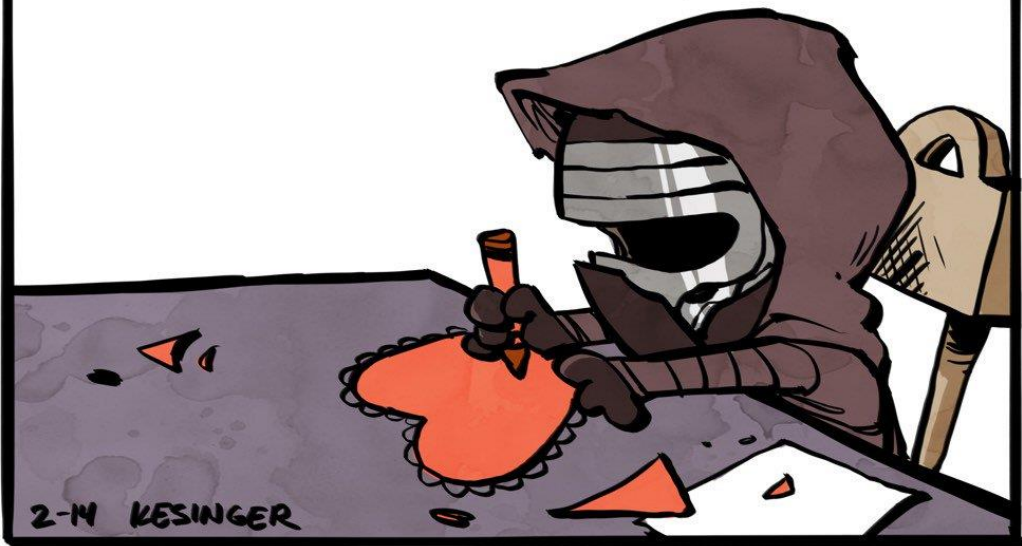


# SERVICE CLOUD TRANSITION

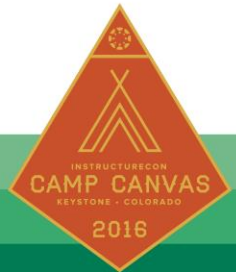
So... about that...



REy.  
i HatE you. dRop  
dEad.  
Kylo

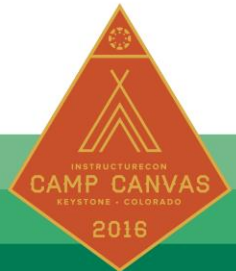


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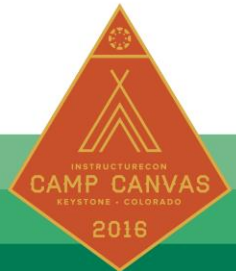
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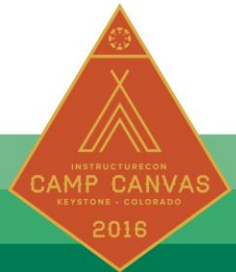
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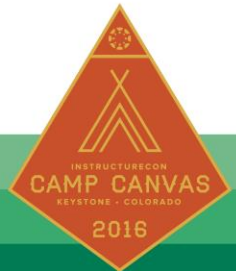
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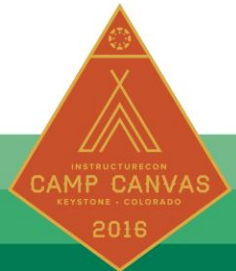
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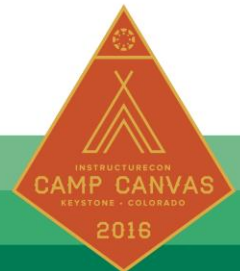
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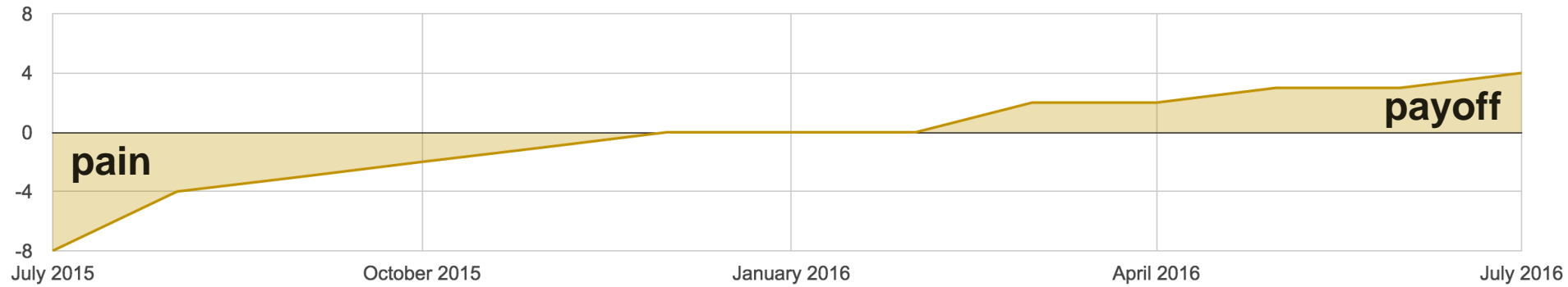
# SERVICE CLOUD TRANSITION



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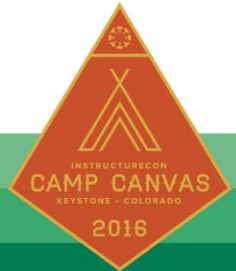
**Critical  
fixes**

**Climbing toward parity**

**Parity**

**Betterment**

**Now**

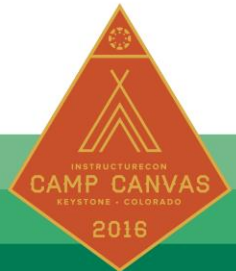




# SERVICE CLOUD UPDATES

## New features

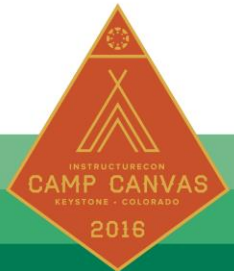
- Mass update
- Macros
- Service Cloud account settings access for admins



# SERVICE CLOUD UPDATES

## Macros

- Make a set of changes to a case with one click
- All or some of:
  - Change owner
  - Update status
  - Update Canvas Component fields
  - Add comment



# SERVICE CLOUD UPDATES

Name

Transfer To

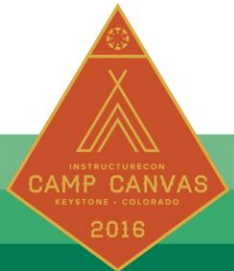
Status

Canvas Component Affected

Canvas Component Issue

Chatter Comment

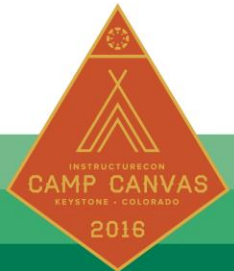
**B** *I* U **S**



# SERVICE CLOUD UPDATES

## Mass update

- Update up to 200 cases at once
- Some or all of:
  - Change owner
  - Update status
  - Set or update Canvas Component fields
  - Add comments
- Can use macros



# SERVICE CLOUD UPDATES

New Cases   Open Cases   Pending Cases   On Hold Cases   Solved Cases   Macros

Mass Update

<input type="checkbox"/>	Case Number ▾	Subject ⇅	Case Creator ⇅	Case Owner ⇅	Date/Time Opened ⇅
<input checked="" type="checkbox"/>	01323688	Test Case	replace.me@example.com	Bertram Wooster	7/13/2016 2:36 PM
<input checked="" type="checkbox"/>	01323583		replace.me@example.com	Jeremy's Admin	5/4/2016 1:37 PM
<input checked="" type="checkbox"/>	01323582		replace.me@example.com	Jeremy's Admin	4/29/2016 9:16 AM



# SERVICE CLOUD UPDATES

Transfer To: Bertram Wooster

Status: New

Canvas Component Affected: Admin

Canvas Component Issue: "How to" Question

Chatter Comment

Please attach a screenshot.

Cancel Save changes



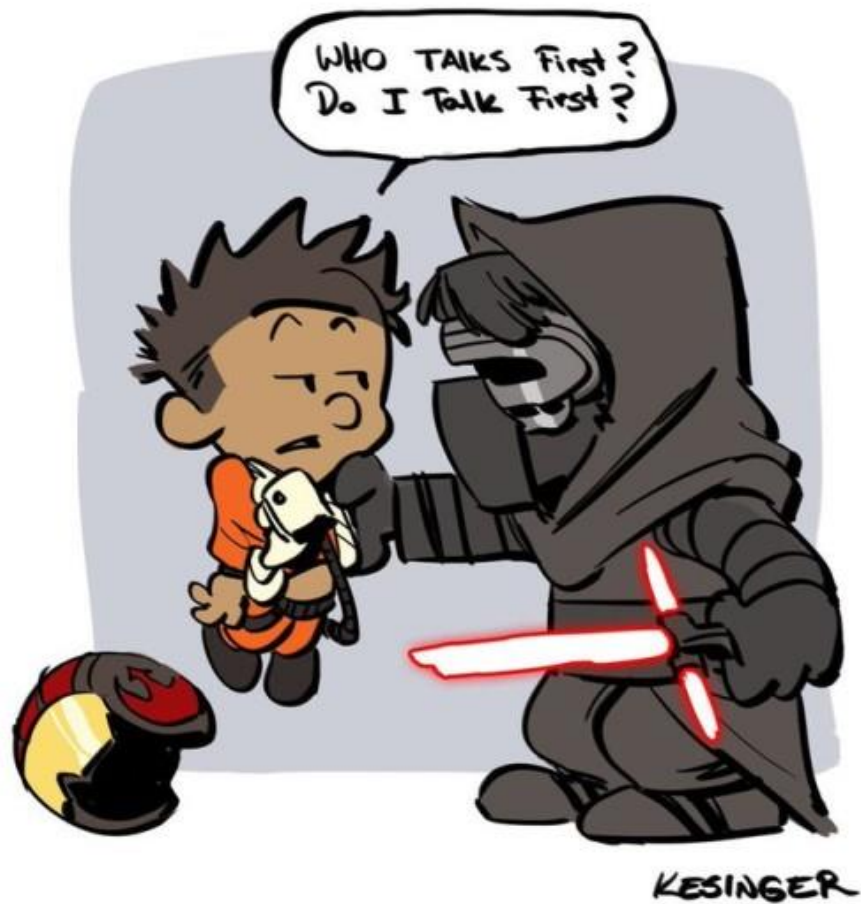
# SERVICE CLOUD UPDATES

## Service Cloud account settings access for admins

- Will let you:
  - Set case-routing pattern
  - Add and manage field admins
  - Select notifications you and your users receive; customize notifications
  - Designate addresses to be copied on every ticket

**Available  
before  
Fall Start**





WHO TALKS First?  
Do I Talk First?

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KUMBAY AWESOME

# Q&A



