



Mvelopes by Mastercard gives customers peace of mind after a bad release

A new product release, escalations and how being there at a customer's worst moment with your product can save your reputation.

Customer: Mvelopes
Customer Website: www.mvelopes.com
Industry: Finance
Organization Size: Small/Medium
Country: USA
Partner: Atlassian
Partner Website: <https://www.atlassian.com/>

Executive summary

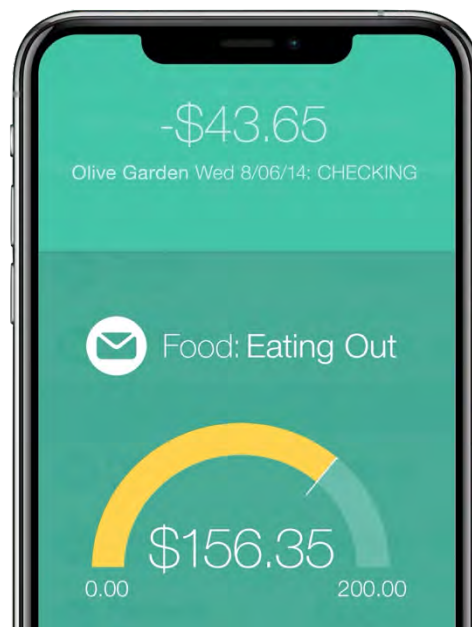
Mvelopes is a software as a service (SaaS) budgeting app, owned by Mastercard®, that gives consumers a simple way to plan and track monthly spending. Since its launch in 2001, it's been used by about 750,000 people.

In early 2020, the company switched its customer service support solution from one industry giant to another. They made the move to Atlassian's Jira Service Management (JSM) platform, which fit their needs better but did not have native customer-engagement solutions.

To improve the customer chat experience, Mvelopes selected PingPilot. PingPilot integrates with JSM, allowing Mvelopes to better address any potential volume spikes in customer inquiries. Mvelopes Product Director Wes Shelnuitt says they saw an improvement in the way they were able to handle customer inquiries immediately upon implementation. "With PingPilot's chat function, our team can often get many issues resolved right away," Shelnuitt explains.

"The customer feels heard because we're talking to them right away rather than putting them into an elevator-music-filled hold queue.

It reduces the overall volume so that our backlog doesn't build up." When a surge in support volume hit, due to a migration, Mvelopes worked hand in hand with PingPilot to optimize their engagement strategy and build new features to help them handle the influx.



Trial by Fire

Bugs can be an unfortunate fact of life for consumer-focused providers of software as a service (SaaS).

Wes Shelnutt, a Product Director for Finicity, recalls what happened when a migration had the kind of customer service impact every product owner of a SaaS company dreads.

Although customer data was always secure, the bug in a new migration update was causing customers to temporarily lose access to the personal accounting data they had built up, sometimes over many years. Support requests skyrocketed from 50 or so per day to ten times that, with six agents trying to handle over 500 inquiries a day.

Using PingPilot's chat function helped relieve some of the strain. "With chat, they could often get the issue resolved right away," Shelnutt explains.

"The customer feels heard because we're talking to them right away rather than putting them into an elevator-music filled hold queue. So, it reduces the overall volume so that our backlog doesn't build up." But even that wasn't enough as the growing support requests were relentless and now, they were dealing with the challenge of the chat queue backing up to as long as an hour.

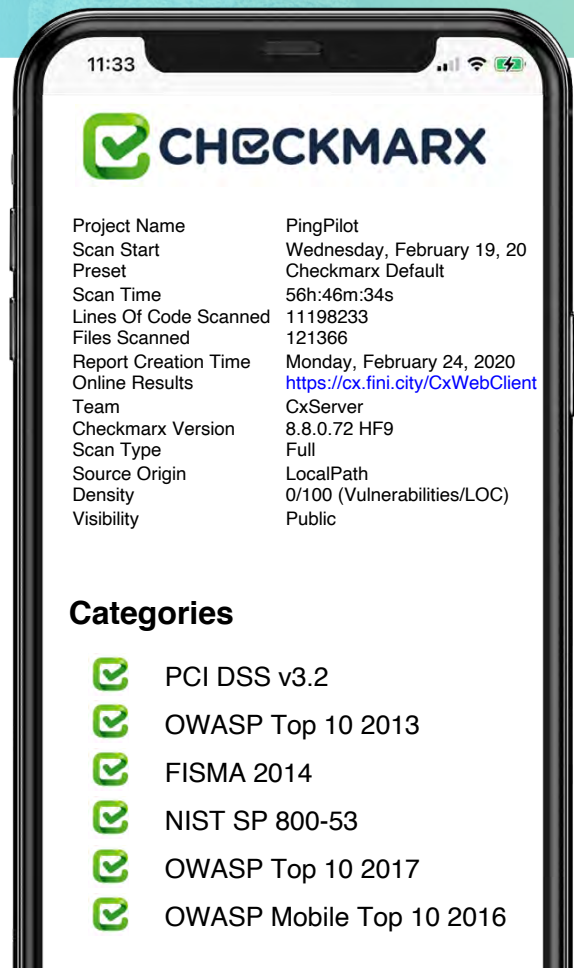
Soon after they implemented the chat solution, Mvelopes was working hand-in-hand with PingPilot to optimize their engagement strategy and build some new features that helped them handle the surge in volume.



Feature requests on the fly

Swapnil Nakwha is a senior systems admin at Mvelopes and oversaw the stand-up and rollout of JSM and PingPilot. “The initial integration was as simple as it can get,” he recalls. He and two members of the PingPilot team ran a training session right before the first live support shift with it and then monitored the initial use. The PingPilot team was also alongside them at every step as they looked for solutions to further improve. “PingPilot was always approachable and open to ideas, and willing to work on them immediately,” Nakhwa says.

As Mvelopes’ needs evolved, so did their PingPilot solution. They implemented a new customer engagement strategy that takes advantage of PingPilot’s proprietary “Ping Signals”.

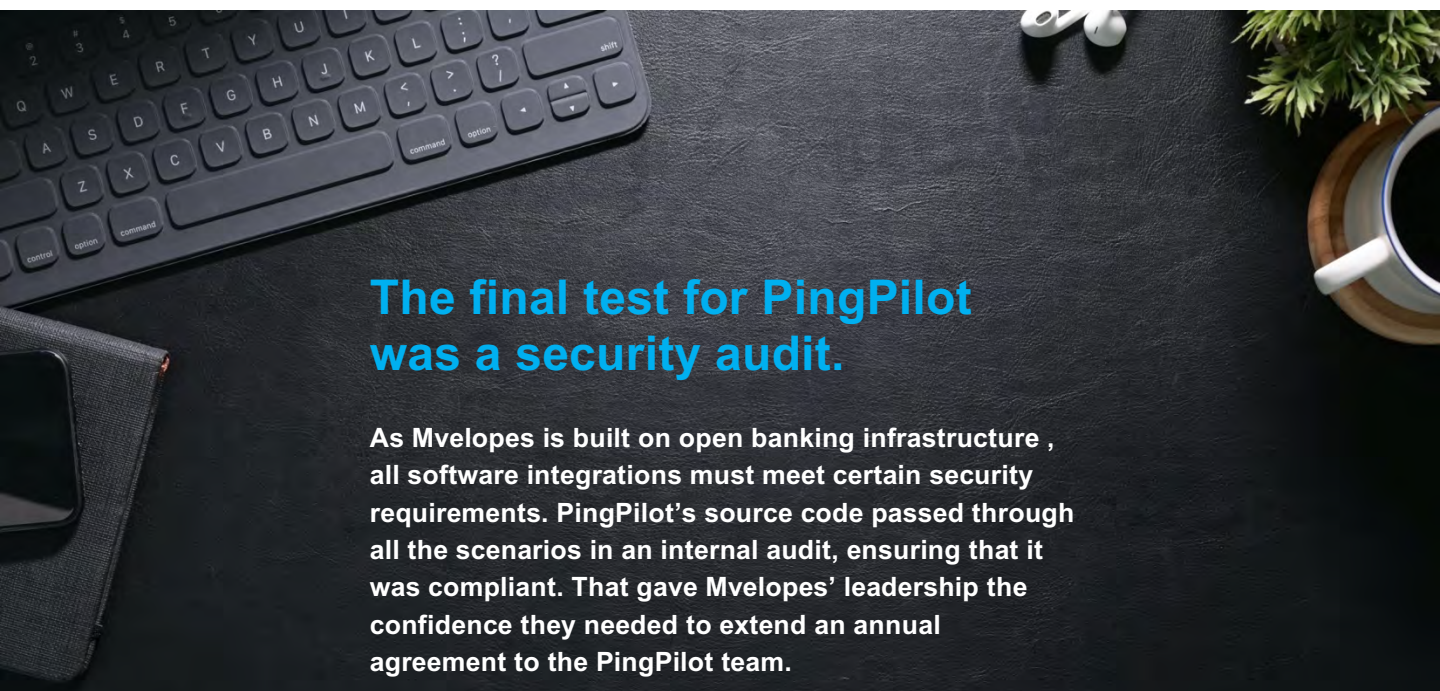


To improve the experience of customers waiting in front of the computer for their turn to chat, the Pings allow customers to begin a chat in a browser window and seamlessly switch over to SMS at their convenience. Customers can step away from the computer without interruption while waiting in the chat queue or even in the middle of a service interaction.

The flexibility of not being tethered to the computer provides a pressure relief valve, making all the difference in customer sentiment. With 30,000–40,000 messages coming and going every month, that difference means a lot.

Before they would execute an annual agreement, the Mvelopes team had quite a few feature requests. PingPilot worked with the Mvelopes team to address all of them.

To handle any potential influx of customer inquiries, they created a dynamic capability for customer service agents to engage in multiple chats at once. To protect the quality of customer service, they set the maximum number of simultaneous chats to match the agent's seniority; speed is optimized while nobody takes on more than they can handle. PingPilot also built out more complicated updates for Mvelopes, like creating a simple interface to attach chat transcripts to a JSM ticket with just a few clicks while keeping the UI clean and easy for the agent to handle, even with those multiple chats open.



The final test for PingPilot was a security audit.

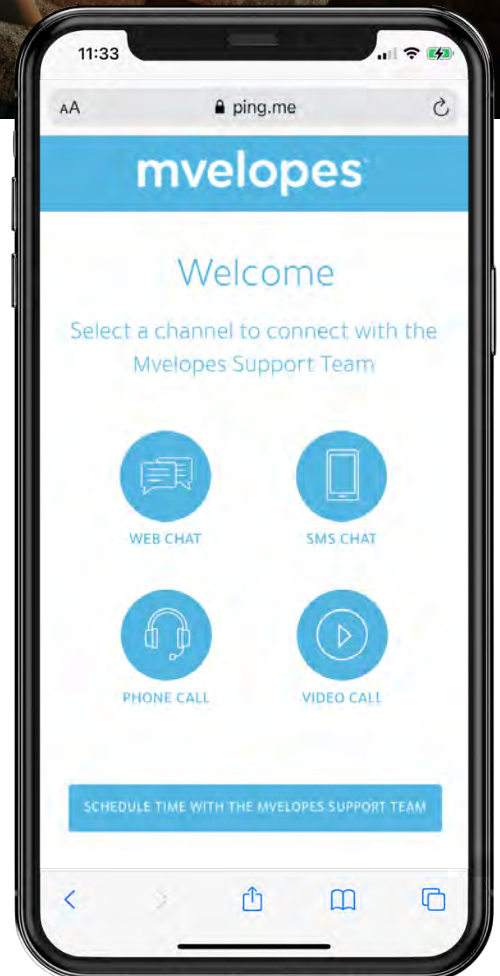
As Mvelopes is built on open banking infrastructure, all software integrations must meet certain security requirements. PingPilot's source code passed through all the scenarios in an internal audit, ensuring that it was compliant. That gave Mvelopes' leadership the confidence they needed to extend an annual agreement to the PingPilot team.

Peace of mind on both sides

“Squashing bugs and getting
the help people need”

Many of Mvelopes’ incoming callers don’t actually need tech help, they often have relatively simple inquiries that feel understandably urgent since they concern their personal finances.

With PingPilot in place, “We’re able to explain any problems and give them peace of mind,” Shelnut says. And empowering those customers to engage in the channel of their choice helps concerned customers feel like their voices aren’t just heard, they’re being listened to and empathized with.





Looking ahead, Mvelopes is now expanding its use of PingPilot from only SMS and chat to include telephony and video.

In addition to video calling, PingPilot's web conferencing and screen-sharing capabilities are attractive for customer troubleshooting. Screen sharing will be an important tool for resolving those not-so-simple technical challenges that benefit from having an engineer watch the customer walk through their issue live.

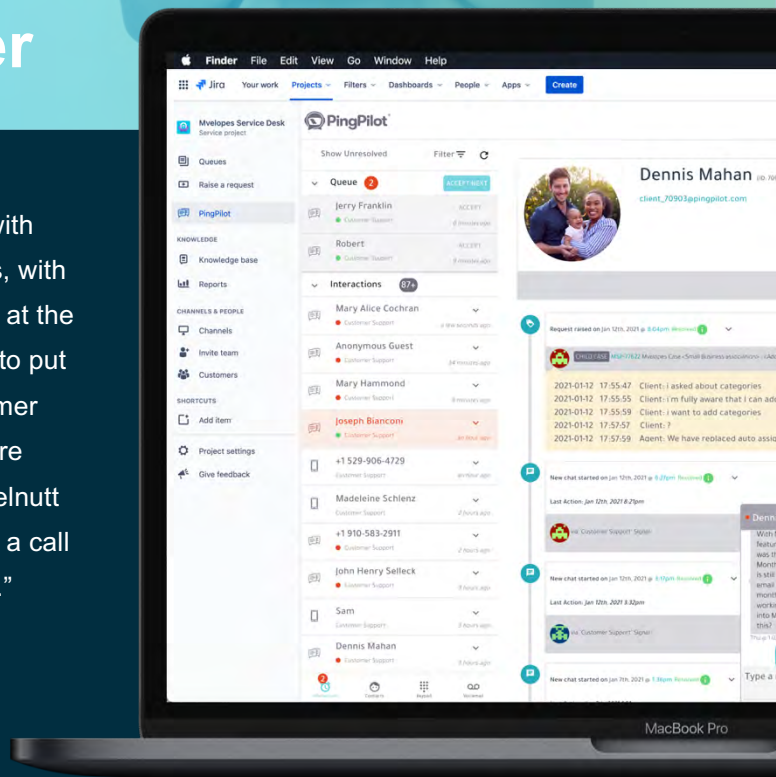
On top of all the customer-facing features, the Mvelopes team says one of the best things about working with PingPilot has been the sense of partnership. "They were literally on call for us," Shelnuttt says.

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Trust at the Center

Nakhwa particularly appreciates the speed with which PingPilot responds to feature requests, with new requests implemented in several weeks at the longest. He laughs when he imagines trying to put in a quick turnaround request with the customer relationship management behemoth they were using before: “It would take three years!” Shelnuttt adds, “There were times when we’d jump on a call with PingPilot, and we’d have it the next day.”



Learn more about how PingPilot can help your company build more human connections.



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