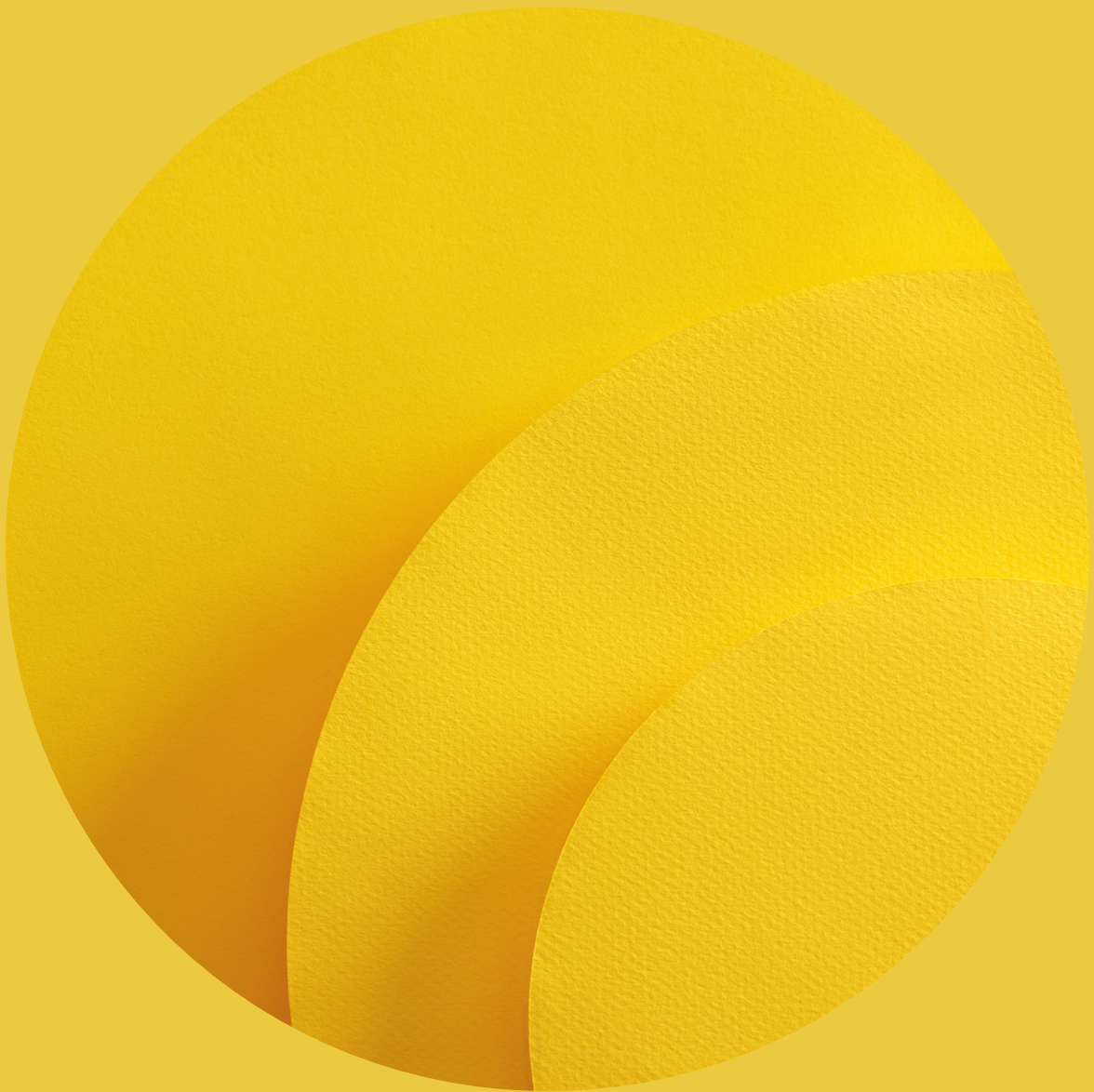


# Getting started with Sunshine

How to take control of your CX pain points



# Introduction

We're collecting more data now than ever before. Whether it's customer data like loyalty status or business data like product inventory, each piece of information is crucial to manage. Even though we have all of this data, most companies don't store it in one system—so it gets siloed. And when your data is siloed, it's virtually impossible to activate it. And that can lead to bad customer experiences. That's why we created Sunshine.

Sunshine is an open and flexible CRM platform native to AWS that lets you seamlessly connect and understand all your customer data, wherever it lives. By integrating information under a single pane of glass, agents can see who your customers are and how they've interacting with your brand. And, it empowers your agents to act on these insights and solve problems more efficiently.



# What makes up Sunshine?

There are four key components of Sunshine. Here's what they do and why:



## Unified profiles

let you connect customer profile attributes so you can see information like loyalty membership status or recent spend in one place.



## Custom objects

allow you to store and see whatever data you want about the customer. This could be their order history, their household members, or their licenses.



## Custom events

allow you to connect customer interactions in real time from any system and surface that information for your agents. This can be any action that's important for you to track, like shopping cart activity or a return being initiated.



## Sunshine Conversations

lets you unify messages from every channel into a single conversation, and build interactive messaging experiences anywhere. Go beyond support with AI, bots, and integrated apps for conversational business at scale.



# 3 common CX pain points Sunshine can help you solve

Take a look at how you could put Sunshine's features into practice in the real world.



## 01 A fractured view of your customer means they don't get the support they need.

We know the realities of modern support. Agents have to toggle back and forth between applications and spreadsheets, and it's stressful, repetitive, and time consuming. They're missing key business insights that are crucial to solving your customer's issue. It's an expensive problem too, not only because agents take longer per ticket, but they are often on multiple systems with expensive per-seat licensing.

### How Sunshine helps:

Sunshine brings together your customer data so your agents can turn insights into action without ever leaving the customer conversation. And because Sunshine is open and developer friendly, you can build or install apps to make repetitive processes a one-click experience that flows naturally into how your agents already work.

By bringing together customer data and delivering it in the agent workspace, we're making it easier for your agents to focus on the customer experience. Take, for example, one

of our customers, a well-known watch retailer with three global brands that have a strong in-store and e-commerce presence. With the brands scattered across different ERP systems, agents struggled to retrieve customer warranty information and purchase data. They had to toggle between multiple systems and cross-reference data, which slowed down their ticket resolution. The company created a sidebar app using Sunshine Custom Objects, instantly providing all product and warranty information whenever an agent accesses a ticket.

# 1 in 5

businesses have  
lost a customer due  
to incomplete or  
inaccurate data

[Source](#)



## 02 Your customer experience is one size fits all, but your customers aren't.

There have never been more ways for customers to interact with your brand, and every interaction is a new opportunity to provide a tailored experience. But too often the customer experience is complex, which makes them do the work to interact with you. Customers shouldn't need to provide model numbers, loyalty numbers, order numbers, serial numbers, or warranty information just to get help. With multiple channels to manage and mountains of data to organize, it can be hard to know where to start.

### How Sunshine helps:

Sunshine doesn't just store the data for viewing inside a CRM. It's a platform that can power other applications. Integrating the same complete customer view into websites, ecommerce sites, marketing touches, and mobile apps, Sunshine can help your agents provide the 1:1 service your customers demand. Take for example, our Fortune 500 customer in the technology retail industry. While managing more than 780 SKUs, they struggled with huge data storage fees with a fragmented customer experience across their

brands. Using Sunshine Custom Objects, the company integrated product and customer data from various systems and created thousands of relationships to better understand each and every customer worldwide. Now, when one of their customers logs in to the help center, they don't need to find the model number of their keyboard or mouse, because they automatically see the right content for their registered products (such as support documents, warranties, and shipping status) without having to lift a finger.

# 80%

of customers  
are more likely  
to purchase a  
product from a  
brand who provides  
personalized  
experiences

[Source](#)



## 03 Customer experiences are reactive instead of proactive

When things don't go as planned, your customers may let you hear about it. One issue has become two: fixing the problem and trying to turn an unhappy customer into a happy one.

Meanwhile, your customers are creating and sharing more data with you than ever before. [2.5 quintillion bytes of data are created every day](#). To put that number in perspective, it would take about 210,000 years for a quintillion gallons of water to go over Niagara Falls. So, it's a lot of data. We should be using it to act on issues before the customer even realizes they exist. But most businesses cannot act on all of their customer information.

### How Sunshine helps:

Sunshine helps get those insights into the hands of your agents or automated systems so they can deliver proactive support. With real-time customer data, agents can anticipate needs, resolve issues faster, and defer to a lower cost of service channel. Waiting for a call to come in from an angry customer is expensive, but sending a proactive email with the steps to resolution is not.

For one of our customers, a car sharing service with over 700,000 members operating in the United

States and Europe, using data to head off problems meant happier and safer customers. They needed to proactively monitor vehicle vitals and address mechanical issues before their customers got in their car. Using Sunshine, they were able to monitor and take action on their fleet of over 10,000 vehicles. Now if an issue pops up, support tickets are automatically created to alert fleet coordinators for maintenance or repairs. Their customers never rent a car that needs an oil change or has a dead battery because the company knows about it before they do.

# 97%

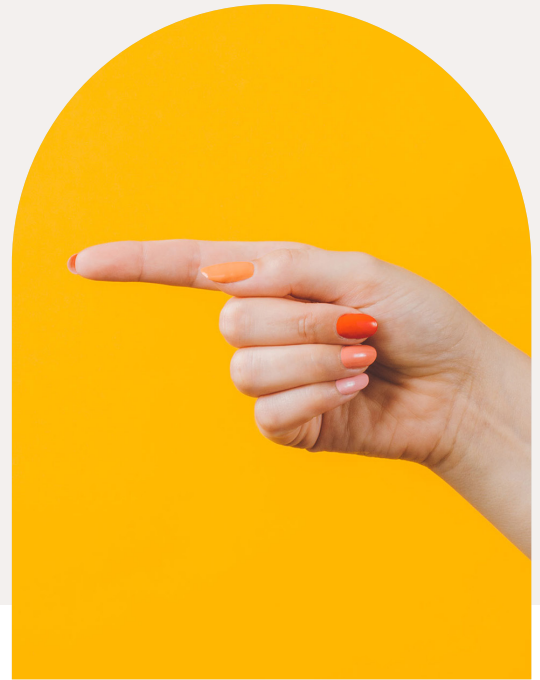
of businesses  
cannot act on all  
of their customer  
information.

[Source](#)



# How to get started

Sunshine was designed to be open and custom to your business, meaning you could do almost anything with it. But knowing what problems you want to solve will help you narrow down on a solution. Start by asking the following questions to determine which features are essential to your team's success.



## 01 Define your challenges

### What are areas for improvement?

We know CX teams are being asked to do more with less, and part of that is empowering agents to be more productive. Talk to your agents and see where they're getting stalled or feeling frustrated. Here are some questions to ask to get at the pain points:

- Is there data your agents can't readily access that could improve your customer experience?
- Are your agents hopping between different applications, like your CRM or order-management-system, to retrieve customer data?
- Are there repetitive tasks that take a lot of time for your agents? Could they be automated?
- Pay attention to what ticket types take longer to solve than others. What data could you integrate to shorten solution time?
- Is CSAT dipping? If so, why do your agents think it's happening?
- How is your agent morale and job satisfaction?
- Do you have to make a case for software licenses every year so your agents can do their job?

### What's the experience like as a customer?

Test out the customer experience by actually being a customer and ask a friend to do the same. Order a product online, or try to book a service. Be honest. Where along the way might customers be getting frustrated? Here are some things to consider:

- When you want to resolve an issue on your own, is it easy to find the information you need in a resource library or search tool?
- When you engage with a chatbot, what kind of information does it have? Does it feel like a personalized experience?
- When you call customer service, does the agent know who you are when they answer the call? If you get transferred, do you have to repeat your story to the next agent?
- When reviewing your order, do you have to keep typing in your order number or other details?
- Is all your information in one place, or do you have to go back through emails for order history and warranties?

## Reimagining the role of CX

Your agents are on the front line of communication with your customers. Nobody talks to them more on a day-to-day basis, and each interaction is an opportunity to do more than just solve problems. Take a deeper look to see if your CX could become a chance to bring in revenue:

- Do your agents have the opportunity to go above and beyond to provide white glove service with their current set up?
- Can your agents check product inventory for other stores in the surrounding area?
- Do your agents have the ability to order products, or provide exchange recommendations without leaving Support?
- Can agents provide one-click upsell opportunities for the customer?
- Are there opportunities for agents to turn a service experience into a sales experience?

## What's the experience like for an agent dealing with an upset customer?

Look at your agents' current workflow to find spots where data could help them be proactive:

- Are you able to access real-time data on your customers devices?
- Can you identify issues with an order or service before your customer does?
- How much efficiency does your agent lose by spending time on an hour-long phone call?
- What's more cost-effective for your company: agents taking phone calls or sending proactive emails, text messages, and other low-cost touchpoints?

## What this looks like

One of our customers is a premium men's apparel brand that promises "the perfect fit for everybody." They started out as an e-commerce only company and have since expanded to 715 retail locations across the United States and Canada. Taking a service-led approach, the company wanted to help their agents personalize product suggestions and ultimately boost sales. By integrating marketing CRM data into Sunshine through Custom Events and Unified Profiles, their agents gained a full view of their customers. The company also built a custom app that allowed agents to make product recommendations. Now when a customer has a question, agents make personalized product recommendations with one click, transforming service into a satisfaction-boosting profit center.



## 02 Define your goals

Now that you've identified your challenge areas, define the goals for using Sunshine.

### Are you looking to:

- Improve your agent experience by giving them data they need at the right time?
- Know about product problems so you can solve them proactively?
- Have data readily available to your agents for quicker ticket turnaround?
- Enable agents to make product recommendations and make sales?

Once you've identified goals, figure out what your primary goal is – are you taking on a big project, or do you want to move fast and produce a Minimal Viable Product (MVP) and see how it progresses from there? Are you trying to solve a big systemic problem that could have significant impact, but would take longer to implement? Or, do you want to achieve small wins more quickly to build confidence? Whatever you decide, taking time to make sure your goal is specific and measurable will save you time in the long run.



## 03 Identify the root causes

At this point, you know what you want to achieve to improve your customer or agent experience. Before you jump in, figure out what's at the heart of the issue that's holding you back. Often, bad customer experiences are a result of complicated factors that people believe are out of their control, but the root causes could be simpler.

**Here are some ideas to get you thinking:**

- What kind of information are your agents toggling between platforms to find?
- Do you have various systems storing data about the same customer? Does this ever cause issues?
- Are your processes built around your customer, or around your systems mandatory fields and rules?
- Are your sales, service, and marketing teams able to collaborate and share knowledge?
- Are there reports you can't run but would like to?



# 04 Find your Sunshine resources

You know what your team is struggling with, you know why they're struggling, and you know what your goals are. Now it's time to find a developer who can help you make it happen.

**Here are three ways to get started:**



## Internal developer resource

You might be lucky enough to have a dedicated developer who is able to help. If so, give your developer a high five, they're about to make you a rockstar! We've put together a list of helpful resources for them:

- [Zendesk for developers](#)
- [Getting started with Sunshine for developers](#)
- [Sunshine Conversations developer guide](#)
- [Sign up for a Zendesk developer account](#)



## Zendesk Professional Services

If you don't have a developer on staff, our Professional Services team would love to help you build this project. We have custom packages you can purchase based upon your specific needs. Reach out to your account rep to get started.



## External Developer Partner

We also have a lot of partners who can bring value with their vertical expertise, unique solutions, and strong partnership. Check out the [Zendesk Partner directory](#) to find community-reviewed partners you can work with.



# 05 Scope the project with your Sunshine resource

Whether you'll be handling this project internally, with Zendesk, or with an outside partner, it's important to properly scope the project to make sure everyone is on the same page. This part can get a bit technical, so you might discuss these steps directly with your technical resource:



## Briefing

Start by briefing them on exactly what you're hoping to solve—it's more important that they understand your challenges and goals than it is to talk about the technology at this point.



## Identify data sources

Next, identify the various data sources (on-premises data stores like Oracle DB, MySQL, cloud datastores like Snowflake or Redshift, or other customer engagement applications like Salesforce or Shopify) you want to integrate with Sunshine



## Work with your developer and IT

Work with your developer and centralized IT to understand how to access APIs for those data sources. That could include generating an API token or provisioning a database user to query the source system.



## Create a project plan

Finally, create a project plan for integration for the following steps:

- Generate connections between source databases and the target Sunshine APIs
- Extract (and optionally filter or transform) data from the source system to normalize into your Sunshine schema
- Create a script or job to programmatically sync data between your source system and Sunshine
- Work with your developer and agents to iterate on a design for a custom Zendesk Support application that will optimize support workflows.
- Build and test the application using the Zendesk Apps Framework & Zendesk Apps Tools.
- Deploy your application to your Zendesk Support workspace and install within Admin settings.





# 06 Get building

Here's what your developer needs to know to get started with Sunshine:

**Like the rest of Zendesk's products, Sunshine is native to AWS.**

- Sunshine has a set of [REST APIs](#) that you can use to push and pull data from Sunshine.

**Sunshine is based on open-standards and supports the use of tooling and programming languages of your choice.**

- Experience working with REST APIs is helpful, as is experience working with event-based architectures.
- Experience building and deploying server-side web applications may be helpful as well, depending on your particular use case.

**Many Sunshine applications leverage:**

- An integration platform (iPaaS), like Workato or Tray.io.
- [Zendesk Application Framework \(ZAF\)](#): ZAF lets you extend Zendesk beyond its “out of the box” functionality. Experience developing with standard client-side web technologies (HTML/CSS/JavaScript) provides a good starting point for working with ZAF.
- Applications that leverage client-side technologies only can be hosted by Zendesk. ZAF also supports server-side applications built using technologies of your choice.

The amount of developer resources required will largely depend on the specifics of your project. Many Sunshine customers have gone live leveraging only a single developer resource.



# Ready to give Sunshine a try?

We hope you've found this useful, and are inspired to tackle even your hairiest CX challenges. But you're not in this alone. We've got more resources—from a customer webinar to idea guides and architecture guides—all on [zendesk.com/platform](https://zendesk.com/platform). You can also reach out to your account team and the Zendesk community for help.

**Get a free trial of Sunshine Lite and [learn more about Sunshine](#)**