Insights to Explore

zendesk

Introduction

Congratulations on taking the first step towards migrating to Zendesk Explore, an analytics product that helps businesses measure and improve the entire customer experience. Explore ties together data from every Zendesk channel to give support leaders a complete view of how customers interact with their business.

By migrating to Explore, you'll get significant improvements over Insights. Right away you'll notice improvements like:

- Better pre-built reporting and easier ways to build charts & dashboards
- Richer calculation and customization options
- New compliance standards (Data Locality, HIPAA, SOC2) and roles & permissions
- Faster data refresh (especially for Support Professional customers)

If that all sounds great, you're likely already thinking about how to roll Explore out to your team. An essential part of planning a successful rollout includes change management. We also know that managing change is complicated. This guide will cover all your bases — from defining your vision to getting the right stakeholders involved early. We'll go over each step with tips and tricks to help you through the migration process so that you can harness the power of customer analytics in Explore.

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STEP 1

Establish vision and gain buy-in

Before you start building in Explore, use this as a good opportunity to define the vision and role service data should play in your department. Now is a great time to take stock of your organizational goals and single out the metrics you track to measure the success of the business. The role your service data plays has probably evolved since your business has grown.

We've put together a sample checklist of topics to brainstorm to get started

- ☐ Plan and understand the operational goals for your department
- ☐ Define what success means and which metrics you should be tracking to measure this. i.e. How do you define the ROI of your team?
- ☐ Understand which data points are being captured in the customer journey today that can contribute to a more data-driven decision making process
- ☐ Identify your key stakeholders – who will need access to the data and how frequently?

Once you've defined what you want out of your reporting, communicate this with the stakeholders most likely to be impacted by the migration to Explore. When you involve your teammates early, they can act as advocates of change, bringing important feedback perspectives to the table and ultimately sharing your vision with the rest of the organization.

STEP 2

Plan resources accordingly

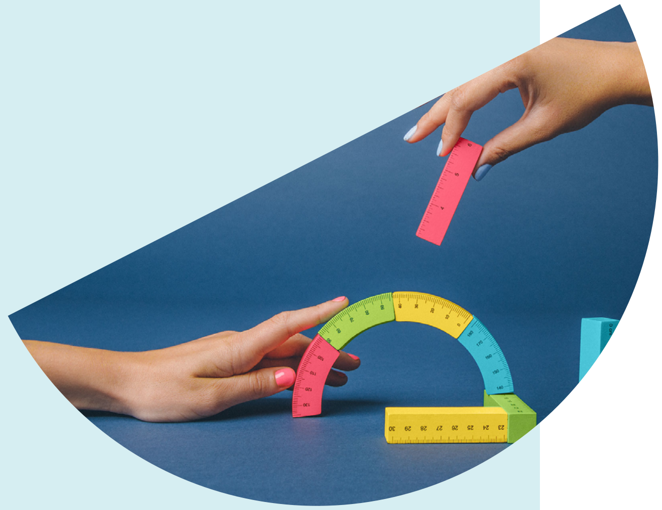
Once you've determined the key metrics you'll be tracking, the next step is to identify resources to help implement the plan. Outline a project plan and establish clear milestones while ensuring you have ample time to build, train, and enable your team.

We suggest forming an internal task force. At this point, the stakeholders you involved early on can serve as excellent subject-matter experts to help with the implementation of Explore. Set recurring meetings, identifying actionable next steps for each sync as you progress with the design and review of your new Explore reports. Taking these steps early will help drive the success and adoption of customer analytics down the line.

If you need help with planning, a Zendesk account representative can assist with any questions. For more support, our Zendesk professional services team is ready to assist your team and give you the help you need to make the most of your migration. You can learn more about them **here.**

STEP 3

Build, build, build



As you start building your new reports, leverage our many **online resources** to familiarize yourself with Explore. From guides to online or in-person training, evaluate what would work best for you and your teammates. Remember that you don't need to start from scratch. We've incorporated research and best practices to develop pre-built dashboards so you can start using Explore immediately. With a no-code environment, it's quick and easy to customize the pre-built dashboards to cater to the unique needs of your business.

brandmuscle

Brandmuscle, a global marketing and compliance platform, is using Explore to benchmark team performance and gain visibility into support volumes. As a customer who recently made the move to Explore, Brandmuscle recommends that others going through a similar migration should take advantage of the available self-service tools, webinars, and video training — and to not be afraid to get messy by starting small and iterating along the way.

Still unsure how to get started? We've broken down this process step-by-step:

1 Audit your Insights reports

Work with your team to determine which Insights reports are most actively used and those that make sense to bring to Explore.

2 Prioritize your build

After deciding which reports your team intends to move to Explore, prioritize which you'll build first. We suggest that you start with key reports, such as those that help your organization understand team performance, the health of your support operations, and your customers needs.

3 Dig in with Explore

Get your hands dirty and don't worry about breaking anything. Navigate around the product and get a sense of these cool features:

- **New pre-built dashboards:** Take a look at the dashboards that come out of the box. These dashboards are built with best practices in mind so you can start getting value out of your data right away.
- **Chart builder:** Build your first chart in seconds using just a few clicks. There are many visualization and customization options to choose from to make the charts your own.
- **Dashboard builder:** Add and arrange your queries onto a dashboard. There are a variety of options to add tabs and additional images or notes to supplement your new insights.
- **Admin options:** Manage data access and customize what your teammates can see and do in Explore.

4 Start by building your queries

To create a query, pick the data source containing the information you want to report on. Then add metrics and attributes to slice your data in different ways before choosing how to display your data with the different available visualization options. You can create all your queries at once prior to arranging them on a dashboard later. For more information on building queries, visit our help center **here.**

5 Create calculations as needed

For more advanced analysis and to cater reports to the complexities of your business, you can create custom metrics and attributes using the Calculations menu. Learn more about writing custom formulas **here.**

6 Add queries to your dashboards

Once you have queries built, you can add and arrange them onto a dashboard. You can also supplement your dashboards with images, text, shapes, and additional tabs.

7 Set up scheduled deliveries

Next, you can automate the sharing of new reports by setting up scheduled deliveries to groups or individuals. Customize the frequency and the accompanying message to give context about what you're sending.

8 Configure access & permissions

Finally, add users and configure what they can see in Explore. You can customize different levels of access varying from Viewer to Editor or Admin.

STEP 4

Communicate and enable your team

Now that you have all your new reports ready to go in Explore, consider developing a communications and enablement plan to give your team a heads up about the coming changes. Prior to launch, set aside time to remind your team about your big picture vision, and how the reports you've built will help track and accelerate the progression to those goals. During this session, show off the new dashboards and do walk-throughs to demo the key metrics the team should be following. Hold office hours before and after launching Explore to answer questions that come up as people start diving into the data.

Depending on the size of your organization, consider a soft launch to a small group to gather initial feedback. Questions that come up during this time are likely questions that will surface once you fully roll out Explore. Collect and consolidate this feedback to create FAQs, help documents, and other internal resources to make the switch to Explore seamless.

STEP 5

Drive adoption and take action

Congratulations, you've successfully launched Explore! Help your team get the most value out of Explore by taking some of these small steps to boost engagement.

Make sure your team has access to the most recent dashboards. Decommission any dashboards that are out of date, and add annotations identifying the newest, most accurate reports. Remember to replace any old links with the fresh ones to direct teammates to the right place.

Automate sharing where possible and make sure data is accessible. Replace outdated scheduled reports from Insights with new recurring reports in Explore for all your key stakeholders.

Lastly, continue to evolve the metrics you look at to optimize and drive change in your service organization. Your customer service data constantly evolves as your organization scales. With Explore, you're well on your way to deepening your insight on your business and customers.

Closing

We hope this guide has given you what you need to optimize your analytics throughout your businesses by migrating to Explore. Explore is designed to scale with your organization, your customers, and their needs. The insights you find valuable today might be different from what you find valuable tomorrow! Measuring customer experience is a rewarding endeavor, and the best results come from visibility, collaboration, and iteration. Great CX is what your customers deserve, and Zendesk will be here to help you every step of the way.

Learn more at: www.zendesk.com/explore

For more help resources, visit the Explore Help Center.

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