zendesk sunshine

Go beyond support: Top five use cases for an open CRM platform

01 The customer data landscape

In today's world, customer experiences are more important than ever before. The rise of the public cloud has created an explosion of new digital products and services customers have right at their fingertips. This has forced many brands to compete on the basis of customer experience—in fact, according to Forrester CX Index data:

5x

"Companies that deliver superior CX grew revenues five times faster on average than their competitors with inferior CX"

The Five CRM Trends In 2019 That Will Shape Engagement, Relationships, And Revenue, January 2019, Forrester

Now think of all the ways customers engage with your business: via mobile apps, over social media, and across support channels like live chat and voice, and so on. This has created a never-ending stream of customer data that must be harnessed to create a differentiated and personalized customer experience. But when this data is siloed across systems and applications, it's not easy to understand who each customer is and how he or she interacts with your products and services. And without connected customer data, it's a tall order for businesses to make each customer interaction feel truly personalized.

This need for connected customer data has exposed the limitations many organizations face with traditional CRM platforms. These technologies were designed for a different era of customer relationships and weren't built to handle the volume and diversity of today's customer data landscape. As a result, many organizations are left in the dark—disconnected from a wealth of information they need to deliver personalized customer experiences.

02 Step into the light with an open CRM platform

That's why Zendesk Sunshine, our new CRM platform, was designed to be open and flexible, allowing you to connect and understand all your customer data in any format—wherever it lives. It's fast, powerful, and gives you the freedom to build amazing user experiences for everyone in your organization.

Supercharge productivity in the agent workspace with Zendesk Support and Chat apps powered by Sunshine.
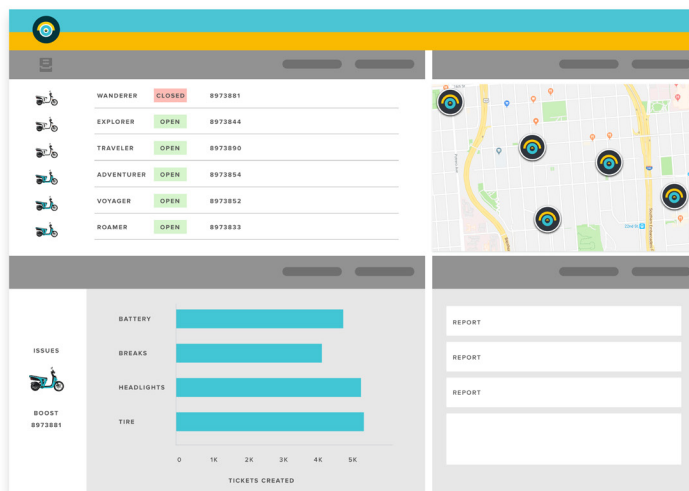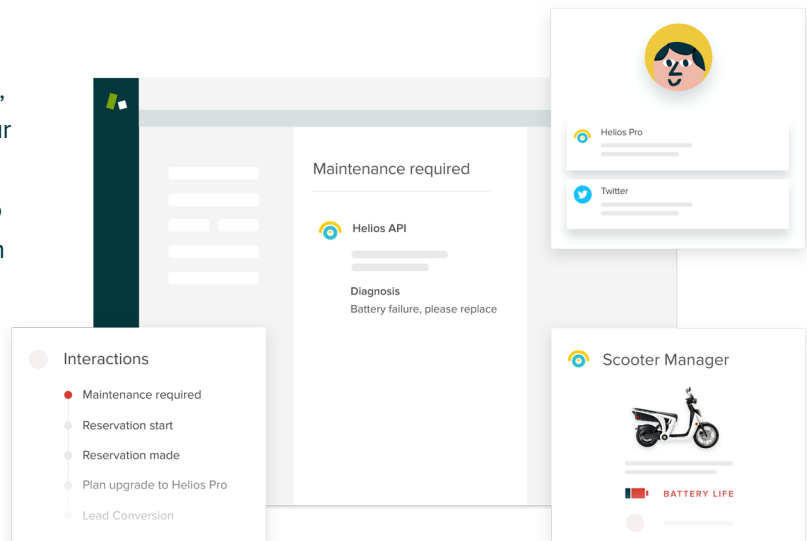
Build custom applications for additional use cases—like asset management—and let Sunshine help you go beyond customer support.

03 Get a complete view of the customer experience

Traditional CRM platforms have promised a 360-degree view of the customer for decades. But customer data is more scattered than ever before, and using proprietary data models and programming languages makes it hard to build modern applications.

To help you build modern CRM apps, Sunshine lets you use your favorite developer tools and gives you a connected view of the customer experience across profiles, events, and objects.

sunshine

aws

ZENDESK APPS

CUSTOM APPS

CUSTOMER DATA
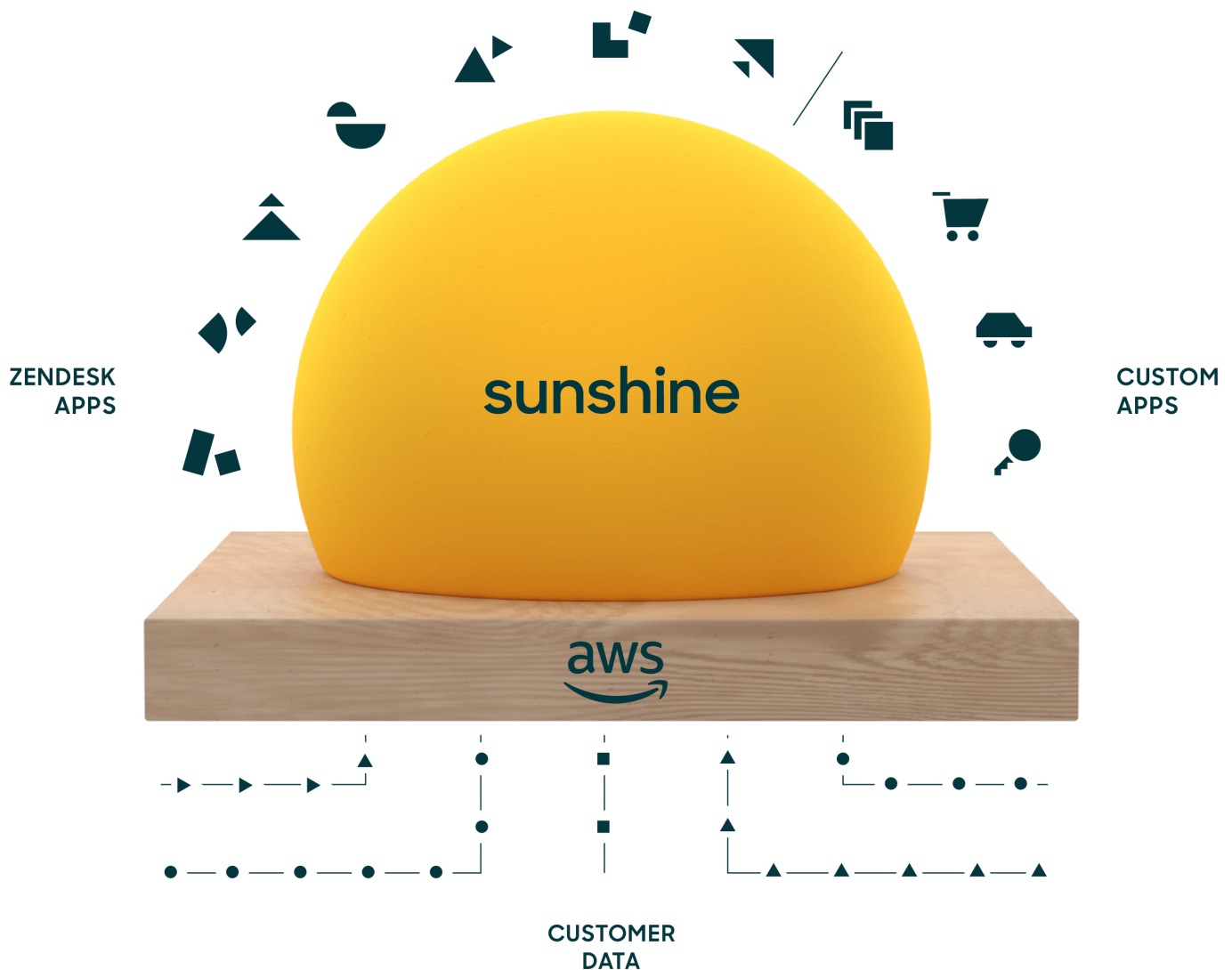
Profiles

Combine attributes from internal sources and third-party applications and link them to a single user identity to better understand who your customers are.

Events

Capture every interaction—like shopping cart, web, or mobile activity—to can better understand how customers engage with your brand across the entire customer journey.

Custom objects

Store and connect business data, like products and order history, to better understand how your customers interact with your products and services.

With Sunshine, businesses can break free from the limitations of traditional CRM platforms and customize their technology to reflect their actual customer relationships—all to help shed light on the customer experience.

04 Go beyond support with Zendesk Sunshine

Sunshine enables businesses to connect all their customer data for greater customer context and improved internal productivity. By powering custom applications both inside and outside of Zendesk, Sunshine can help accommodate use cases across the entire customer experience.

Assets and devices

Track the history and health of your products, assets, or connected devices to get full context about the customer.

Product and orders

See the entire order lifecycle, from check-out to delivery for a more personalized support experience.

Customer interactions

Get the full scope of the customer lifecycle with eyes on every interaction across the entire customer journey.
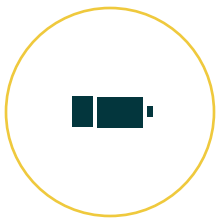
User and account management

Manage account hierarchies and complex user relationships.

Product troubleshooting

See plan details and click paths for your users.
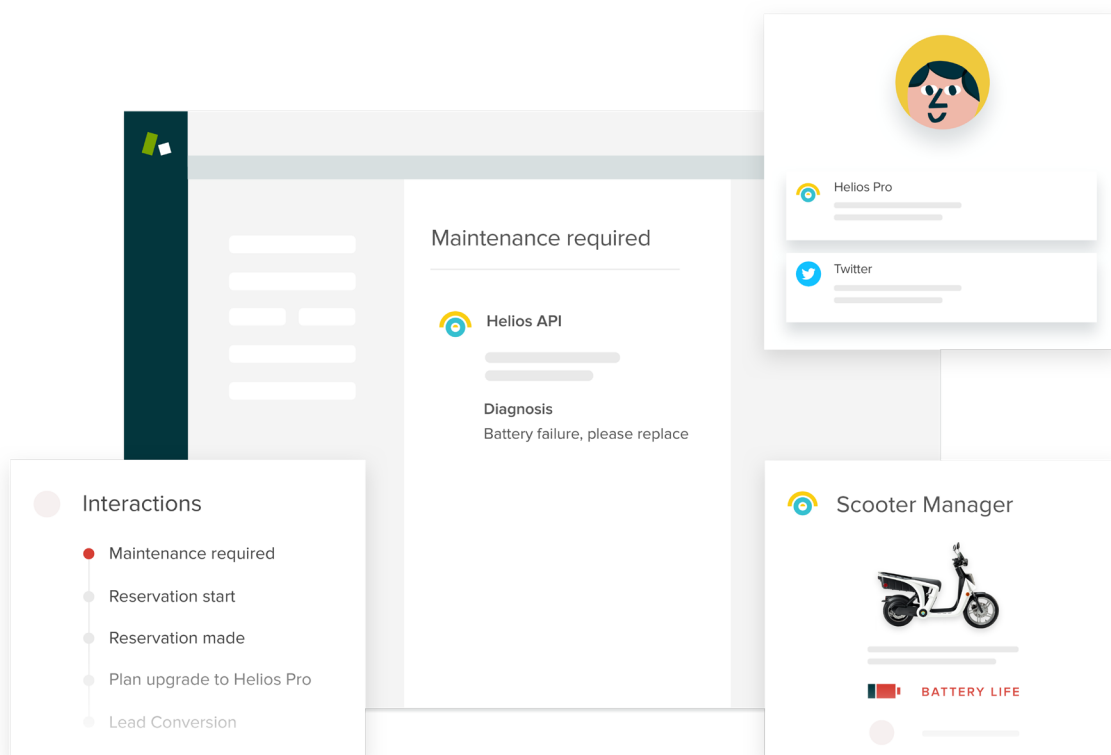
Assets and devices

Track the history and health of your products and assets

Today's customers use dozens of data-connected products each and every day. From traditional physical assets like vehicles and kitchen appliances to devices like phones and smart watches, understanding the health of customer assets from a customer support perspective is more important than ever before. Agent workflows can benefit greatly from having details of the asset's "vitals" on hand, such as the battery life, software versions, tire pressure, and more.

Linking devices like employee laptops and field equipment with IoT sensors can handle issues that

are often reserved for an IT Helpdesk, like ensuring that employees are using the most up-to-date software or have specific applications installed. All of that information can be shown alongside a Zendesk support ticket, providing all of the context agents need about their customer and the products, devices, or equipment in use.

For those who keep a close eye on the health of their assets, they can even proactively monitor a device's diagnostics and address issues before they become a problem. A trigger can alert agents to a problem with an asset's health or if it's in an undesirable location.

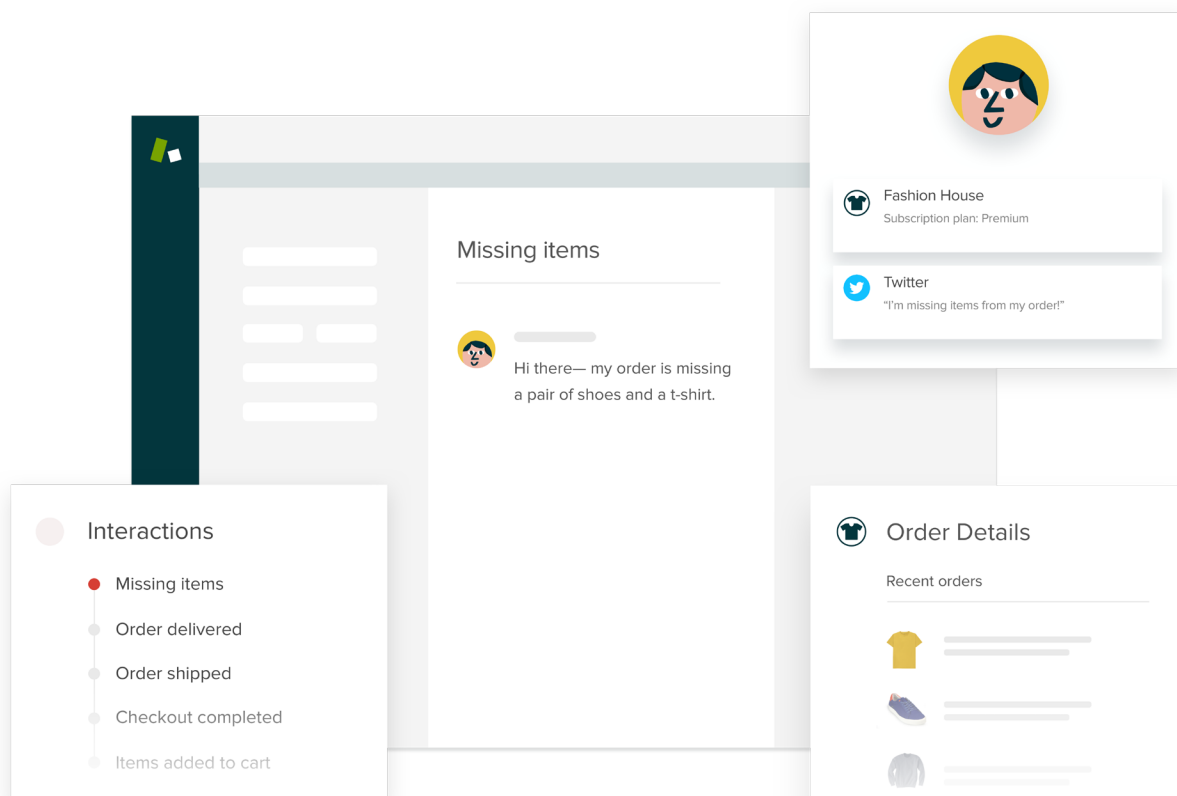Maintenance required

Helios API

Diagnosis
Battery failure, please replace

Helios Pro

Twitter

Interactions

- Maintenance required
- Reservation start
- Reservation made
- Plan upgrade to Helios Pro
- Lead Conversion

Scooter Manager

BATTERY LIFE

Product and orders

See the entire order lifecycle, from check-out to delivery

Understanding how your customers purchase and interact with your products and services is a critical part of delivering a great customer experience. That means having dynamic view of the entire order lifecycle, from transaction to delivery. With Sunshine, businesses can now store their entire product catalog and track every event related to an order such as shipping, delivery, return, and re-purchasing.

This gives agents complete insight into which products are related to a support ticket and where a customer is in their order lifecycle. And for businesses with more complex order lifecycles, Sunshine makes it possible to store and manage product subscriptions and warranties and help deliver context to agents in real time, allowing them to provide a more personalized support experience.

Fashion House
Subscription plan: Premium

Twitter
"I'm missing items from my order!"

Missing items

Hi there— my order is missing a pair of shoes and a t-shirt.

Interactions

- Missing items
- Order delivered
- Order shipped
- Checkout completed
- Items added to cart

Order Details

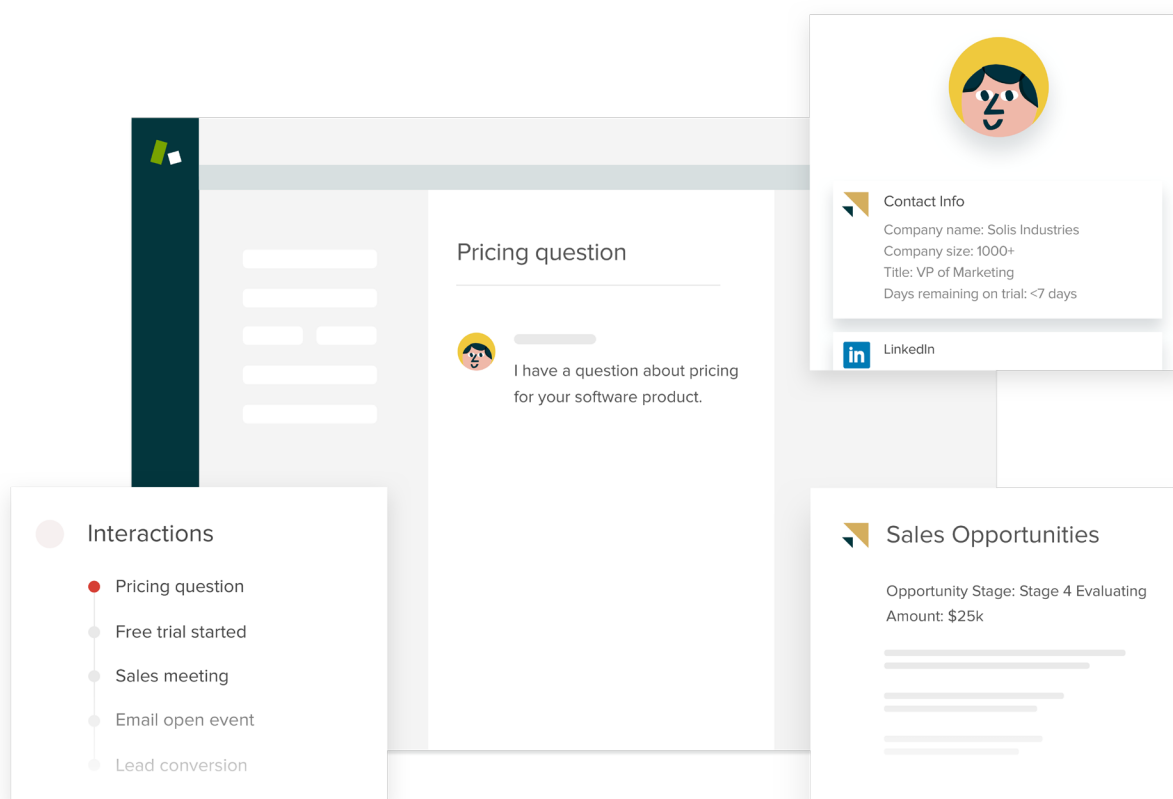Recent orders

Customer interactions

See every interaction across the entire customer journey

When building out a complete view of a customer's journey, it helps to have a historical timeline of all their digital and in-person interactions—their web and mobile activity, email opens, in-store check-ins, or anything else related to where they are in the customer lifecycle.

By connecting various touchpoints, a support ticket can give agents critical information about the customer's VIP level, loyalty status, or the account size. That information can be critical for providing personalized service in-line with the customer's expectations.

A huge value of having recorded data of the entire customer journey is the value of it to an entire organization, not just support. Customer data can be synced across the company to be used for marketing campaigns, sales opportunities, and incoming orders. It's an opportunity for keeping everyone on the same page regarding their customers.

Pricing question

I have a question about pricing for your software product.

Contact Info

Company name: Solis Industries
Company size: 1000+
Title: VP of Marketing
Days remaining on trial: <7 days

LinkedIn

Interactions

● Pricing question
○ Free trial started
○ Sales meeting
○ Email open event
○ Lead conversion

Sales Opportunities

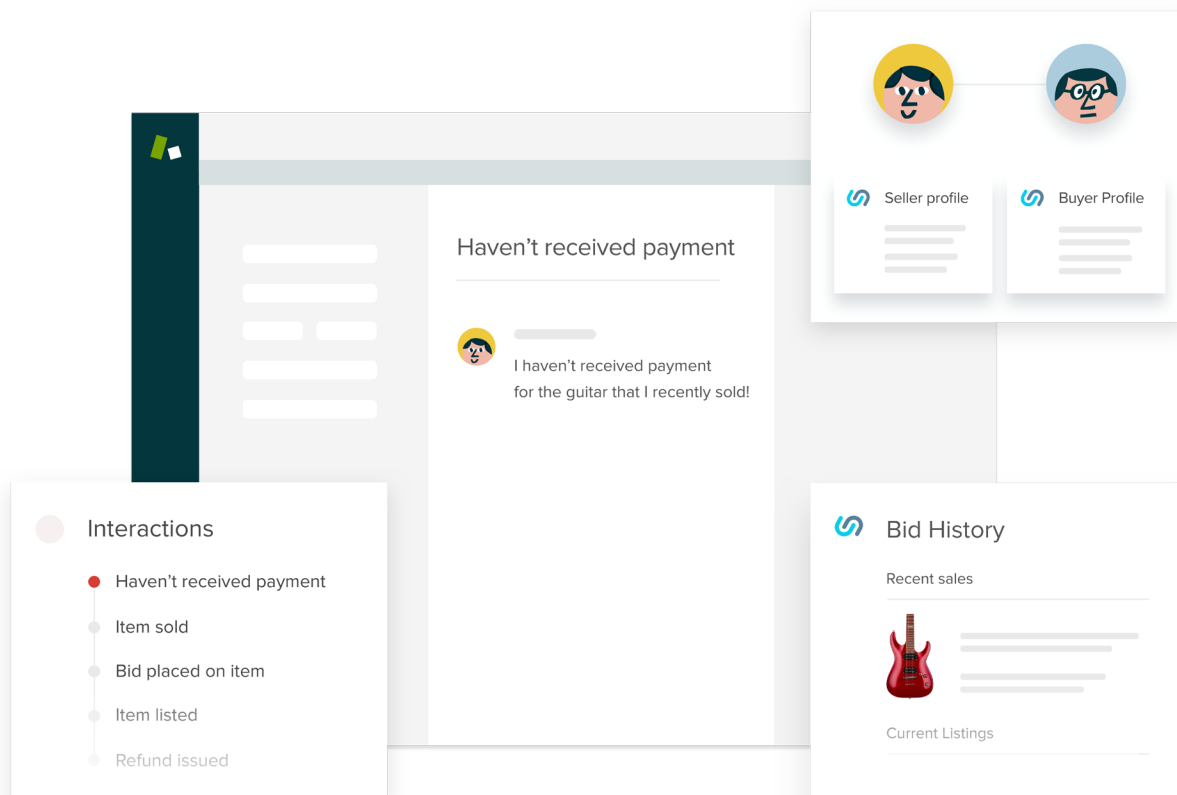Opportunity Stage: Stage 4 Evaluating
Amount: $25k

User and account management

Manage account hierarchies and complex user relationships

For businesses with more complex customer relationships—like B2B companies, multi-sided marketplaces, or multi-brand conglomerates—storing and modeling customer data can prove to be difficult. Traditional CRM platforms often force businesses into a proprietary data model designed for traditional methods of engagement and linear customer journeys.

This can make it difficult to manage relationships between customers, partners, vendors, and so on.

A modern CRM platform should be flexible enough for businesses to reflect how their unique business really works. This could include multi-tier account relationships, multi-faceted relationships between buyers and sellers, or relationships between a single user and multiple online profiles. That way, when any user interacts with your brand, it's easy to tie back to a single customer and truly understand the entire customer relationship.

Seller profile

Buyer Profile

Haven't received payment

I haven't received payment for the guitar that I recently sold!

Interactions

Haven't received payment

Item sold

Bid placed on item

Item listed

Refund issued

Bid History
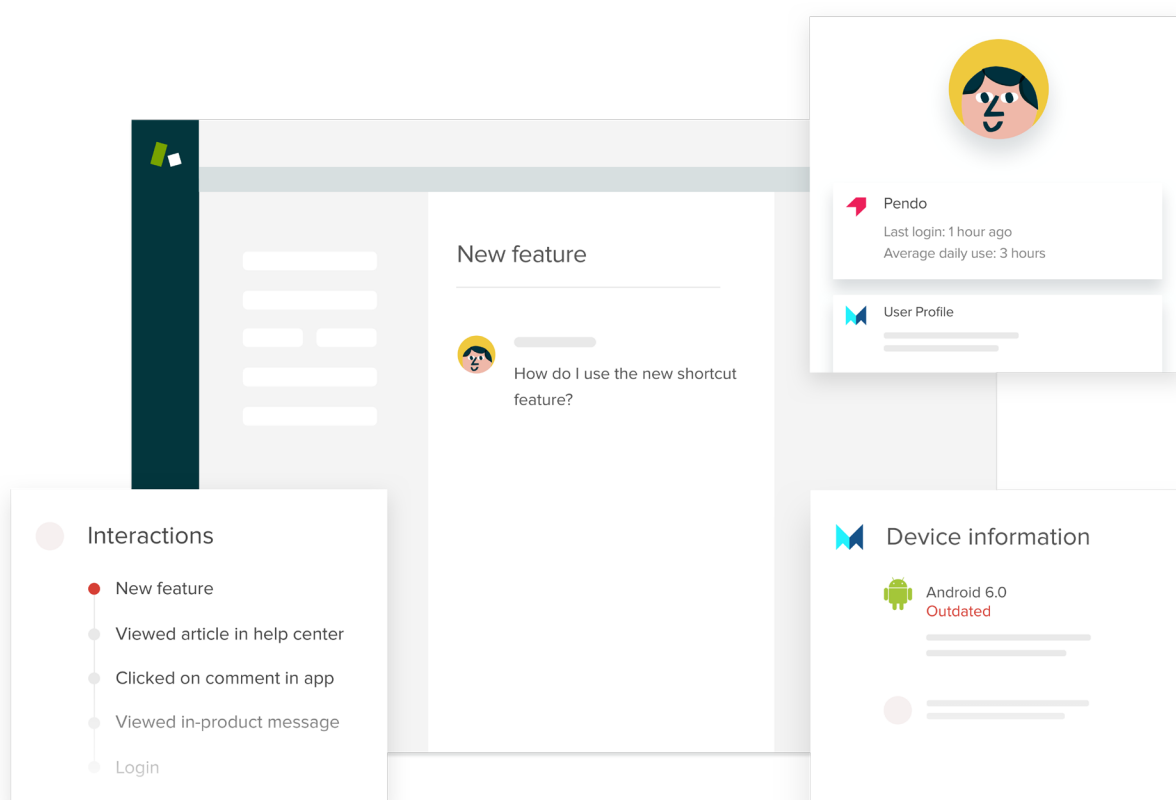
Recent sales

Current Listings

Product troubleshooting

See plan details and click paths for your users

Companies that offer digital products or services that involve web or mobile interactions should seek to understand their users' activities, like onboarding, user journeys, and feature usage. Having visibility into usage behavior can help support agents guide users to the right place during in-product troubleshooting, and give product teams valuable information for optimizing their products' usability.

Sunshine captures those details while simultaneously putting information regarding software versions, device information, and plan details in front of agents—giving them the context they need to solve customers' product issues much more efficiently. Users can also be segmented and shown in-product messages pertaining to their usage as an initiative to increase adoption and encourage engagement.

New feature

How do I use the new shortcut feature?

Pendo
Last login: 1 hour ago
Average daily use: 3 hours

User Profile

Interactions

● New feature
○ Viewed article in help center
○ Clicked on comment in app
○ Viewed in-product message
○ Login

Device information

Android 6.0
Outdated

Ready to step into the light?

Learn more at
zendesk.com/platform/features

zendesk sunshine