



4 strategies for
implementing
a world-class
customer
service solution

These days, capitalizing on innovative technology to gain a competitive edge feels like a business imperative. This is especially true when it comes to technology that touches the customer. To make customers happy, every organization needs a world-class customer service solution, preferably one that's tailored to their specific business needs.

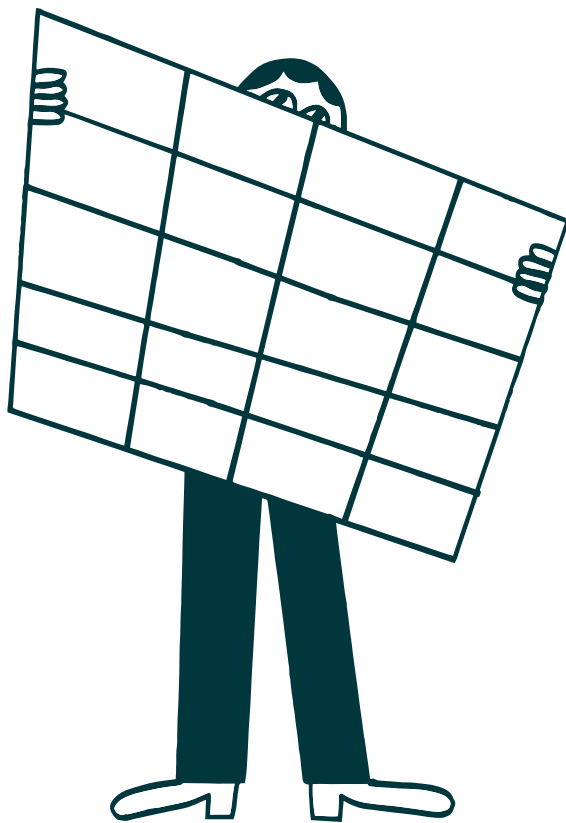
If your near-term company goals include enhancing the customer experience you deliver, you're not alone: According to [Forrester](#), 72% of businesses cite improving customer experience as a top priority. Which means you're not the only company focused on providing stellar customer service; your competitors are thinking about it, too, in increasingly creative ways. And it's not enough to adopt new customer support software and call it a day. To ensure your business reaps lasting benefits from an investment in new technology, you need a comprehensive strategy before you go live and a detailed roadmap for continuous optimization to ensure ongoing success.

Today's software solutions not only provide your customers with the flexibility needed to access information anytime, anywhere, the new technology also puts immense power in the hands of your agents. Empowering employees to excel at their jobs should be a driving motivation for any new technology. How well you remain focused on this goal and capitalize on innovative technology products that empower customer service agents will set your company apart. Which is why planning carefully before you launch is so critical.

Sharing industry best practices that sidestep common pitfalls, this guide outlines the four must-have milestones for implementing a successful customer service solution. How do we define "successful?" That's easy. Happy agents who are motivated and empowered to do what they do best: Make your customers happy. Because regardless of what you measure—reduced churn, deeper loyalty, increased revenue—happy customers deliver big returns for the business.

01

Make a plan



When your business is ready to adopt new customer support technology, your first step is to develop a thoughtful and strategic game plan. Devising a comprehensive plan means asking—and answering—a host of questions around goals, process, communication, and timing.

First, identify your unique business objective.

Start by asking, *What is the problem we're trying to solve? What kind of experience do we want to deliver to our customers?* Some companies want “Wow!” while others strive for “Effortless.” Maybe you're all about fast, cool, or satisfying. Whatever your mission, your customer support team needs the right tools to get you there.

Next, define the metrics that are important to your business.

How are you tracking them today? How will your new tools make this easier? And, crucially, how do you set up the infrastructure to ensure they will yield the data you want to capture?

Investing in and adopting new technology is an organization-wide effort that requires stakeholder buy-in and top-down alignment. Too many organizations forget to consider the impact and engagement of key stakeholders who are instrumental in driving change across the organization, including marketing, sales, and service. Don't make this mistake. Engage with the company beyond your customer support team so everyone is on the same page regarding the expectations and assumptions around new solutions. All teams affected by this new change need to be on board with the new initiative. And everyone needs to fully understand the tools and the value they offer. Make (and communicate) a concrete plan for training key stakeholders in the new technologies.

Just as important as engaging with stakeholders early on is formulating a communications plan for customer service to be implemented post-launch. What specific customer information do you want to gather using your new tools and how will you position your team to capture that data? Once captured, how will your team share out the data in ways that benefit the company as a whole? Aided by the latest customer service tools, your team is uniquely positioned to shine a light on critical information about the business, from customer concerns to product performance. Make sure you're ready to own this role.

Other things to consider:

How does your product affect your support strategy? For example, is your product simple enough that you can deflect a large percent of questions away from agents by setting up a Help Center? Or is it something technical or complex, where your customers often need to talk to someone to resolve their problems? Staff resources accordingly. In addition to forecasting staffing needs, it's important for support leaders to know how their customers want to interact with the brand so they can serve the most relevant channels to them.

Finally, develop a realistic timeline for execution.

"Realistic" will require verifying that key milestones—and especially launch dates—don't conflict with major holidays, end-of-quarter busy periods, or stakeholder vacations. To increase momentum and visibility, consider aligning your official launch with a company-wide meeting or event.



PRO TIP:

"As head of customer service, your number one reason for being is to get customers support, fast. How you show up with respect to tech, timing, and tone needs to be in sync with the mission and brand of your organization. Your team should be an insight center and a partner for other parts of the business, not a stand-alone entity. When planning for new tools, assume this stance, and you'll add value from day one."



Kathy Dalpes
VP of global customer support
at Zendesk

From strategy to application

[Learn how Airbnb](#) set up a rock-solid customer support team that grew alongside their business.



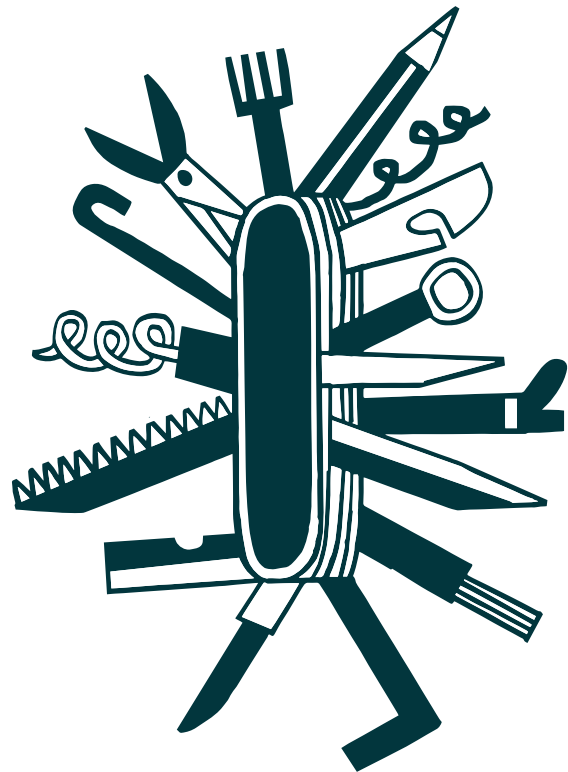
02

Choose the best tools for the job

Once you've established your game plan, it's time to translate that plan into a solution that's designed to achieve your goals.

First, evaluate which features and functionality make sense for your company. Software today can be brilliantly customized to meet specific needs, as long as those needs are clearly identified. Smart companies customize tools based on their unique brand and customer expectations, such as setting up workflows and deploying collaboration tools to help agents work as efficiently as possible.

As you plan, consider integrations with other applications to increase efficiency and transfer data seamlessly across the organization. It's likely your solution will need to integrate with a range of other critical systems, empowering agents with the context they need to deliver the best possible customer experience. These include a customer relationship management (CRM) system to house all customer information and marketing automation tools for insight into what customers are interested in and how they're interacting with your company. If you're a retail company that wants to leverage customer service software to increase conversions, you may want to integrate with your ecommerce solution like [Shopify](#), so you can provide support to customers who are on the verge of a purchase and need some guidance.



To ensure your tools integrate seamlessly with your current infrastructure, it's important to collaborate with appropriate stakeholders, including IT and operations. Considerations such as open application programming interfaces (APIs) and the ability to integrate with third-party or proprietary tools should figure prominently in your decision-making. You'll also want to sync with your company's internal data analysts. Providing the best customer experience relies on the best data. Data provide a window into how your customers use your website, products, or support channels. The decision to deploy certain solutions should be guided in large part by what data they can yield and how effectively your team—and company as a whole—can use it.

Above all, think strategically as you consider your technology options, being mindful of the changes and needs that will come with growth. Find ways to customize your solution to fit your specific business needs and establish a structure capable of scaling.

PRO TIP:

“It’s crucial for companies to consider up front the unintended consequences of new customer service tools on existing channels. With any new introduction, you need to carefully consider the ripple effect and take steps to manage the impact on existing channels and teams and on your customers.”



Brent Ludwig
Senior director of professional services at Zendesk

From strategy to application

Learn how [Ingersoll Rand](#) integrated Zendesk with third party systems to streamline workflows and arm agents with more customer context.



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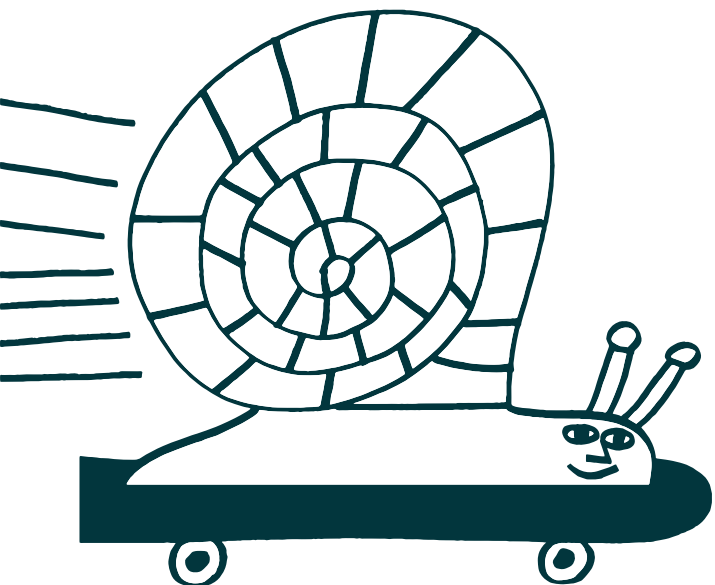
Prepare to launch successfully

Once you've identified the technology solution you plan to adopt, you need to paint a clear picture of the impact on your customer support team.

It's likely that your new tools will require an overhaul of your existing organizational structure, or at least some tweaks.

First, evaluate how your resources will be staffed: Can agents cover multiple channels, or will they be specialized? Look at how you'll set up your operations and consider a tiered support model. Creating tiers gives agents flexibility and opportunities for advancement while staying in a customer-facing role. This increases agent satisfaction and retention, and offers the options for addressing a range of customer issues moving forward. A tiered structure allows agents to streamline the ticket process, match them with issues they can quickly resolve, and make sure they're not overloaded.

You will need to decide whether to roll out new solutions in a phased approach or all at once, taking steps to ensure you don't overwhelm your agents or your customers. For B2B, lay out a clear communication plan for reaching partners, retailers, and vendors so everyone is aware of the changes to come. Bottom line: You need to make sure you're constantly communicating with everyone invested in your business and in the success of this new solution.



PRO TIP:

“Pilot programs with one or two partners prior to full implementation. Don’t pick the easiest partners or distributors, pick one easy and one more challenging, so you really test the process before you fully launch. You want to understand the issues and pitfalls completely and know how to solve them.”



Peter Neels
Customer experience
strategist at Zendesk

Whenever you roll out a new tool, you need to consider adoption. Support agents have to accept a new tool, but how they’re introduced makes all the difference. Which is why it’s critical your agents are fully engaged and trained on the new technology before launch. Through training and early exposure to the new tools, agents will understand that they’re driving toward an enhanced agent experience. You want them to fall in love with new features, so they see the value of the change and can act as evangelists for the rest of the company. If you don’t do training up front, you’ll miss a critical window for capturing buy-in from your most important adopters.

When it comes to designing and developing training content, take your time. Comprehensive training will include an introduction to new tools, allow agents to experience these tools as an end-user, teach them how to navigate the tools as an agent, provide full training on the ticket lifecycle (including creating and solving), and instruct how to merge and complete ticketing workflows. Whenever possible, conduct agent training that’s tailored to your business’s unique use-case and workflows, so agents realize from the start how these new tools enhance their ability to excel at their job.

With the help of your technology partner, conduct a needs-analysis to confirm the audience for training, the context in which they work, the business need, and the scope and parameters you have to work with. These include format, hours of training, price, and delivery date. As you analyze your needs prior to conducting training, it’s useful to answer these questions:

- **What is the role of the agent/trainee?**
- **How comfortable are they with technology?**
- **What business or workflow problems are the trainees hoping to address with new tools?**

Many companies assign a subject matter expert (SME) in the company who trains relevant teams in the organization. It’s important to have SMEs and trainers review the content and provide feedback on relevance, flow, examples, and proposed graphics.

Customer support agents are frequently the unsung heroes of an organization. Deploying new software is a time to recognize their contribution and ensure a software implementation works for them. (Bear in mind that sometimes a third party can achieve this better than management.) Make training fun. Cater the sessions with your team’s favorite takeout. Don’t be afraid to throw around some swag. Getting up and running with new technology is a big deal, so be sure to celebrate this process. Lastly, don’t aim for perfection from the start. Be patient and empathetic with agents who are learning new skills and technologies. Foster a safe and approachable learning environment where agents feel empowered to ask questions and make mistakes.

PRO TIP:

“Role-based training is essential and can be critical to your success. The more relevant the training is, the more engaged your learners will be and the more transformative the educational experience can be, too.”



Lisa Rothrauff
Manager of training and
instructional design at Zendesk

From strategy to application

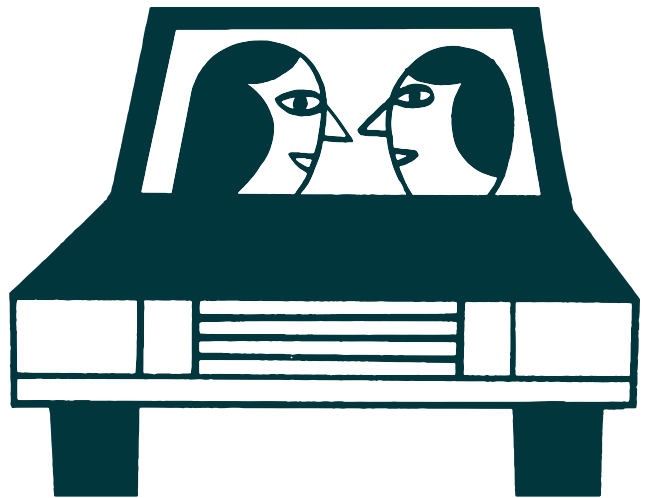
Learn how [Weatherford](#) brought their support channels and integrations into one place to provide a consistent customer experience.



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04

Keep your hands on the wheel



Given the intense focus required to launch a new customer service solution, it's easy to forget that go-live is just the beginning of the journey.

It's not enough to simply deploy, then take your hands off the wheel. Your team needs to continually test, measure, and optimize the solution over time so that it evolves with your business and continues to deliver value. To ensure you maintain maximum efficiency, you need a clear plan for maturation and growth.

As you evolve with additional channels, your customer service strategy must evolve, too. Invest the time and resources to maximize the potential of existing and future tools. Down the line you may find you want to add macros, build custom applications, and integrate with third parties. All of these steps require a detailed roadmap.

If you haven't adjusted your setup since your initial deployment a year or more ago, you may not be using your tools to their best advantage—meaning it's time to look at making improvements. By continually analyzing how your support tools are working for you, you can capitalize on new features, make agents more productive, and introduce new support channels.

Moving forward, look for ways to ensure you're getting the most out of your tools. Often it takes only minor tweaks to significantly improve deployment configuration, increase user productivity, and enhance the overall customer experience.

When it comes time to expand your team, think about the people you already have and the culture of your team. What skills and personalities will complement your existing customer service agents? Hire strategically, not frantically. As you grow and scale, add agents who'll connect with customers immediately, people who are innately curious and proven problem-solvers. Choose candidates with the personality and pizzazz necessary to go the extra mile for your customers and forge lasting relationships.

PRO TIP:

“Don’t build for perfection, build with the goal of iterating. Build in phases to account for what you need today and tomorrow, and iterate to account for what you will need in the coming six to twelve months and beyond. And, as you iterate, don’t forget to take a step every now and then and celebrate the successes you’ve won along the way.”



Roshni Sondhi,
Director of customer
success at Zendesk

From strategy to application

Learn how [Dollar Shave Club](#) rolled out an omnichannel solution over time and improved their customer experience by maximizing efficiencies and ensuring continuous optimization.



Position your team for success

The decision to deploy new customer support software heralds an exciting new chapter in a company's journey. Your customer service solution should be poised for success from the get-go, and for the long haul. Maximize your chances of success by keeping an eye on company goals and strategy and by establishing concrete plans for scaling as your company grows. With the right training and buy-in from key stakeholders, deploying a world-class customer service solution offers nothing less than the chance to revolutionize the customer experience—and your business.

Innovative and flexible customer support solutions are important to your customers, of course. Today's customers demand nothing less than 24/7 accessibility across multiple, integrated channels. They also demand an empathetic, empowered, and enthusiastic support agent at the other end of that interaction, no matter when or where it occurs. Meaning you need to value your agents as highly as you value your customers, and give them the right tools to excel at their job.

Choosing the right technology partner as you embark on this exciting journey is everything. As your company grows and changes, you need a partner with a responsive, competent customer service team that can work with you to quickly troubleshoot issues.

When selecting a vendor, approach the relationship as a true partnership, not merely a transactional relationship. Do your research and query vendors about whether they have the resources to help you get up and running. Even more importantly, ensure they have a track record of partnering with customers through change and growth. Customer support solutions are more nimble, creative and intuitive than ever before. Implement a sound launch strategy and pay close attention to optimizing your tools as you go, and your company will raise the bar on the customer experience.

To learn how Zendesk can partner with you on these strategies, check out our [Customer Experience team](#).

