

# Conversational support made easy with Zendesk



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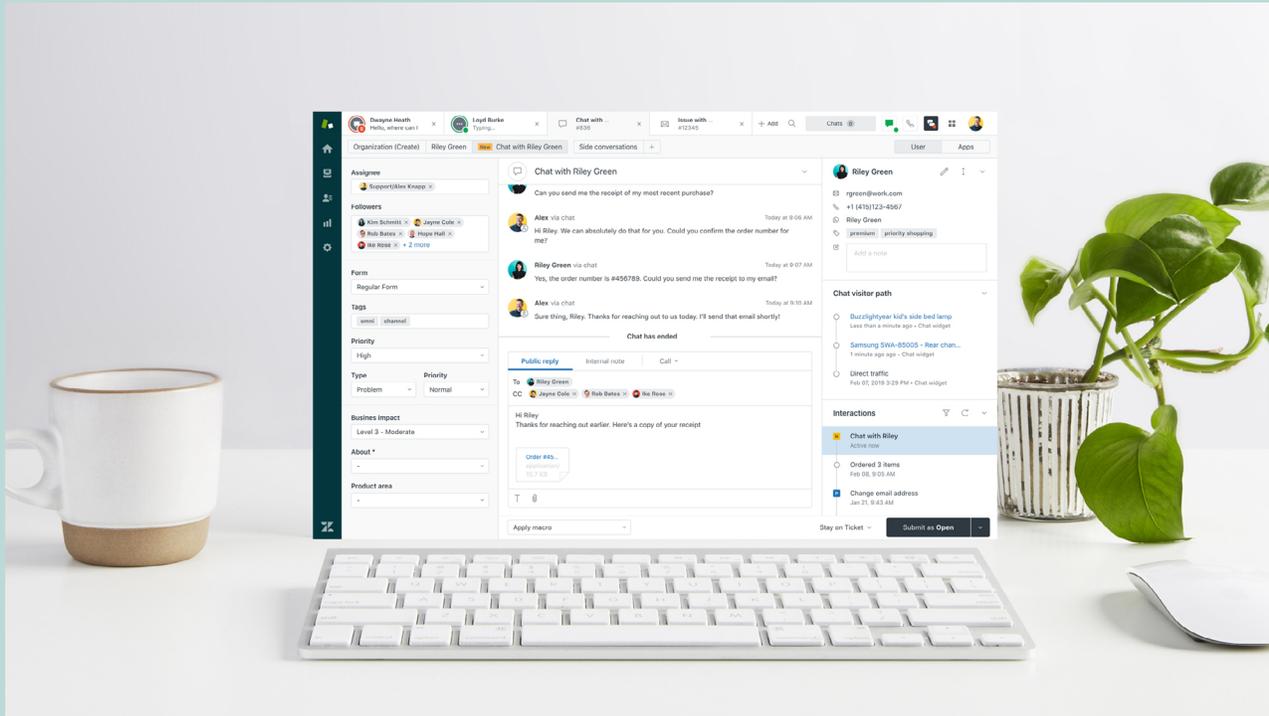
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# 01 Introduction



For many businesses, it's tough to keep up with evolving expectations around where and how your customers can get help and how quickly you'll respond. Depending on the size of your support operations, it might seem safer and simpler to stick with a single communication channel and to focus on providing really great support. That's all well and good, except that in research in the [Zendesk Customer Experience Trends Report 2020](#), which features data from 45,000 businesses, across 140 countries, high performing teams are twice as likely to take an omnichannel approach to customer support. And companies are starting to view every customer interaction that takes place across these channels as part of a conversation.

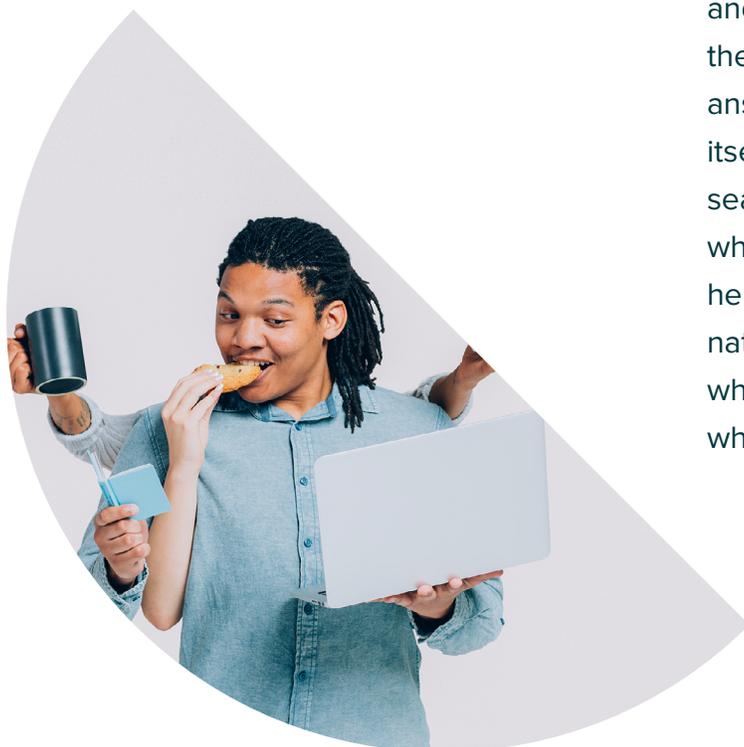
We're not just talking about having conversations with your customers over email and the phone anymore. Sometimes, customers want to look up an answer for themselves, or better yet, have a chatbot do it for them. Increasingly, they want to engage with businesses as they do with family and friends, whether that be sending a quick text or sliding into your DMs on Facebook. Or, a customer might start a conversation on Facebook Messenger, pick it up from email, and take it in another direction over the phone a week later. Regardless of channel, your customers expect consistent, fast, and personal experiences from wherever they are, without compromise. Now, *that's* what natural conversations are about.

# More channels shouldn't mean more problems

We know it can be complicated to be everywhere at once. But we also know that providing omnichannel support shouldn't create more problems. With Zendesk, customer conversations are natural because they flow seamlessly across channels, creating a better experience for both your customers and your agents. Providing great support begins with the customer—and tailoring your offerings to meet their needs.

There are a few ways to go about this. Customers often use the contact touchpoints that they prefer, or that are most familiar. Sometimes though, what we want or prefer isn't always what we need. Channel usage can have just as much to do with context and convenience as with preference. In fact, customers often change channels based on no more than what they happen to be doing.

With our phones in our pockets and the Internet on our phones, there's no bad time to ask a question. Based on the complexity of the question, how convenient it is to find help, and the context—who the customer is, what they're doing, and how urgently they need an answer—the right channel will often make itself apparent. What's crucial is to provide a seamless customer experience no matter what that channel might be. Use this guide to help determine how your company can have natural conversations with your customers, wherever they are, without letting them know what's going on behind the scenes.



# 02 Fostering next generation conversations

At Zendesk, our goal is to make it easy for businesses to have natural conversations with their customers—conversations that flow seamlessly across channels. We’ve also come up with some guiding principles to help keep your customers at the heart of the decision-making process when deciding what those experiences should look like for your business: We call them the “the four C’s.” The right answer will take into account each of the following: conversations, customer context, collaboration, and customization.



## Conversations

It's clear: A great customer experience is one that feels natural, and that's what this C is all about. Customers don't want to work hard to get answers, nor should they. And part of having natural conversations with your customers involves making it effortless for them to get help by being where they expect you to be, so they can reach out however and whenever they want.

Taking the time to consider the types of questions you see most often, as well as looking at the age and location of your customers, can be eye-opening. Industry best practices might tell you to offer a particular channel, but if, for example, you have a massive client base that prefers a mobile-first option, your support should be mobile-first too because that's what your customers expect.

Ask yourself: How easy is it for your customers to get help? Can they find answers on their own? Are they able to reach support without a laptop or web browser when technology fails? How long does it take for customers and

for agents to go through each leg of the journey to resolution? The answer to these questions might be the difference between whether you offer live chat and email, email and SMS, or perhaps even SMS and something else.

While customers expect a choice of channels, they also don't appreciate experiences that exist in a vacuum. Instead, they value being able to pick up with a business where they left off, and appreciate when a business recognizes that it's dealt with them before. This requires a [unified support](#) that connects every interaction, whether it's asynchronous or in real-time, so agents know key details—like the customer's email, order history, or why they last reached out. Otherwise, the experience isn't natural and isn't conversational. Having natural conversations with your customers provides them with the gift of an effortless experience, wrapped in personalization and fast responses, which the following 3 C's can help with.

## Customer context

Behind every customer and each interaction is a story. And customer context is about knowing that story before the customer reaches out. What's more, customers expect companies to collaborate internally so they don't have to repeat themselves and tell their story over again every time they seek help. The best way to turn a perfectly content customer into an annoyed complainer is to prolong solving their problem by asking them for contextual information they assume you already know, such as their account type or how long they've been a customer.

Imagine having to reintroduce yourself to a coworker every time you see them in the kitchen and remind them of what you last talked about. It's not natural to make a customer reintroduce themselves every time they reach out either, but that's the reality of many support experiences.

This is often because customer data lives in multiple places and teams don't have the crucial details they need to deliver the personal experience customers expect. And with companies managing [3x as much data](#) as they did 5 years ago, keeping conversations customer-centric has only become more difficult.

Again, solving this challenge starts with an [integrated support](#) that arms agents with background information and conversation history for each conversation. As such, agents won't have to search for the details they need and customers can get a more intimate experience, which boosts agent productivity and scores you customer satisfaction brownie points.

## Collaboration

[Findings show](#) that more than 70 percent of customers expect companies to collaborate on their behalf. Agents are on the front lines with your customers, but they don't need to be the only ones with all the answers. In fact, giving customers the most accurate solution often requires agents to connect with other teams, without losing context along the way or disrupting their workflow. For instance, if you're a B2B tech company and you're handling technical issues, reports of bugs, or system glitches, you'll want to be sure the right team can jump on known issues and take action when needed, whether that's a confirmation, approval, or more information.

However, inefficient processes often stand in the way of effective collaboration, which makes things complicated for your customers—[68 percent](#) of customers are annoyed when their call is transferred between departments. To deliver an easy experience that aligns with your customers' expectations and ensure that agents won't have to stress with every rise in ticket volume, businesses need to equip their support team with tools that enable them to work cross-functionally while still providing responsive support. Pro tip: Integrating your support system with your internal tools (like Slack) is a great way to share best practices across departments.

## Customization

Customers make channel decisions based in part on their age and demographics, and in part by the type of issue they're experiencing. Email or self-service might be the way to go for a question that isn't time-sensitive, but needing to exchange a dress or suit in time for a wedding is a different matter, one which will almost certainly involve the telephone or live chat. The key to having consistent yet contextually appropriate conversations based on each unique customer, use case, or channel is to customize your support environment, so an inflexible workspace doesn't get in the way. After all, high-quality support experiences on the front for your customers are next to impossible with complicated workflows on the back for your agents.

For example, you might streamline a workflow by directing tickets to the agent that's best equipped for that problem. Or, you might create unique ticket interfaces for each agent based on the type of support they specialize in.

Apps and integrations are another way agents can customize their workspace to make it easier to find relevant information for each unique conversation. For instance, if a retailer uses Shopify to manage their online orders, they can integrate that information to have more granular data on purchases a customer has made, such as order status. Besides, benchmark data shows that high performers use [50 percent](#) more apps and integrations on average, which is one of the reasons why four out of five managers plan to add additional apps and integrations to their support environment next year.

However you choose to customize your support environment, this C is all about reducing agent effort, increasing productivity, and empowering you to treat customers like humans, not tickets.

# 03 Solve for the best outcome



When it comes to selecting what contact touchpoints will be at the heart of your customer conversations, consider the business problems you're trying to solve for, and how replacing a channel or opening up a new channel might solve operational challenges. For example, these indicators might signal that you don't have the right support touchpoints in place:

- Low customer or agent satisfaction ratings
- Slow agent response times or large backlogs
- Too many drawn-out back-and-forth conversations
- Answering the same questions over and over
- Inability to prove that you aren't just a cost center and that your agents are contributing to customer conversions

## Increase customer satisfaction

Raising customer satisfaction has everything to do with providing convenient, effortless experiences. That's why channels that require the least amount of effort consistently lead to higher customer satisfaction ratings, such as live chat and messaging.

Investing in self-service also goes a long way toward customer satisfaction. In fact, high performers are 76 percent more likely to offer self-service and 60 percent more likely to have an active community, [according to Zendesk Benchmark data](#). A well-designed, well-maintained self-service option allows your customers to solve issues themselves in real-time.

Context affects customer satisfaction, too. If your customers are heavy mobile users, or if you have an app, then help should be in the app. Or, you might consider adding SMS or

messaging apps as a support channel. In fact, Benchmark data also revealed that third-party messaging has a CSAT of 98 percent, the highest across different channels.

Phone and email support aren't to be discounted here. Voice support is an important escalation channel regardless of where a conversation starts, and remains the best way to handle urgent or sensitive concerns that require a live, human conversation. Email remains a top channel for highly complex issues that require multi-step instructions or visuals. It can also yield high satisfaction ratings, particularly with tools like [predictive satisfaction analytics](#), which use AI to help you determine which contacts are at risk for low satisfaction ratings so you can take proactive steps to turn the customer experience around.

### Channels that can raise customer satisfaction:

- Chat
- Self-service
- SMS
- Messaging apps
- Voice
- Embedded support



## FOSSIL

**We want to make as many channels available to our customers as possible. Zendesk gives us a system where the customer can engage with us in the way that they want to, and we then have the capability to serve them all the way through."**

— Bernie Gessner, Vice President of Global Customer Care & Retail Operations at Fossil

## Raise revenue

Convincing the powers that be to invest in better customer service is hard when you're fighting the perception that customer support is "just a cost center." You know that your agents provide great customer experiences and influence future business, whether that's by winning a customer or keeping one from leaving, but it's tough to quantify.

The good news is that proactive support is one way to clearly prove that your team is moving the revenue needle. [Data has](#) shown that customers are three times more likely to make a purchase when you reach out proactively through live chat. By embedding chat on a checkout page, or even a 404 page,

agents have the opportunity to engage the customer before they abandon their cart or leave your site. Wherever it is that your business loses customers is the perfect location to put a live chat widget.

Any channel that promotes real-time person-to-person engagement, using tools that can track interaction outcomes, is where you can best leverage opportunities to influence buying decisions. SMS text messaging can be another convenient way to prompt customers, and of course, voice is always a persuasive channel (e.g., "Need help completing your purchase? Give us a call!").

### Channels that can impact revenue:

- Chat
- SMS
- Voice



**We want to be anywhere and everywhere the customer is able to contact us and build a reputation for providing an immediate response, no matter the date or time. Zendesk allows us to do that."**

— Dylan Henry, Director of Customer Experience at Handy

## Boost efficiency

Often, increasing efficiency while reducing operational costs is best accomplished through channels that allow customers to self-serve or that allow agents to help more than one customer at a time. This is why live chat, messaging apps, and social media are all great options for providing quick responses.

With the right tools, there are also ways to make email support efficient. Macros, or pre-written answers, help save time. Sorting tickets into views can help move agents through the queue in a

focused way, or you can set up business rules to automatically route tickets where they need to go and to ensure you meet your service level agreements. Zendesk's email, voice, chat, and self-service products all offer features that help provide more context, so that agents can see where a customer has already looked for help and not start every conversation from square one.

### Channels to help boost efficiency:

- Chat
- Self-service
- Email
- Messaging apps
- SMS
- Social media



**coursera**

**Everything from Zendesk Chat to Guide to the core Support ticketing APIs has been tremendous for us."**

— Mike Robichaud, Manager of Support Products at Coursera

## Improve agent satisfaction

Bots are great for handling busy work—the kind of things that become rote and boring and repetitive for agents. Customer service can be a tough job, and so agents appreciate it when you can automate things that take time and energy away from more challenging tasks. When you spend time on your knowledge base and invest in selfservice, you can deflect a lot of ticket volume and give agents more time to solve more engaging issues.

Something to consider is that email can be more work for agents when the contact doesn't come in through

a ticket form. Ticket forms help collect the right information for customers and allow you to create triggers to automatically route tickets to the right place. When it comes to agent satisfaction, chat is efficient and yields great customer satisfaction but, like phone support, can take an emotional toll on agents. They have to be “on,” actively dealing with sometimes angry or rude customers. For this reason, part of your channel decisions should include how you'll schedule your team to cover them.

### Channels to improve agent satisfaction:

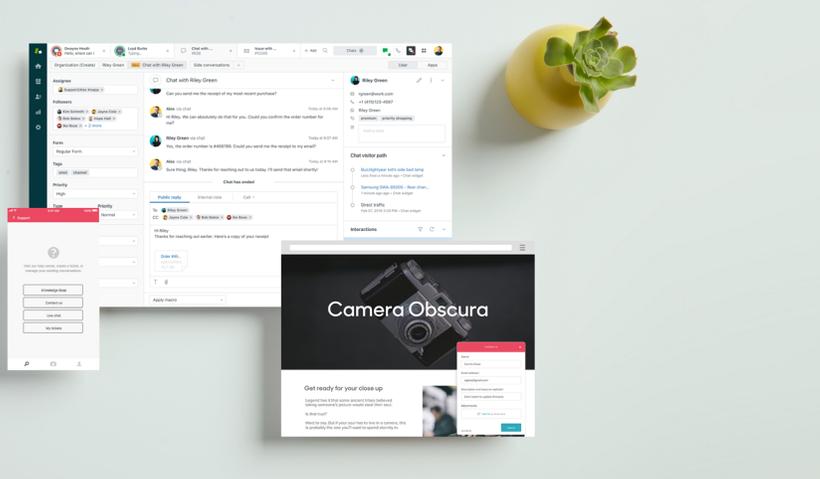
- Email
- Self-service
- Chat
- Voice



**Zendesk products have allowed us to deliver better support to deliver better support to all our clients. The agility with which we can implement new features and workflows is a key element to our success.”**

— Dan Ross, Support Operations Manager at Lightspeed

# 04 The Zendesk full-service experience



With a rise in new and emerging support channels, like social messaging apps and SMS, managing interactions across touchpoints is more difficult than ever before. What's more, customers expect availability on these channels, and on top of this, they expect personal and fast responses. To keep up with customer expectations, companies are increasingly offering service that spans communication channels and connects data so that each interaction becomes part of one longer conversation in the customer's history.

That's where the [Zendesk Support Suite](#) comes in. It's kind of like a secret recipe for the full-service experience—it unifies all your support conversations while removing the pain of implementing and maintaining whatever channels your customers want to have those conversations on. This helps to ensure that communication is seamless, personal, and efficient, which means more productive agents and more satisfied customers.

Since each key channel—whatever those are for your customers—are connected, everyone gains visibility into the customer behind the ticket and can see their full support history. Customers don't have to repeat themselves each time they contact you or move between channels. And it's easy to turn channels on and off in just a few clicks, allowing you the agility to adjust and grow alongside your customer base.



**The Zendesk Support Suite helps my team by unifying support channels in one place, so customer support can respond and offer conversational, contextually relevant experiences across any channel"**

— Jonathan Bolton, SVP Operations, BombBomb

# Unified conversations

As we've previously discussed, companies are starting to view every customer interaction as part of a single, continuous conversation. And each of these conversations takes place across a number of different channels. We enable elevated, connected conversations with:

## Live chat

Sometimes, customers just need quick access to help—not in 24 hours (like email) and not in a week (postal mail). And [half of customers](#) choose a channel based on how fast they need a response. With live chat, you can engage customers in real-time, in context, and where they already are, like checking out a dress on your app or filling out a demo request on your website.

With the rise of AI, some companies are deploying chatbots to instantly answer repetitive, frequently asked questions for increased agent productivity. Besides, 54 percent of consumers in [one survey](#) said they

would always choose a chatbot over a human customer service rep if it saved them 10 minutes.

Other businesses are using live chat to engage customers before issues arise. This might include proactively engaging customers during the checkout process, so they don't abandon their cart or filling out a form due to lingering questions.

What's more, live chat welcomes real-time analytics, which can reveal real-time insights into customer satisfaction and agent performance when managed with care.

With [Zendesk Chat](#), you can manage all chat conversations from a single dashboard whether customers are chatting with you from their laptop, mobile phone, or through your app.



## foodpanda

**Live chat lets agents handle multiple chats at once, so the wait time is reduced and customers have a better experience."**

— Jorge Vernetta, Global Operations Manager at Foodpanda

## Social messaging

In contrast to live chat, messaging is asynchronous and sessionless. This enables your business to be more available by allowing customers to reach agents outside your posted support hours.

What's more, when you communicate with your customers where they socialize—like on WhatsApp or Facebook Messenger—it becomes a personal and intuitive way to interact within the context and convenience of their lives. And [half of customers](#) say they like contacting support

using the same channels they use to have conversations with family and friends.

Adopting social messaging channels as contact touchpoints is also imperative to attracting the next generation of customers. In fact, [17 percent](#) of people between the ages of 18 and 24 already resolve their issues with a company through social messaging apps, and this number is only expected to increase.

With the [Zendesk Social Messaging add-on](#), you can easily connect with customers on their preferred messaging apps, including WhatsApp, WeChat, LINE, Facebook Messenger, and Twitter Direct Messages, and conveniently bring those conversations into a unified workspace for your agents.



Shortly after making WhatsApp a customer support channel at StashAway, we saw a shift in traffic from more traditional support channels like email to WhatsApp. It became quickly apparent to us that our clients preferred WhatsApp as a communication channel and we were able to use it to increase our engagement with them. The WhatsApp Business API has been instrumental in helping us maintain our agility and continue to drive technological innovation."

— Michele Ferrario, CEO, StashAway



## Voice and SMS

Even in the age of chatbots and social apps, a phone conversation is still a powerful way to solve a problem. For more complex issues—like getting help with bank fraud or placing an order for ten different people—customers often just need to hear an agent’s voice. In fact, [40 percent](#) of customers choose a channel based on the complexity of their issue. For others, the phone remains a preferable channel to interact with a business because it’s long-ingrained, which explains why

it’s a popular support option for baby boomers and Gen X.

And when they want to skip the small talk, text is a convenient option for busy mobile customers to get help, especially when they can’t connect to a web browser or chat within a single, live session. In fact, [Benchmark data](#) shows that the number of companies offering SMS/text will grow by 43 percent in the next year.

[Zendesk Talk](#) makes it easy and efficient for agents to help customers over the phone or via text—**from the same place they manage all other channels.**



## TAYLOR STITCH

**Zendesk Talk allows our team to deliver excellent customer experiences as our business continues to grow. Our agents have everything they need— customer history, order details, and previous tickets—all in one place, for fast, personal support."**

— Mina Aiken, Head of Customer Experience, Taylor Stitch

## Self-service and knowledge base

Everyone's a busy bee these days. Customers don't really want to talk to you in the first place if they can easily find an answer on their own. No offense—it's just the natural path of least resistance. Offering self-service is now table stakes in support and it's also a key predictor of how effectively you'll be able to [contain costs](#) as your business grows.

Besides reducing support costs, a great self-service experience can boost customer satisfaction by providing better service through knowledge management. It also

leads to increased agent engagement by reducing the number of repetitive questions agents spend time on and grows community by building deeper connections between your organization and your customers.

With all that said and done, [91 percent](#) of customers only consider self-service an option if it's easy to use and tailored to their needs. That's where a smart knowledge base can help.

With [Zendesk Guide](#), you can let your customers help themselves with a customizable help center that agents can use directly from their agent interface—it also comes with contextual insights to help ensure agents don't send articles a customer has already read and help measure the effectiveness of your content.



Investing in our knowledge base meant we saw a massive decline in the number of support requests coming in. Partners were getting what I consider to be the very best service—which is that they never had to log a ticket in the first place."

— Mike Cartwright, Chief of Partner Solutions at Expedia® Affiliate Network



## Embedded support

With customer expectations higher than ever before, customers tend to assume help will be right at their fingertips. This often involves having native support on your website or within your mobile app.

Besides, native support helps to reduce friction for customers by keeping them where they already are. And with seamless support across devices and operating systems, you're able to better maintain brand consistency.

From [our Web Widget](#), customers can access knowledge, start a live chat, message support, place a call, or just email you without leaving their experience—and high performing customer service teams are 32% more likely to use the Web Widget, according to [Benchmark data](#).



**We love the Web Widget. Users aren't forced to search or hunt for relevant information because it is presented to them."**

— Tom Saul, Head of Marketing, Flare Apps

## A unified agent experience

Connecting conversations across all of these channels requires an integrated workspace for your agents that makes it easy for them to respond, without making the experience feel unnatural for your customers. For example, an agent may need to follow up on a chat conversation via email to provide more detailed, step-by-step instructions.

In the Agent Workspace, part of the Support Suite, agents can respond to customers across channels, including, chat, email, voice, and social messaging from one place—it enables agents to continue the conversation on the channel that makes the most sense, and gives customers the convenience and personalization they expect.

# Sophisticated tools

Having natural conversations with your customers across channels requires sophisticated business tools behind the scenes that bring value without being difficult. Here are a few in our toolbox:



## Customer context

The era of omnichannel support has made providing an integrated customer experience more complicated. But customers don't care what challenges you have on your end—if they have to repeat themselves three different times in three different channels, they aren't likely to come away from the experience feeling good about your company.

Context gives agents the relevant information they need to provide faster, more personalized responses without having to ask the customer to reintroduce themselves each time they reach out for help.

We arm agents with context through an essentials card that displays relevant details on the customer your agent is serving, and interaction history that gives agents visibility into all previous customer events.



## Analytics and reporting

For conversations to happen anywhere the customer is, teams need a customer analytics tool that can keep up to effectively track and manage those interactions. Otherwise, they're essentially left in the dark.

With the right data on your conversations, you can explore things like: how a product update influences support outreach, which parts of your product or service are generating the most need for customer support, and how effective your customer service efforts really are. When handled with care, analytics can lead to increased response rates, customer loyalty, and next issue avoidance.

[Zendesk Explore](#) integrates data from every channel, so you can measure how customers interact with your brand without losing the thread—and analytics can be shared across teams for greater insights at scale.

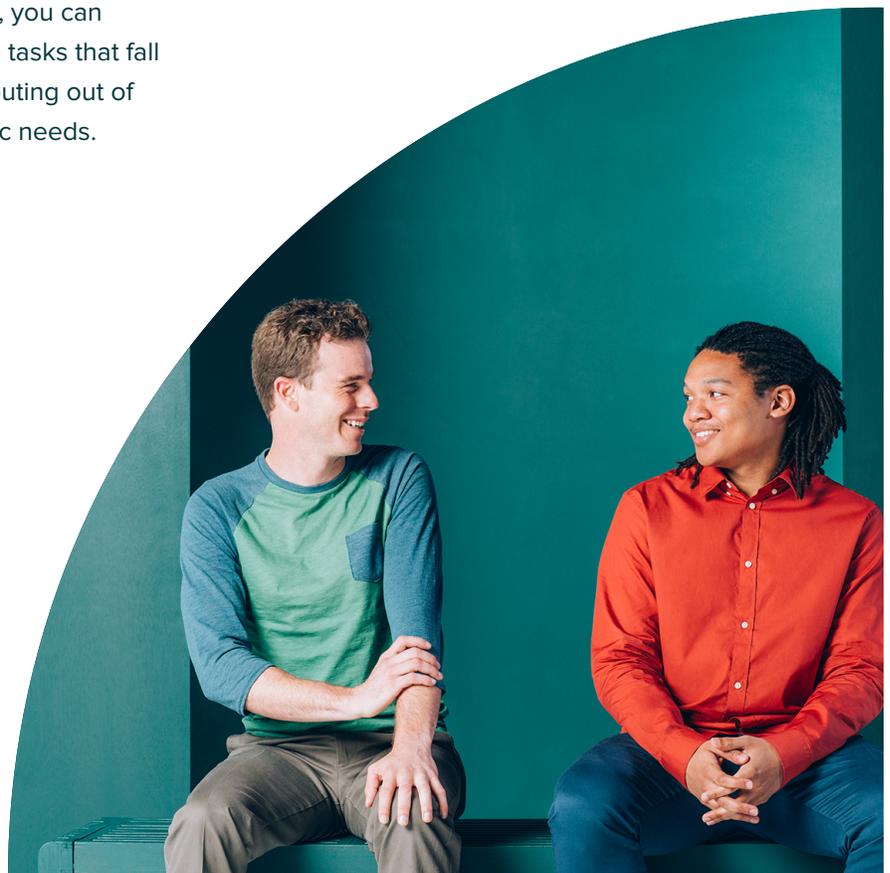
## Business rules and routing

As your company grows its customer base, the volume of conversations that come in likely increases, too. And each customer that starts a conversation with you is likely to have a unique request—one might be about shipping rates, the next about product returns, and another might be in a different language. It's not practical for all your agents to be knowledgeable about every product area, let alone multi-lingual.

Business rules and routing help streamline ticket workflows and maximize team productivity, so your support can grow with your business. For example, with [skills-based routing](#) you can assign the right agent to the conversation based on expertise—whether it's language, region, channel, or product attribute—so agents are only served tickets they can efficiently solve. Or, with workflow triggers and automation, you can minimize the number of manual, repetitive tasks that fall on your agents. Use business rules and routing out of the box, or customize them to your specific needs.

## Extended support

Use our [app marketplace](#) to integrate with hundreds of tools for things like workforce management and agent productivity, or our open and flexible CRM platform [Sunshine](#), to connect and understand data from external sources.



# Powerful knowledge

Knowledge is power. Here's how more knowledge can lead to more powerful support conversations with us:

## Superpowered agents

Speed is an important factor in whether customers are satisfied with a support conversation. When agents can immediately find answers, without having to leave their experience, it increases productivity for them, and reduces resolution time for your customers. For example, with predefined macros and article recommendations that populate right inside a ticket, agents can respond to common requests on a dime.

## Information that gets smarter

Managing a growing knowledge base can be tough. Support content is rarely evergreen—it needs to be constantly reviewed and regularly updated to stay relevant. That's why empowering your team to contribute to your knowledge base pays off. For instance, with [Zendesk Guide](#) agents can provide feedback on knowledge, ensure content is approved before publishing, and schedule reviews to get the right people involved in article creation and upkeep—so your knowledge base only gets smarter with time.

## AI-powered suggestions

[Recent Zendesk research](#) uncovered a compelling link between success, AI use, and self-service. AI excels in the kind of work that frees up agents for more complex projects and problem-solving—deploying a chatbot that automatically suggests relevant articles to customers so they can find answers to quick questions on their own, for instance.

Or, AI can help identify gaps in your help center by [suggesting new articles to create and existing ones to update](#). For instance, if a rising number of customers are asking questions about a new software update, machines can flag this trend and suggest the best article topics to effectively provide customers with the answers they're looking for.



# 05 More channels, more solutions: a checklist for success



Of course, there's no magic formula for providing beautiful support experiences across emerging channels like WhatsApp as well as traditional channels like the phone. Your success depends on how you enable your customers to have natural conversations with your business no matter where they are, what device they're using, or what their question might be.

But that also requires guiding customers to the best support channel for their needs based on your resources. For instance, you wouldn't want to list your phone number as the preferred method of contact if your agents are only available 9 to 5. Not only does strategically thinking about the right support channels for your conversations reduce customer effort, but it can also streamline your company's support and allow you to staff appropriately.

# Checklist

Use this checklist to ask questions that keep your customer at the center of your decision-making process.

## Convenience:

- Where on your site can customers access support today?
- Where would you like them to be able to access support in the future?
- Do customers have an option to self-serve?
- Is there a way to reach a human for live, fast help?
- With your current solution, are you able to recognize a customer and their support history if they contact you using two different channels?

## Complexity:

- How much of your volume requires troubleshooting and back-and-forth interaction with agents?
- How much of this volume is time-sensitive?
- Are there questions that could be automated or handled by self-service?

## Context:

- Who are your primary customers—how old are they, and where do they live?
- How does this affect your channel offerings?
- What types of issues or questions do customers most frequently have?
- Are there questions that could be automated or handled by self-service?
- Is there a way to receive immediate, realtime help from a person?
- Can customers access support channels from your mobile site or app?

## Cost:

- Are you offering the easiest and most efficient channels for customers?
- Would opening a more costly channel potentially reduce volume in other channels?
- Would a more costly channel lead to higher customer satisfaction?
- Could you offset the cost of a new channel by embedding or increasing self-service options, or automating the answers to easy questions?

The right channel mix for your customers and business is one that will help optimize your operations, not weigh them down. You'll be able to have fast, personalized, and more natural conversations with your customers by guiding them to the right channel for their issue.

The [Zendesk Support Suite](#) enables you to have natural conversations with your customers wherever they are. Channels are connected so that conversations are seamless, agents are more productive, and you can collect valuable customer information to share across your company. When you start by determining how to have natural conversations with your customers that don't expose them to the complexities of your business, customers can solve their issues with the least amount of effort, and you can provide a great support experience on any channel.

**To learn more about the  
Support Suite, [get in touch](#).**

