Execs In The Know

BRAND SPOTLIGHT
UPWORK

Creating a Culture of Excellence & Remarkable Customer Experiences

Q: Tell us a bit about your background, how you came to be at Upwork, and a little bit about your current role.

My background is in the financial services industry and the tech sector, particularly online marketplaces. I also have passion for the transformative power of work to make people's lives better. At Upwork, I am the Senior Vice President of Operations, responsible for the Customer Experience, Global Payments & Disbursements, Trust & Safety, Talent Services, and Freelancer Success teams. Basically, I am responsible for ensuring clients and freelancers get to a great outcome: Clients get the work they want to get done and freelancers get paid for the work they do. Some of the most well-known brands have used Upwork for critical needs like mobile application and web development, marketing creative, content creation, and customer support. Clients anywhere in the world can pay for work and freelancers anywhere in the world can get paid for their work. The Upwork site is stocked with great work and great freelancers.

Q: How is Upwork changing the typical work environment and impacting both companies and freelancers alike?

The world is entering the 4th Industrial Revolution, driven by knowledge work and technology that allows us to no longer be tied to a specific location. By looking at overall demographics and attitudes towards work, it is clear brand winners will be those who view work (and talent) as no longer limited to physical boundaries like a building, city, state, or country. The most advanced brands know they are competing for the best talent and the best are not necessarily willing to sit in their building. Upwork delivers that remote talent to the client so they can do more and compete more effectively. For freelancers, the Upwork platform provides quality work opportunities with a payment protection program that allows freelancers to get paid for their work, no matter their location. Upwork allows many freelancers to have both a professional career and a great personal life not hindered by commutes or requiring them to leave the community they love.

Q: How would you describe Upwork's culture/values/overall mission? What value(s) do you find most important at Upwork? What about on a personal level – what values do you live by?

Upwork's mission is to create economic opportunity so people have better lives. Upwork's vision is to connect businesses with great talent to work without limits. Upwork's values put the community first: simply, if our customers don't succeed, we don't succeed. Every decision is looked at through this lens. One value is to build amazing teams: as a fast growing company, we know we need to be agile and create great teams to help get us where we need to go, even when we need to change directions. Another value is to have a bias towards action: I think this speaks for itself. We also want to inspire a boundless future of work. We are champions of the work model and our remote worker population is double the size of our office bound employee population. My personal value is to make a real difference in this world for the better in a scalable manner. At Upwork, I obsess about the customer and how we make them successful.

Q: Describe the average Upwork customer, the importance of exceeding customer expectations, and how service/experience plays into that.

Our clients run the spectrum from small one person companies to the Fortune 100. A typical hiring client is one who has many things to do, but has a limited

ELIZABETH TSE

SVP of Operations

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budget. Our platform is focused on knowledge work, with a significant amount of projects in web and mobile development, creative design, content creation, customer/admin support, and translation. We find the more advanced enterprise companies have already studied the key trends and are getting ready for the war for talent by ensuring they have a global flexible workforce.

It's also important to note that freelancers are equally important customers for Upwork. Without them, no work gets done. The freelancers are knowledge workers in the fields mentioned above. They are located in practically every country in the world. They are talented professionals who can win, manage, and deliver great work for the clients they find on Upwork.

Our commitment to great freelancers is to help get them as much work as they desire and help them get paid for their work. In a work marketplace, the single most important client experience is whether the work gets done as expected by the freelancer. When that doesn't happen, it is up to the service organization to see how we can make it right. We have a highly skilled mediation team responsible for bringing the two parties to acceptable outcomes for both. For the freelancers, the most important experiences are to get work, get treated fairly, and get paid in a timely manner. We have teams such as Freelancer Success that are committed to sharing best practices and success stories to help them grow their business. We have a dedicated Payments team focused on finding the best way for them to get paid. And we enforce policies to ensure clients treat their freelancers with respect.

Q: How should brands be leveraging customer data to enhance the customer experience?

How can you NOT leverage data to enhance the customer experience? From our perspective, there are two key programs for enhancing the customer experience: voice of the customer and effortless service. Voice of Customer takes key themes and pain points observed (via data and qualitative comments that have been run through sentiment analysis) to bring back to the Product Management and Engineering teams to enhance their product offering. We play a significant role in making our website more intuitive and easy to use for our customers to avoid the need for them to contact our customer support team. When our customers do need a helping hand, we use data to figure out how to make it as effortless as possible for them, which means helping them inside the product, even before they connect with us. We understand who they are and where they are on the site when they start typing for help. Using all the data we have, we surface the most relevant information to the

Driven by accelerating connectivity, new talent models, and cognitive tools, work is changing.

customer, even before they contact us. And when the information still doesn't cover their specific issue, we understand the channel of support that is most effective to solve their topic.

Q: Tell us about some of the innovation in your industry and what Upwork has done recently/has plans for to stay relevant to customers and above the competition?

We are innovating the industry of work everyday. We are disrupting contingent and traditional in-person work. Our whole existence and everything we do pushes the envelope further. Clients have the ability to post project work that can be fixed price or hourly, access an enormous global talent pool, including great companies, who they can invite or from whom they simply receive proposals. Our superior technology is able to surface the talent that best matches the clients' needs. Clients can then communicate with selected freelancers on the platform real time via our chat, video, and voice tools, create a contract to start work, be protected with our escrow tools and tracking software to ensure freelancers are delivering the work to them, and pay from anywhere in the world to freelancers located anywhere in the world.

Q: How do you anticipate AI impacting operations at Upwork and the overall customer experience?

As a work marketplace that matches millions of projects to millions of freelancers, success is determined by surfacing the best fitting freelancers to clients and the best fitting work to freelancers so they can create a match (i.e., agree to work together) instantly. In some ways it is a lot like dating apps. Equally great work and talent are available, but there needs to be the right chemistry. In the case of work, that chemistry is based upon job type, client preference, freelancer skills, etc. AI is critical in creating that match that leads to great work getting completed. Machine learning can determine what our customers find appealing and automatically

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adjusts the algorithm based upon the likelihood of success. The Customer Experience team uses AI to make the service experience as seamless and quick as possible for our customers. We use in-product help that allows customers to ask questions without clicking away. Understanding which page on the site they are, who they are and the question syntax, we serve up what we think are potential topics and questions. We have also been testing chatbots to create a more natural conversation tone versus the current search lexicon. Should customers need to go to our help pages, we use real time suggestions as they type in their query.

Q: What do you see as an emerging trend that you're either preparing for or know that you need to? This can be for the industry in general or specifically for Upwork.

For Upwork, it is all about the changing nature of work. Work is moving more towards knowledge-based work and technology allows companies access to the best talent in the world. We help companies who already understand the challenges they will face to get work done create a blended workforce. For those who don't understand the future of work, we try to help them understand the challenges and opportunities they face. Obviously, AI plays a huge role in the company already - both in our core product and in how we service our customers. We will continue to get better and better in our AI, creating better matches, predictions, products, and experiences.

Q: With over 90% of team members at Upwork located remotely, what are some of the ways you keep them engaged, motivated, and properly trained to deliver a consistent customer experience?

We have an extensive onboarding process for our customer experience team. This includes one week of self-study, one week of domain specific information such as tools, internal processes, and applications. The third week is Team Leader/Sr. Agent led training, where we do live case studies and ticket training with the agents. The next week is nesting within individual teams. This helps ensure that the team is empowered with the right knowledge to help our customers. We also have regular meetings with team members to provide coaching, guidance, and continuous learning. Communication is the key. It is important to have open and honest lines of communication with the team.

Payment protection program allows freelancers to get paid for their work, no matter their location.

Q: What is your top tip to create a successful customer experience?

Active listening. This is vital in creating a successful customer experience. Listening to the customer is not just waiting for them to contact support to understand their problem, but understanding the customer's journey and providing them with help to cross barriers they might face. It's important to put yourself in the customer's place. The customer must feel special and know that their interests are paramount.

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Thank you to Elizabeth and the entire Upwork team for taking part in this EITK Brand Spotlight. Stay tuned for more Spotlights coming your way!

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