



Make your work *flow*:  
5 steps to scale your  
support operations

No matter how simple the question, every customer should get the answer they need in a way that leaves them feeling taken care of. Yet, for growing businesses, figuring out how to effectively field every customer service inquiry becomes more challenging.



Having the proper workflow tools will help your teams with a number of business processes like fielding common questions through an FAQ, routing requests to the right agent, ensuring customers get accurate and speedy responses, and managing complex requests in a clean, simple manner.

As your customer base grows, you'll need a way to scale your team's efforts to serve more customers, without sacrificing the speed and quality that's so important to delivering a great customer experience.

To do that, one of the most important steps to take is developing an effective customer service process.

# What is a workflow?

All businesses have an established set of processes for accomplishing tasks based on experience and what works best for the company. They go through whatever steps make the most sense to complete a task in the moment. As an example, picture a request for a refund.

In this case, a multi-step process was completed entirely by one person. In other cases, other instances require multiple people or departments to take action and align on an outcome, resulting in dozens of steps to complete.



# Why it matters in customer service

A common consequence of business growth is that tasks that could once be completed with a simple workflow start to require a more complicated one. Businesses that could once handle every customer service ticket by having a devoted agent respond personally—figuring out the approach that made sense as they went—start to realize that model doesn't scale.

When your business reaches that point, taking time to be more intentional about ways to optimize your existing process to scale comes with a number of significant benefits.

## It improves the speed of response and resolution

Speed of response is a key part of customer satisfaction. According to [Zendesk research](#), 65% of customers expect to get faster customer service responses than five years ago. Regardless of the format, [customers want a response](#) in less than half a day.

As your customer base grows and ticket requests increase, having a customer service representative respond to each request personally can cause ticket backlogs and slower response times. By operationalizing certain tasks and establishing standards, such as SLAs, you will be able to meet your customers' expectations, resulting in a positive customer experience every time.

## It enables your agents to focus on the customer, not administrative tasks

For small businesses with a simple product offering, getting every agent up to speed on all the common issues customers encounter is a reasonable goal. But as a business grows in complexity, you'll most likely have different agents that are better versed in some topics than others, and your agents will start to become inundated with more complex, multi-layered administrative tasks. The unique skills and knowledge each of your representatives possess isn't worth much if you don't have a quick and easy way that ensures tickets go to the person best able to solve them.

[With the right tools](#), you can identify and operationalize these tasks, such as routing tickets to subject matter experts, automatically escalating complex issues to more technical agents, and surfacing the best response to share with customers. By alleviating these types of tasks from your agents, they will be able to remain focused on the customer issue at hand. You can also use automation and AI to operationalize administrative tasks so that agents can focus on the customer.

## It saves money

When your company starts seeing an uptick in customer service tickets, you have two options to continue providing quality service: hire more people or figure out how to automate the process to enable the team you have to do more with less. Hiring more people is a costly choice, especially if you're experiencing aggressive growth.

Establishing more efficient workflows for your customer service team makes the second option possible, saving your company the cost of expanding the workforce beyond your budget.

## It reduces internal confusion

A clear workflow removes ambiguity in how to respond to each inquiry. You don't have to worry about team members scrambling to figure out what to do while a customer waits on the other line—everyone knows the process to follow. And when you automate the steps in the workflow that don't require human decision-making, your agents don't have to spend any time or energy thinking about them. They can focus on the more complicated parts of the workflow that require their expertise.

### Zendesk 2017 Customer Care Report

■ 2013 ■ 2016

#### RESPONSE

Email: Within half a day



Phone: An immediate response



Social Media: Within 2 hours



#### RESOLUTION

Email: Within half a day



Phone: An immediate response



Social Media: Within 2 hours



# 5 steps to scale your support operations

## 1. Analyze your current customer service processes.

Before you can establish a better process, you need to understand how your team is currently operating. Turn to your [customer service data](#) to identify the most common types of issues your agents are dealing with so you can create a strategy for how best to respond to each. Figure out the steps agents are taking in response to common issues so you can spot ones that can be automated or eliminated altogether. Dig into your metrics to uncover any bottlenecks that are slowing your team down. For example, if CSAT is declining, look into other metrics that may be impacting that score - has first response times increased or is it taking agents longer to resolve tickets? What do the workflows for those tickets look like? This step will help you better understand how your team works so you can codify the processes that are working and uncover specific opportunities for improvement.

## 2. Use automation to provide an immediate response to all inquiries.

Your agents will have days when they're readily available for tickets that come in, and others where they're swamped and can't respond right away. But even when your agents can't get to a ticket quickly, your customers expect a quick response. Zendesk research found that 89% not only value a quick response to their initial inquiry, but also count a quick response as a factor when choosing who to buy from.

By leveraging automation, you can make sure customers receive an immediate response to their ticket and in that same response, make an effort to resolve it before they interact with an agent. With [automation like Zendesk's Answer Bot](#), you can define a set of business rules to automatically suggest customers a list of resources based on their inquiry along with a pre-written response.

If the resources address their inquiry, the customer can close out the ticket themselves.

### How much do the following factors impact your choice of which companies you buy from?

Critically important
  Very important
  Nice to have
  Doesn't have an impact

#### Quick response to the initial inquiry



#### Smooth experience (not having to repeat information or send reminder inquiries, etc.)



Many customer service inquiries are simple, repetitive questions that don't require any special skills to answer. For busy agents, copying and pasting the same answer over and over again (or worse, rewriting it each time) isn't a good use of their time. You can also create a list of common questions you receive that don't require human expertise or specific account information to answer and then work with your team to create the best version of a response, using the examples of replies they've sent before as a starting point. When you have a strong response written for each question, your agents can [set up macros](#), which are a set of actions that can be applied to a ticket using triggers and automations.

This saves your agents time since they can get to work on the issue knowing that the initial set of proposed solutions didn't work for the customer--and it improves the customer experience because it confirms the customers' issues were heard and you are proactively suggesting solutions they can try for themselves as well as setting reasonable expectations (e.g. communicating an SLA of 48 hours) for when they'll hear back from an agent.

### 3. Develop a process to assign the best contact for every ticket.

Every agent on your team has unique strengths. Joe may be awesome at calming down angry customers, but hate dealing with problems that are more technical whereas Suzy finds angry customers stressful, but is a wiz with technical puzzles. If you can make sure agents are consistently assigned the types of tickets they're most equipped to handle, you accomplish three important things at once:

1. Your agents get the chance to shine by doing what they're good at.
2. You reduce agent stress levels and ticket handle time.
3. Your customers get a better experience because they reach someone with the right skills and knowledge on the first try, leading to a better and faster resolution.

This is another step where your analytics can help. Using a combination of employee input and data to identify the unique strengths of each of your agents can save your agents and customers from a bad experience.

Once you've established the main skills and knowledge areas of each customer service agent, you can use [skills-based routing \(SBR\)](#) to label each agent in your system and automate the process of getting the right tickets to the right agent. Instead of everyone on the team reviewing requests that comes in and deciding which ones to claim manually, your customer service tech will immediately identify which agent best matches the customer's need and efficiently get the ticket to the right person.

### 4. Keep your customers informed about your processes.

[Triggers](#) can help you manage your processes and operations and improve your customer satisfaction by automatically performing actions whenever a ticket is created or updated with specified conditions.

For example, you can set up triggers to automatically update the status of a ticket based on a set of criteria. You can also use triggers to notify customers if and when you'll be out of office, to send customer satisfaction score follow-ups, to route priority customers to a specialized support group, or to notify agents when a problem ticket has reached a certain number of incidents.



## 5. Make your workflow transcend across channels.

Every good customer service agent knows that you can't just think about what the experience looks like on your end. The experience of the customer has to be a top priority when developing any customer service strategy.

That's why you also need to consider the customer journey. Think about what their step-by-step experience looks like each time they reach out to your company. A big part of thinking through the customer journey now means considering the different channels customers use to reach out to you, and how they all connect (or don't).

When a customer contacts your business over social media, is your response to direct them toward the best phone number to reach an agent? If so, do you have a way to make sure the agent has background information on the customer and what they already said to you on social media?

Most of us have had the experience of repeating our problem multiple times to different customer service agents. It's a waste of time and one that makes the customer service experience more frustrating.



[of consumers say they want to be able to move between customer service channels](#) without having to repeat themselves.

If the customer journey you create doesn't provide a way for agents to connect the dots (and your data), your customers will have to do unnecessary work that creates a worse customer experience. To get a complete view of your customer's journey, surface relevant information from other systems, such as purchase history, directly within your agent's workspace so that they can respond with context. [Zendesk's Sunshine](#), an open and flexible CRM platform, is built on AWS and lets you seamlessly connect and understand all your customer data—wherever it lives. When you have your customer data all in one place, it gives a three dimensional view of your customer and gives you the freedom to build whatever you want, however you want.

All the customer service processes you create should take into account the multiple channels your customers will use to contact you. To make sure you create a seamless experience across channels:

- **Invest in [omnichannel customer service technology](#) that makes it possible to track the interactions your customers have with your brand across channels in real time.**
- **Make sure all of your agents have easy access to the information on every customer interaction, so they can stay up to date on the status of the customer's issue.**
- **Make consulting customer information a part of the customer service workflow, so every agent goes into each interaction fully equipped with knowledge of what the customer is going through.**

Often, one of the most important parts of providing a good customer service experience is making sure the customer feels heard. By ensuring agents can show they know what a customer has already said, you prove to them that your company knows how to listen.

# A good workflow empowers your team

## A better workflow delivers benefits all around.

Your agents will have a clearer process with little room for confusion and they'll deal with fewer frustrated customers, meaning less stress and a better day-to-day work experience.

Your company will be able to deliver a more consistent customer experience at scale and empower your agents to work more effectively, without having to hire more customer service agents. Not only that, you'll save money without risking your brand's reputation in the process.

Perhaps most importantly your customers will get the answers they need faster, through whatever channel they choose. This leads to higher customer satisfaction in response to each ticket and more customer loyalty over time.





# How to get started

Implementing a better workflow starts with analyzing your current processes, identifying bottlenecks, and making a plan for how to do better. That's the human side of things. The next step is having the right tools to make it work.

For growing businesses, you need a customer service software solution that enables you to:

- **Scale your customer service efforts to meet increasingly complex needs.**
- **Automate the parts of your workflow that don't require human skills and knowledge.**
- **Get the right tickets to the right agents every time.**
- **Make answers to common customer issues easily accessible to all agents.**
- **Connect all your customer service channels on the backend, so you provide a seamless experience for customers.**

The [Zendesk Support Enterprise Plan](#) delivers all that and more. It has helped businesses reduce the complexity of their customer support processes by up to 75%.

If your growing business has reached the point of needing a more sophisticated process for customer service— and the right tools to achieve it—the Support Enterprise Plan can help you get there.

[Learn more](#)