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

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

Having the proper workflow tools will help your teams with a number of business processes, such as fielding common questions via an FAQ, routing requests to the right agent, ensuring that 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 at the time. For 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 several people or departments to take action and align on an outcome, resulting in dozens of steps to complete.

A customer calls the company with a complaint that the air bed they ordered has a hole in it.

A customer service agent takes the call and listens to the customer describe the problem.

They collect and validate details of the customer's order.

They issue an apology for any inconvenience caused.

They ask whether the customer would prefer a refund or an exchange.

They create a returns label and send it to the customer so that they can return the defective item.

Once the returned item is received, they issue the requested refund.

Why it matters in customer service

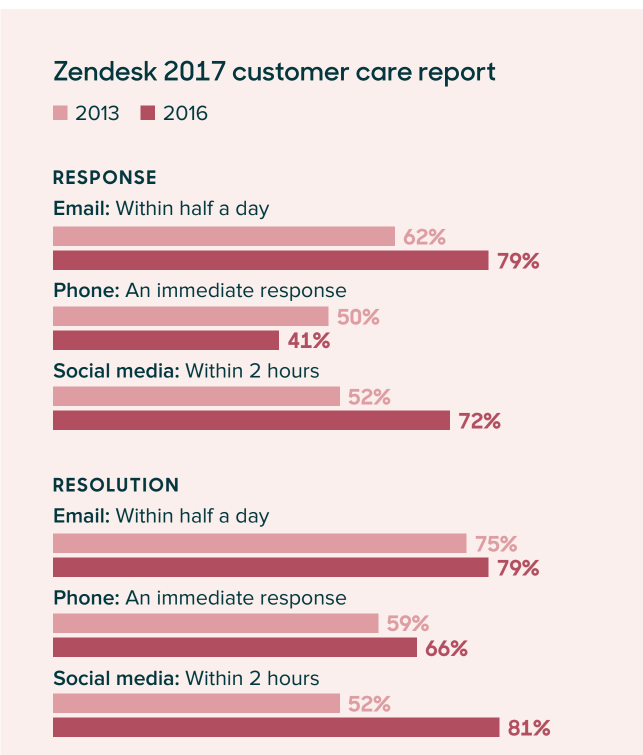
A common consequence of business growth is that tasks that could once be completed with a simple workflow start to require a more complicated one. Businesses that could once handle every customer service ticket by having a devoted agent responding personally – figuring out the approach that made sense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

When your business reaches that point, taking the time to be more purposeful about ways to optimise 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 responding to each request personally can cause ticket backlogs and slower response times. By operationalising 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 encountered by customers is a reasonable goal. But as a business grows in complexity, you're most likely to 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 possessed by each of your representatives isn't worth much if you don't have a quick and easy way to ensure that tickets go to the person best able to solve them.

With the right tools, you can identify and operationalise 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 relieving your agents of these types of task, they will be able to remain focused on the customer issue at hand. You can also use automation and AI to operationalise 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 for continuing to provide quality service: hiring more people or working out how to automate the process to enable the team that 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 about how to respond to each enquiry. 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.

5 steps to scale your support operations

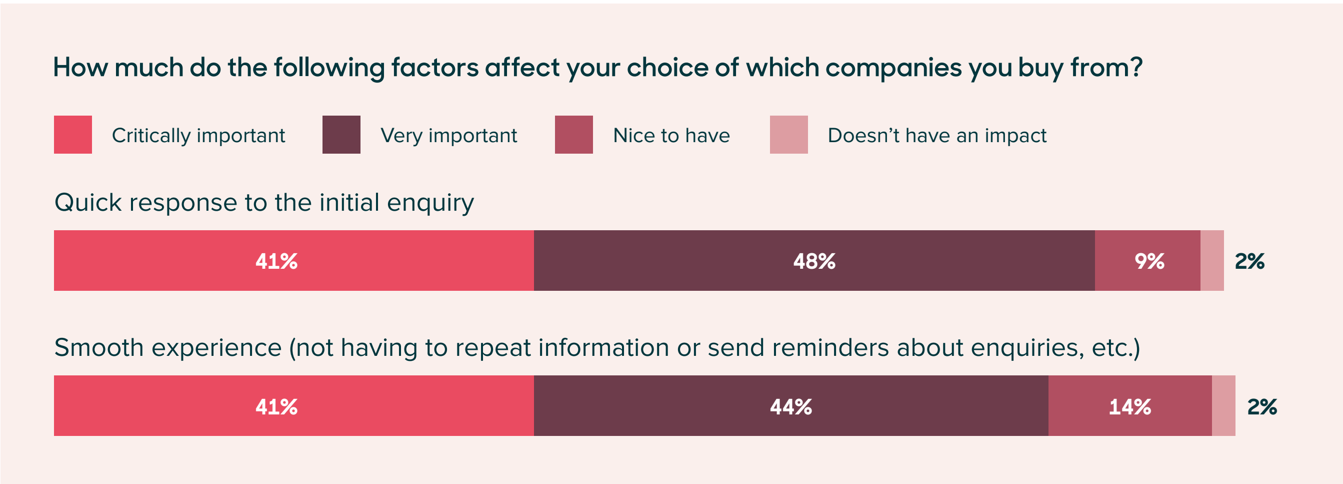
1. Analyse your current customer service processes.

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 issue that your agents are dealing with so that you can create a strategy for how best to respond to each. Work out the steps that agents are taking in response to common issues so that you can spot the 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 affecting that score – have first-response times increased or is it taking agents longer to resolve tickets? What do the workflows for these tickets look like? This step will help you better understand how your team works so that you can codify the processes that are working and uncover specific opportunities for improvement.

2. Use automation to provide an immediate response to all enquiries.

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

By leveraging automation, you can make sure that customers receive an immediate response to their ticket and, in the same response, make an effort to resolve it before they interact with an agent. With automation such as Zendesk's Answer Bot, you can define a set of business rules to automatically suggest to customers a list of resources based on their enquiry, along with a pre-written response. If the resources address their enquiry, the customer can close out the ticket themselves.



Many customer service enquiries 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 good use of their time. You can also create a list of common questions received 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 that 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 automation.

This saves your agents time, as they can get to work on the issue knowing that the initial set of proposed solutions didn't work for the customer. It also improves the customer experience because it confirms that the customer's issues were heard and you are proactively suggesting solutions that 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 amazing at calming down angry customers but hate dealing with problems that are more technical, whereas Suzy finds angry customers stressful but is a whizz with technical puzzles. If you can make sure that agents are consistently assigned the types of tickets they're most equipped to handle, you will accomplish three important things at once:

1. **Your agents will get the chance to shine by doing what they're good at.**
2. **You will reduce agents' stress levels and ticket-handling time.**
3. **Your customers will 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 come in and deciding which ones to claim manually, your customer service tech will immediately identify which agent best matches the customer's requirements and get the ticket to the right person efficiently.

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.

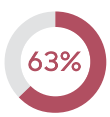
For example, you can set up triggers to automatically update the status of a ticket based on a set of criteria. You can also use triggers to notify customers if and when you'll be out of office, to send customer-satisfaction score follow-ups, to route priority customers to a specialised support group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

5. Make your workflow transcend channels.

Every good customer service agent knows that you can't just think about what the experience looks like at your end. The customer's experience has to be a top priority when developing any customer service strategy.
That's why you also need to consider the customer's journey. Think about what their step-by-step experience looks like each time they contact your company. A big part of thinking through the customer's journey now means considering the different channels that customers use to contact you and how they all connect (or don't).

When a customer contacts your business over social media, is your response to direct them towards the best phone number to reach an agent? If so, do you have a way to make sure that the agent has background information on the customer and what they've 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 that they want to be able to move between customer service channels without having to repeat themselves.

If the customer journey that 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 that you create should take into account the different channels that your customers will use to contact you. To make sure that you create a seamless experience across channels:

- **Invest in omni-channel customer service technology that makes it possible to track the interactions your customers have with your brand across channels in real time.**

- **Make sure that 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 that 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 that the customer feels heard. By ensuring that 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 that they need faster, via whichever 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 analysing your current processes, identifying bottlenecks and making plans 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 requirements.**
- **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 at the backend so that 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

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