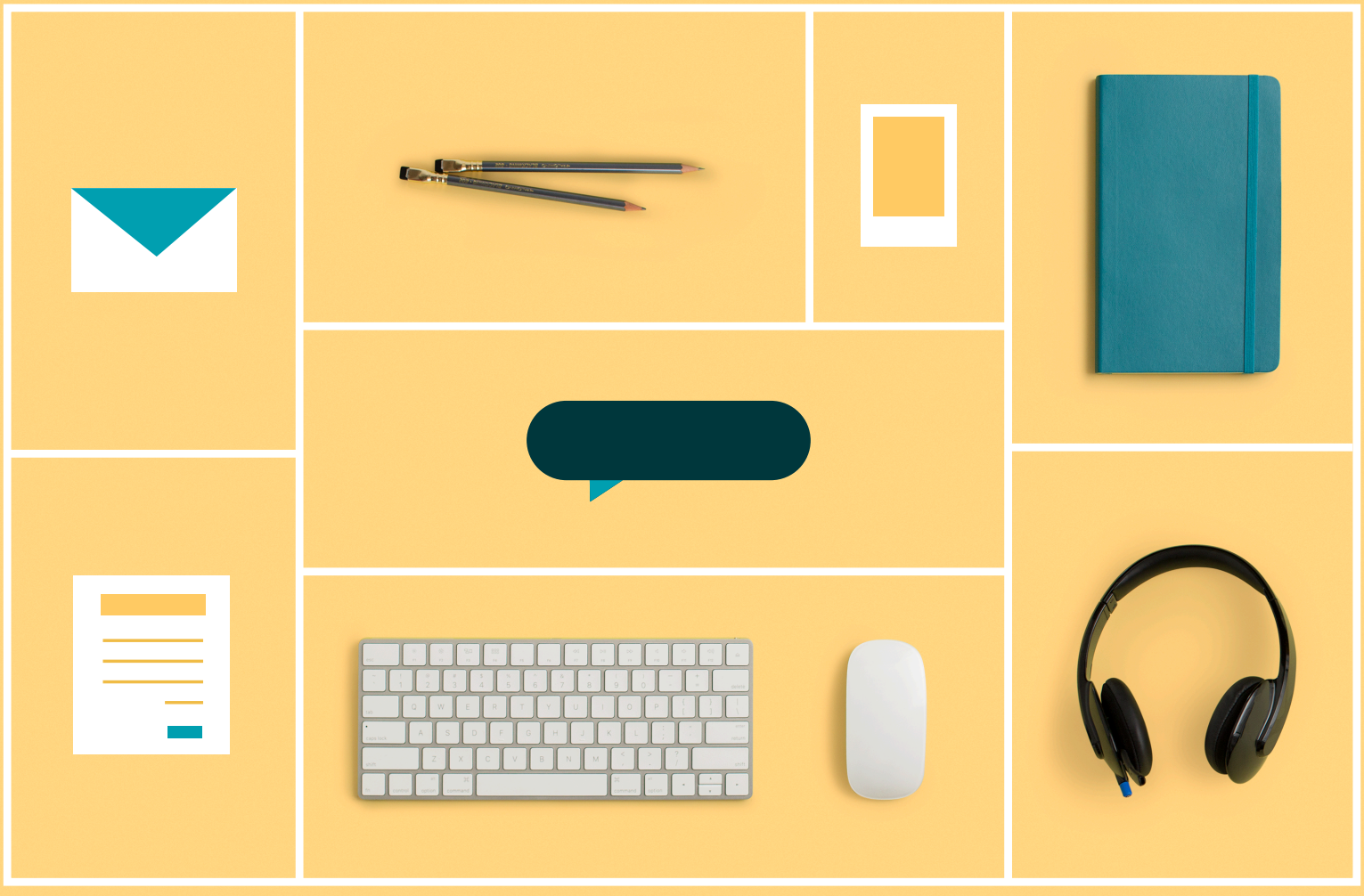
zendesk

Omnichannel support made easy with Zendesk



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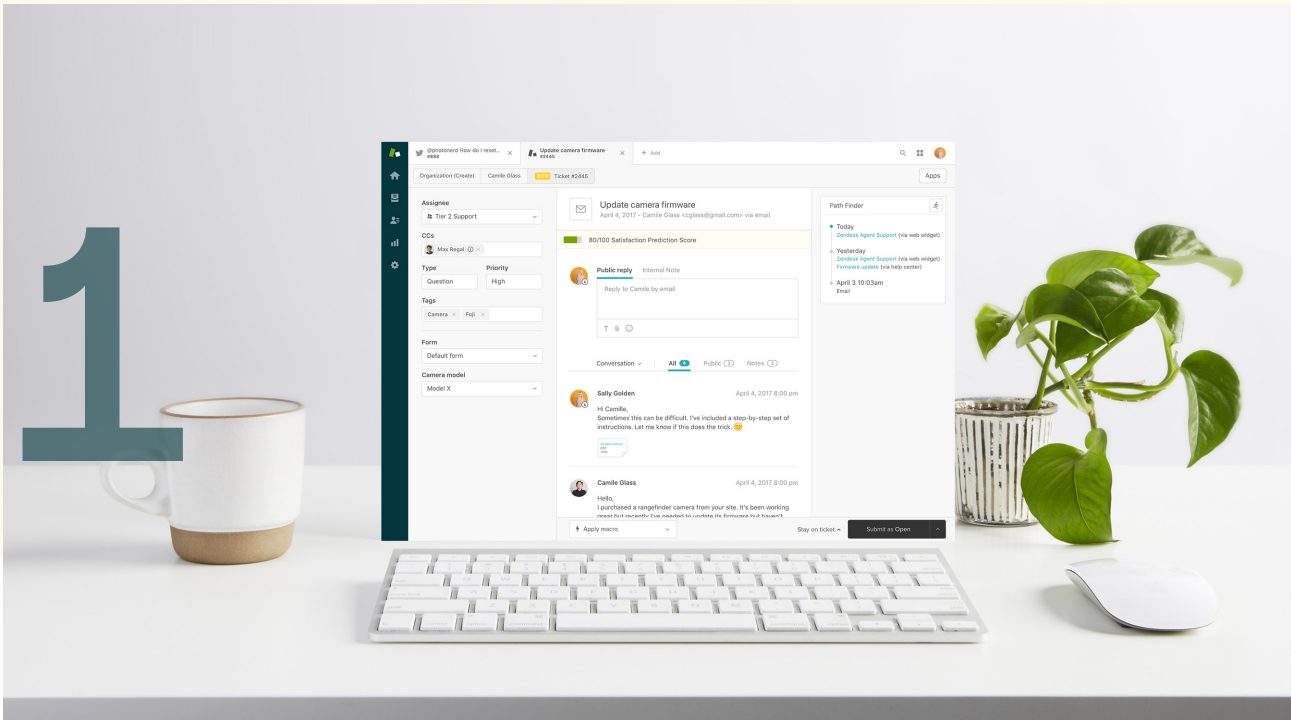
Introduction

01



For many businesses, it's tough to keep up with evolving expectations around where and how your customers can get help and how quickly you'll respond. Depending on the size of your support operations, it might seem safer and simpler to stick with a single communication channel and to focus on providing really great support.

That's all well and good, except in research conducted by Loudhouse, whose findings are published in the The Multi-Channel Customer Care Report, 57 percent of customers expect to have a choice of contact channels. We're not just talking about choosing between email and the phone, even as those channels remain the bread-and-butter of customer support. Sometimes, customers want to look up an answer for themselves. Other times, they might want to send a quick text or Facebook message. On top of this, Loudhouse reported that customers are less patient and expect more from their customer service experience than they did three years ago.

More channels doesn't mean more problems

At Zendesk, we know that providing great, consistent omnichannel support can be tough. But we also believe that providing support to your customers through a variety of channels doesn't have to be complicated or costly. Providing great support begins with the customer—and tailoring your offerings to meet their needs.

There are a few ways to go about this. Customers often use the contact channels that they prefer, or that are most familiar. Sometimes though, what we want or prefer isn't always what we need. Channel usage can have just as much to do with context and convenience as with preference.

With our phones in our purses and pockets, and the Internet on our phones, there's no bad time to ask a question. Based on the complexity of the question, how convenient it is to find help, and the context—who the customer is, what they're doing, and how urgently they need an answer—the right channel will often make itself apparent. That's why choosing the right channels to offer is as crucial as providing excellent support through those channels.

Use this guide to help determine which channels are best for your customers, and to learn more about what you can do with each channel as part of a Zendesk omnichannel solution.

Choose the right support channels for your customers

02

At Zendesk, our goal is to make it easy for businesses to offer service through any channel. We've also come up with some guiding principles to help keep your customers at the heart of the decision-making process; we call them the "the four C's".

The right answer will take into account each of the following: convenience, context, complexity, and cost.

Convenience

A great customer experience is one that's easy. Customers don't want to work too hard to contact you, nor should they. Convenience is all about the user experience—how easy is it for your customers to get help? Do customers have to look for a support link somewhere in your footer, or is it clearly available from the page they're browsing or within your app?

Depending on the nature of your business, some channels become obvious choices. If, for example, your business is based online, you'll want to offer some online support, like email or live chat. Taken a step further, ask yourself: Have you offered easy-to-find online support and a quick way to reach live help? The answer to this question might be the difference between whether you offer email and phone support, email and live chat, or perhaps even live chat and something else. We've all been victims of technology fails, so it's nice to include a channel that doesn't require a laptop or web browser, in the event of an urgent issue. It might even be as simple as letting customers text an urgent message—anything that connects with a human in real-time.

Context

Behind every customer and each interaction is a story. Customers make channel decisions based in part on their age and demographics, and in part by the type of issue they're experiencing. Email or self-service might be the way to go for a question that isn't time-sensitive, but needing to exchange a dress or suit in time for a wedding is a different matter, one which will almost certainly involve the telephone or live chat. Similarly, if you're a B2B tech company and you're handling technical issues or reports of bugs or system glitches, you'll want to be sure you can jump on known issues and take action. The best way to make an angry customer more upset is to make them wait for help.

Taking the time to consider the types of questions you see most often, as well as looking at the age and location of your customers, can be eye-opening. Industry best practices might tell you to offer a particular channel, but if, for example, you have a massive client base that prefers a mobile-first option, your support should be mobile-first, too.

Complexity

Issue complexity is another factor. Technical questions that require troubleshooting may be best served over a real-time channel like the phone or live chat, whereas questions about how to do something with your software might be better addressed through a self-service channel or by email, where users can follow step-by-step instructions at their own pace. The first step is to analyze the volume of your contacts and the types of issues you see most often. Consider whether there are ways—or better ways—to save time answering repetitive and low-touch questions, whether that's using pre-written email responses, setting up an IVR, a help center, or even an AI-powered bot.

Emotional complexity is another consideration. Issues that tend to provoke an emotional reaction from your customers might best be routed to live channels where an agent can more effectively manage that reaction. The same might be true for issues that require your agents to frequently return bad news. After all, you don't break up with someone over email.

Cost

Cost is the C that's reserved for your business. Though you're all about keeping the customer's best interests in mind, no one is working with an unlimited budget. It is possible that adding or turning on another support channel will increase costs, depending on the channel. At the same time, consider that costs incurred at the outset can be recouped and even decrease over time, if you take the long view. Assessing the full cost of offering a new channel also needs to account for the cost of not offering it, in terms of impact on customer loyalty and repeat purchases. A good omnichannel strategy is one that offers customers the channels that are right for them, thereby leading to higher customer satisfaction, faster resolution times, and better all-around customer experiences.

Solve for the best outcome

03

There's yet another way to think through channel selection: consider the business problems you're trying to solve for, and how replacing a channel or opening up a new channel might solve operational challenges.

For example, these indicators might signal that you don't have the right channels in place:

- **Low customer or agent satisfaction ratings**
- **Slow agent response times or large backlogs**
- **Too many drawn-out back-and-forth conversations**
- **Answering the same questions over and over**
- **Inability to prove that you aren't just a cost center and that your agents are contributing to customer conversions**

Increase customer satisfaction

Raising customer satisfaction has everything to do with convenience and providing effortless customer experiences, and some channels consistently lead to higher customer satisfaction ratings. According to The Zendesk Benchmark Report, live chat consistently earns the highest customer satisfaction ratings by channel, with an average of 92 percent.

Investing in self-service also goes a long way toward customer satisfaction. Forrester Research reported that the no. 1 trend for 2017 is to extend and enhance self-service over phone support. Forrester analyst Kate Leggett wrote, "Customers of all ages are moving away from using the phone to using self-service—web and mobile self-service, communities, virtual agents, automated chat dialogs, or chatbots—as a first point of contact with a company." A well-designed, well-maintained self-service option allows your customers to serve themselves in real time.

Context affects customer satisfaction, too. If your customers are heavy mobile users, or if you have an app, then help should be in the app, and you might consider adding SMS or messaging apps as a support channel.

Phone and email support aren't to be discounted here: voice support is an important escalation channel regardless of where a conversation starts, and remains the best way to handle urgent or sensitive conversations that require a live human conversation. Email remains the best channel for highly complex issues that require multi-step instructions or visuals, and can also yield high satisfaction ratings, particularly with tools like Zendesk's predictive analytics, which helps you to see which contacts are at risk for low satisfaction ratings so that you can take proactive and intentional steps to turn the customer experience around.

Channels that can raise customer satisfaction:

Chat
Self-service
SMS / Messaging apps
Voice
Embedded support

Bernie Gessner

Vice President of Global Customer Care & Retail Operations at Fossil

> We want to make as many channels available to our customers as possible. Zendesk gives us a system where the customer can engage with us in the way that they want to, and we then have the capability to serve them all the way through.

Raise revenue

Convincing the powers that be to invest in better customer service is hard when you're fighting the perception that customer support is "just a cost center." You know that your agents provide great customer experiences and influence future business, whether that's by winning a customer or keeping one from leaving, but it's tough to quantify.

The good news is that proactive support is one way to clearly prove that your team is moving the revenue needle. Data has shown that customers are three times more likely to make a purchase when you reach out proactively through live chat, and a 2017 report from Forrester found that chat increases conversions by 29 percent. By embedding chat on a checkout page, or even a 404 page, agents have the opportunity to engage the customer before they abandon their cart or leave your site. Wherever it is that your business loses customers is the perfect location to put a live chat widget.

Any channel that promotes real-time person-to-person engagement, using tools that can track interaction outcomes, is where you can best leverage opportunities to influence buying decisions. SMS text messaging can be another convenient way to prompt customers, and of course, voice is always a persuasive channel (e.g., "Need help completing your purchase? Give us a call!").

Channels that can impact revenue:

Chat
SMS
Voice

Dylan Henry

Director of Customer Experience at Handy

> We want to be anywhere and everywhere the customer is able to contact us and build a reputation for providing an immediate response, no matter the date or time. Zendesk allows us to do that.

Boost efficiency

Often, increasing efficiency while reducing operational costs is best accomplished through channels that allow customers to self-serve or that allow agents to help more than one customer at a time. This is why live chat, messaging apps, and social media are all great options for providing quick responses.

With the right tools, there are also ways to make email support efficient. Macros, or pre-written answers, help save time. Sorting tickets into views can help move agents through the queue in a focused way, or you can set up business rules to automatically route tickets where they need to go and to ensure you meet your service level agreements. Zendesk's email, voice, chat, and self-service products all offer features that help provide more context, so that agents can see where a customer has already looked for help and not start every conversation from square one.

Channels to help boost efficiency:

Chat
Self-service
Email
Messaging apps
SMS
Social media

Mike Robichaud

Manager of Support Products at Coursera

"Everything from Zendesk Chat to Guide to the core Support ticketing APIs has been tremendous for us.

Improve agent satisfaction

Bots are great for handling busy work—the kind of things that become rote and boring and repetitive for agents. Customer service can be a tough job, and so agents appreciate it when you can automate things that take time and energy away from more challenging tasks. When you spend time on your knowledge base and invest in self-service, you can deflect a lot of ticket volume and give agents more time to solve more engaging issues.

Something to consider is that email can be more work for agents when the contact doesn't come in through a ticket form. Ticket forms help collect the right information for customers and allow you to create triggers to automatically route tickets to the right place. When it comes to agent satisfaction, chat is efficient and yields great customer satisfaction but, like phone support, can take an emotional toll on agents. They have to be "on," actively dealing with sometimes angry or rude customers. For this reason, part of your channel decisions should include how you'll schedule your team to cover them.

Channels to improve agent satisfaction:

Email
Self-service
Chat
Voice

Dan Ross

Support Operations Manager at Lightspeed

> Zendesk products have allowed us to deliver better support to deliver better support to all our clients. The agility with which we can implement new features and workflows is a key element to our success.

The Zendesk omnichannel solution

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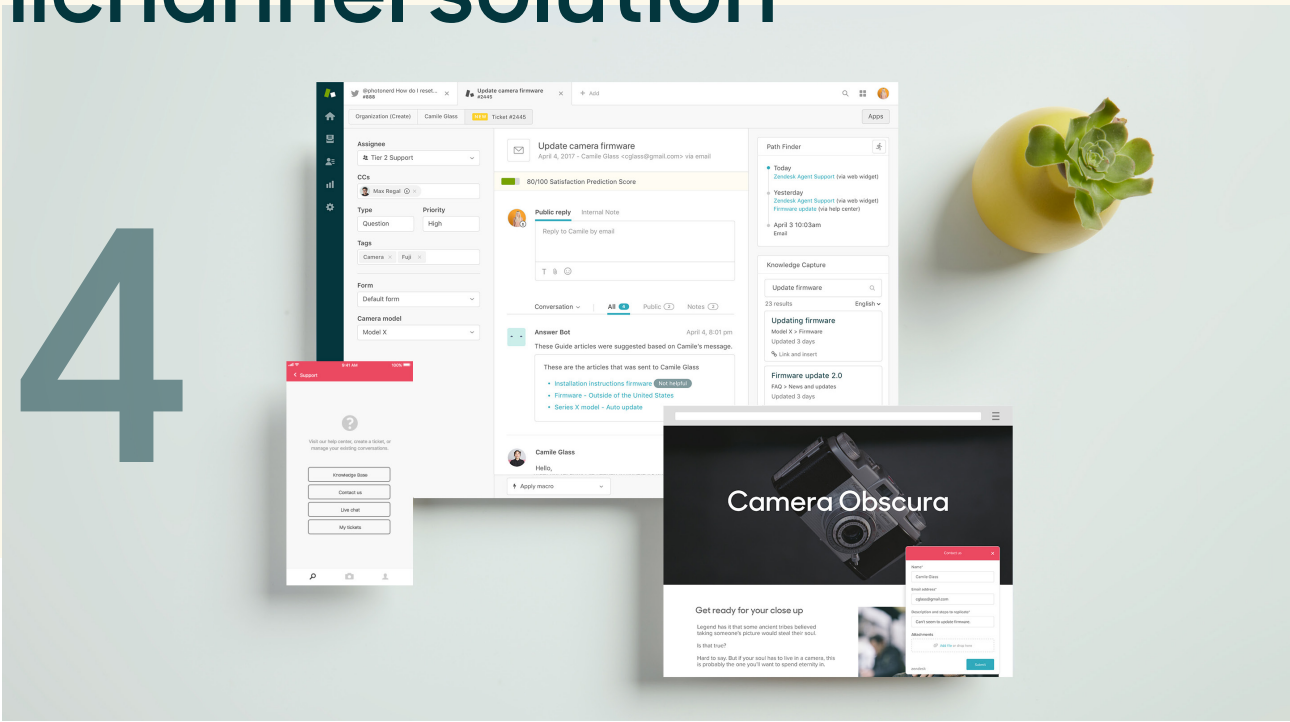

Helping you to provide easy, cost-effective omnichannel support is something Zendesk can help with. The Zendesk family of products are simple to set up and manage, and are designed to work seamlessly together.

Since each key channel—whatever those are for your customers—are connected, everyone gains visibility into the customer behind the ticket and can see their full support history. Customers don't have to repeat themselves each time they contact you or move between channels. What's more, it's easy to turn channels on and off in just a few clicks, allowing you the agility to adjust and grow alongside your customer base.

Email

Email support runs through Zendesk Support, your central ticketing hub. As customers contact you through the channel of their choice, agents work from a single interface so that they can focus on delivering fast, personal, and *consistent* customer service.

Zendesk Support is a simple-to-use product that was built to allow you to customize your support offerings in any way, shape, or form.

With Zendesk Support you can:

- **Give agents more context** by tailoring the information you collect from customers using dynamic request forms
- **Meet your service-level goals** by setting service level agreements (SLAs) to ensure you respond within an expected timeframe for each channel
- **Customize your workflow** using business rules and automations to ensure that no ticket ever gets left behind
- **Save time** responding to frequently asked questions by creating macros (pre-written responses) that every agent can use
- **Predict the future** by turning on our predictive analytics feature. And by predict the future, we mean, raise customer satisfaction levels to new heights and turn potentially negative customer experiences around.

Chris Wilson

Director of Technical Support at Shopify

"Zendesk is the hub, the central tool we connect everything to.

Phone

The human voice is a powerful tool for resolving issues, as well as a channel that fosters connection with your customers. Zendesk Talk is call center software built right into Zendesk Support, allowing customer service teams to provide phone support from the same place they manage all other channels.

Zendesk Talk lets your team:

- **Focus on conversations, not workflows** with automatic ticket creation, access to the full customer history, and call recording for accuracy and coaching afterward
- **Streamline queues** with flexible IVRs and group routing and allow customers to request a callback or text message instead of waiting on hold
- **Track and improve** the efficiency of your phone support with powerful out-of-the-box cross-channel reporting and analytics and agent monitoring tools
- **Improve customer experiences** by delivering seamless, personal support across channels—escalating from a chat or an email to a phone call as required
- **Quickly scale up and down** as needed. Since Talk is a VoIP system, natively-embedded into Zendesk Support, setup only takes a few minutes, and all an agent needs to get started is a computer, an Internet connection, and a headset.

Mina Aiken

Head of Customer Experience, Taylor Stitch

"Zendesk Talk allows our team to deliver excellent customer experiences as our business continues to grow. Our agents have everything they need—customer history, order details, and previous tickets—all in one place, for fast, personal support.

Live chat

Live chat is a fast and effective way to offer help and create personal connections with customers. To help with that, Zendesk Chat is our integrated chat product that allows you to respond to customers or reach out proactively, and to embed chat anywhere on your website and natively within your app.

With Zendesk Chat you can:

- **Reach out in real time** and welcome customers before they ask for help. Proactive engagement using automated triggers encourages conversions and, for retailers, helps reduce cart abandonment
- **Dig deep into the metrics** through Chat's real-time analytics, which dive into customer satisfaction and agent performance
- **Manage all conversations from a single dashboard** whether customers are chatting with you from their laptop, mobile phone, or through your app
- **Help multiple customers at once** and keep an eye on the queue with real-time queue monitoring
- **Create seamless experiences** by embedding chat on any page, or within your app, using the Zendesk Web Widget
- **Surface content from your knowledge base** before sending a chat through to an agent

Jorge Vernetta

Global Operations Manager at foodpanda

"Live chat lets agents handle multiple chats at once, so the wait time is reduced and customers have a better experience.

Self-service

Great self-service begins with a well-maintained knowledge base, one that allows customers to easily find content from the context of where they are, whether that's browsing your site or using your mobile app. Exceptional self-service is the result of a knowledge base that gets smarter over time. Zendesk Guide is our solution for self-service support, allowing your team to create and refine a knowledge base that keeps learning. What's more, Answer Bot can take the first pass at offering answers to low-effort, high-frequency questions.

Use Zendesk Guide to:

- **Create a central repository** of agent knowledge that new and seasoned agents can access and use directly from their agent interface. Once that's done, you can manage and distribute that knowledge from a single, easy-to-maintain location.
- **Continuously improve your knowledge base** using the Knowledge Capture app, which allows agents to search for, create, and flag content for improvement
- **Solve tickets faster** in Zendesk Support using the contextual insights from Guide, which help to ensure that agents don't send articles that the customer has already read
- **Measure the effectiveness of your content** to see what's working, what needs work, and to uncover what you need to write next
- **Automatically suggest relevant articles** to customers while they wait for an agent. Answer Bot, powered by Zendesk artificial intelligence, is at your service to handle those often-asked, easy questions, freeing up agent time to focus on problems that require a human touch.

Mike Cartwright

Chief of Partner Solutions at Expedia® Affiliate Network

> Investing in our knowledge base meant we saw a massive decline in the number of support requests coming in. Partners were getting what I consider to be the very best service—which is that they never had to log a ticket in the first place.

Social media

Consumers spend a lot of time in social media and messaging apps like Facebook, Twitter, WeChat, and more. When you can communicate with your customers where they socialize, it becomes a personal and intuitive way to interact within the context and convenience of their lives.

You can enable the native Facebook and Twitter integrations in Zendesk Support to turn social media messages or posts into tickets, or use the Message feature of Zendesk Chat to manage multiple messaging profiles in one dashboard and jump between different points in a customer's conversation history.

You can also use the Message feature of Zendesk Chat to:

- **Extend your reach** by bringing customer support to Facebook and Twitter and meeting customers in the social sites where they most often engage
- **Be more available** by allowing customers to reach you, even outside your posted support hours
- **Allow agents to own conversations** for better workflows and to create more personal relationships—when you link multiple profiles, you can funnel all customer conversations into a central location for agents to manage
- **Help a bot out** by bringing questions from your chatbot to Message when customers ask to speak to an agent

Alan Tisch

CEO, Spring Inc.

"Bots on Messenger is a prime example of how conversational commerce is developing, and Spring is thrilled to work with Zendesk to deliver users a shopping experience that seamlessly integrates an automated personal shopping assistant with best-in-class concierge customer service.

Support that sticks with the customer

The best thing about providing easy omnichannel support is that you can provide it everywhere, on every device, everywhere the customer goes. With Zendesk Embeddables, you can embed Zendesk functionality natively into any app, website, or device through our API, Web Widget, or Mobile SDKs. This keeps the experience consistent for customers, and your workload efficient.

- **Reduce friction for customers** by keeping them where they are, in-app, on any website, or device
- **Present information in the right language** based on the customer's browser settings
- **Maintain brand consistency** by enabling seamless customer support across devices and operating systems
- **Be more efficient and deflect tickets** by embedding your knowledge base into your app or web widget

Will O'Keeffe

VP of Customer Success at Acquia

"Zendesk's robust API has enabled us to customize our customers' and teams' experiences. It easily integrated with the powerful systems we already had in place.

More channels, more solutions: A checklist for success

05

Of course, there's no magic formula for omnichannel support success. Your success depends on creating an omnichannel strategy that solves for your customers' needs.

Use this checklist to ask questions that keep your customer at the center of your decision-making process.

Convenience:

- ☐ Where on your site can customers access support today?
- ☐ Where would you like them to be able to access support in the future?
- ☐ Do customers have an option to self-serve?
- ☐ Is there a way to reach a human for live, fast help?
- ☐ With your current solution, are you able to recognize a customer and their support history if they contact you using two different channels?

Context:

- ☐ Who are your primary customers—how old are they, and where do they live? How does this affect your channel offerings?
- ☐ What types of issues or questions do customers most frequently have?
- ☐ Are there questions that could be automated or handled by self-service?
- ☐ Is there a way to receive immediate, real-time help from a person?
- ☐ Can customers access support channels from your mobile site or app?

Complexity:

- ☐ How much of your volume requires troubleshooting and back-and-forth interaction with agents?
- ☐ How much of this volume is time-sensitive?
- ☐ Are there questions that could be automated or handled by self-service?

Cost:

- ☐ Are you offering the easiest and most efficient channels for customers?
- ☐ Would opening a more costly channel potentially reduce volume in other channels?
- ☐ Would a more costly channel lead to higher customer satisfaction?
- ☐ Could you offset the cost of a new channel by embedding or increasing self-service options, or automating the answers to easy questions?

The right channel mix for your customers and business is one that will help optimize your operations, not weigh them down. You'll be able to deliver better, faster, and more personal service by guiding customers to the right channel for their issue.

Zendesk's omnichannel solutions enable you to meet you customers wherever they are and to provide a consistent customer experience. Channels are connected so that conversations are seamless, agents are more productive, and you can collect valuable customer information to share across your company.

When you start with an omnichannel approach, customers can solve their issues with the least amount of effort, and you can quickly get up and running on the channels you need now, and be ready to provide support on new channels as you grow and scale.

For more information about omnichannel support, schedule a demo at http://www.zendesk.com/demo

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