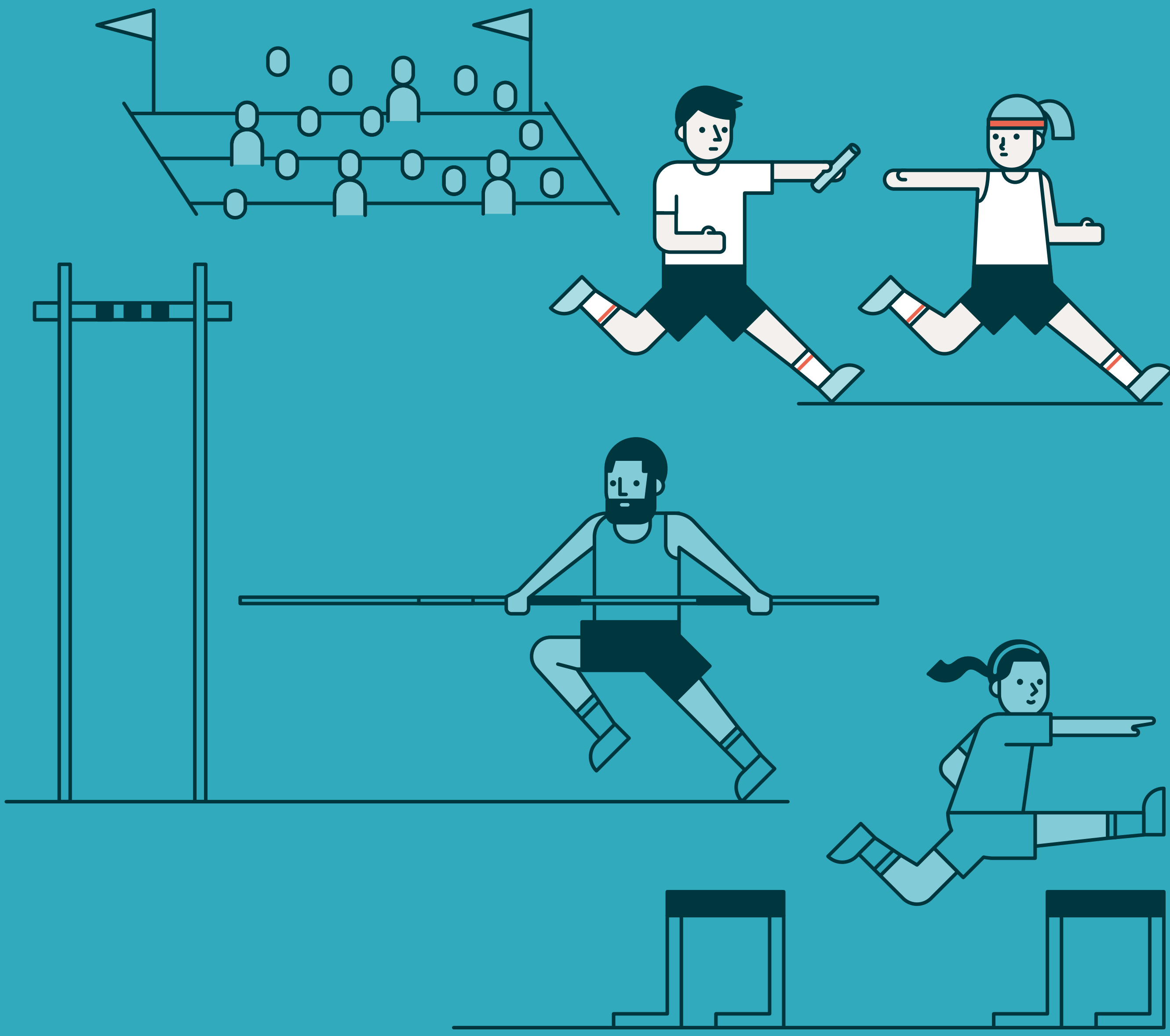
GUIDE NO. 01



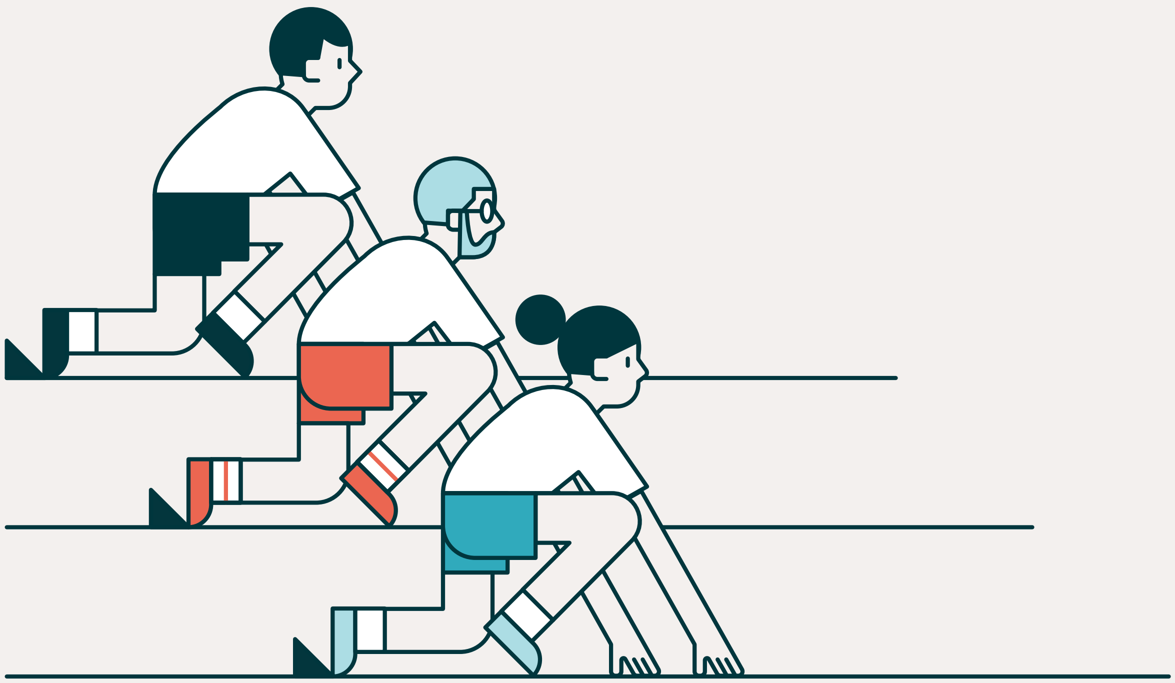
Agent experience

zendesk

To effectively meet the customer's needs, support agents must be set up for success.

That means making an up-front investment in tools and processes that enable support agents to provide the kind of support customers love, while also avoiding the kind of frustrating experiences that customer hate.

Agent experience focuses on improving the way agents interact with customers.



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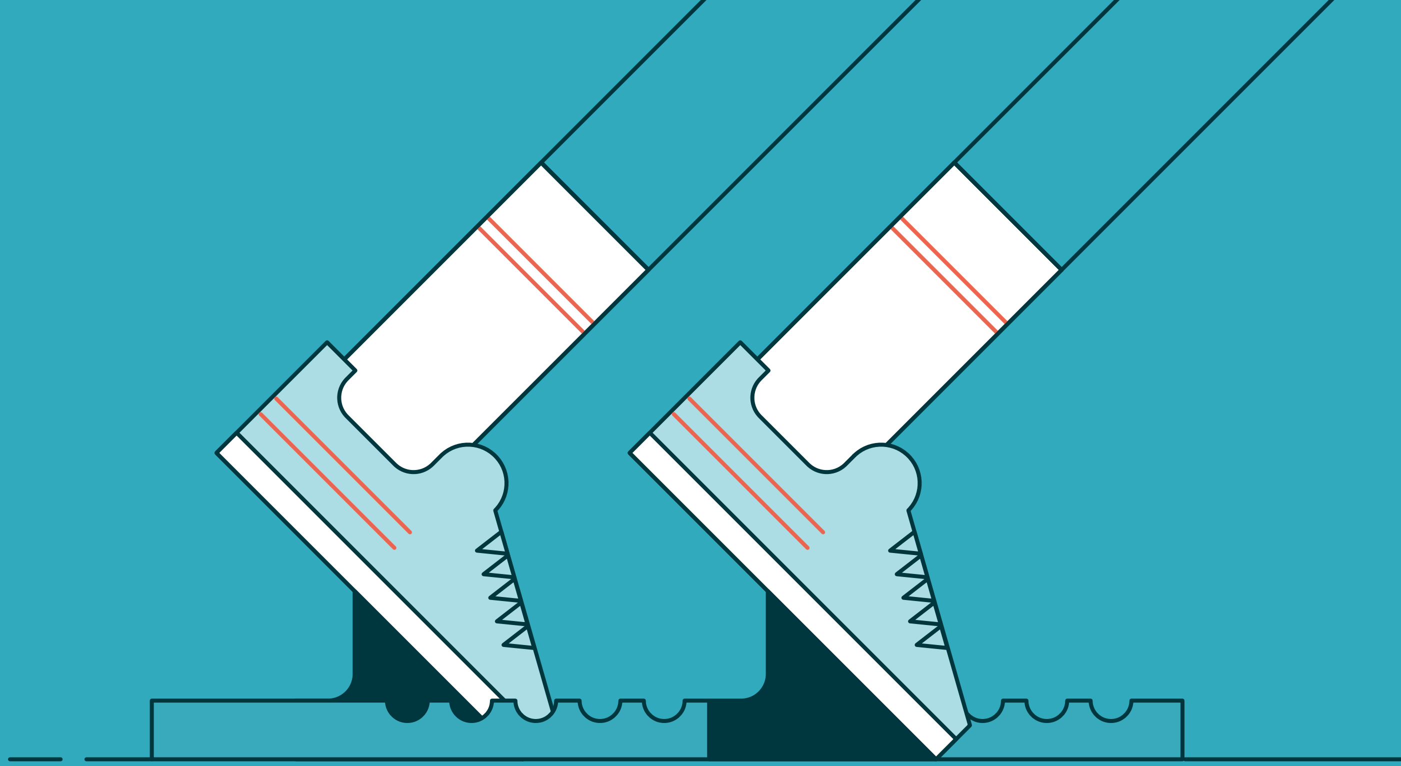


High growth

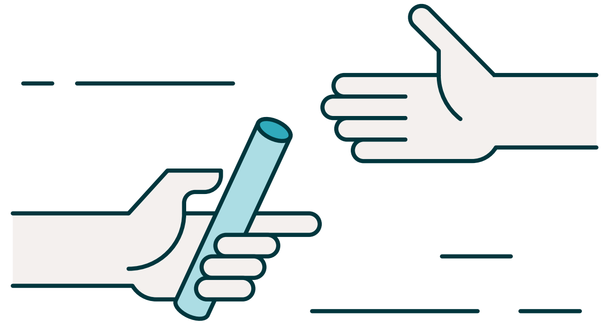
As a high-growth support organization, you have a unique set of challenges and opportunities. Clearly, something is working **because** you're in high-growth mode. The support you are providing is resonating with your customers. But the demands are increasing, too—as others continue to ask you time and time again to do more in less time, straining your support team and threatening your ability to maintain the same level of quality, much less improve.

It's a difficult challenge, but not impossible. Zendesk has compiled real-world support strategies that have helped companies just like yours—everything from hiring and training agents to creating best-in-class support strategies to providing great customer experiences.

This guide was designed with the high-growth support team in mind and is here to help you take your support to the next level.

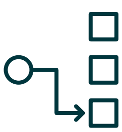
Ticket routing

Without ticket routing, many customer service departments would descend into chaos. That's because there wouldn't be a process in place to ensure that each ticket goes to the person who's best suited to solve it.



TICKET ROUTING TECHNIQUES

Here are several techniques for high-growth customer support teams:



Direct routing (Hunt groups)
Customers are given the option to reach out to the specific department they wish to speak with.

Least idle
Using an automated process, least idle is a slightly more sophisticated routing strategy in which calls are placed with the agent who's been waiting for a ticket the longest.

Least occupied
The next ticket is sent to whoever has been least utilized throughout the day.

Skills-based
Agents are assigned different skills and skill levels for each skill assigned, and tickets are assigned accordingly.

COLLABORATIVE SUPPORT

For companies experiencing some of the headaches of rapid growth, such as increasing tickets and supporting multiple time zones, a collaborative approach to support can be very helpful.

This includes:

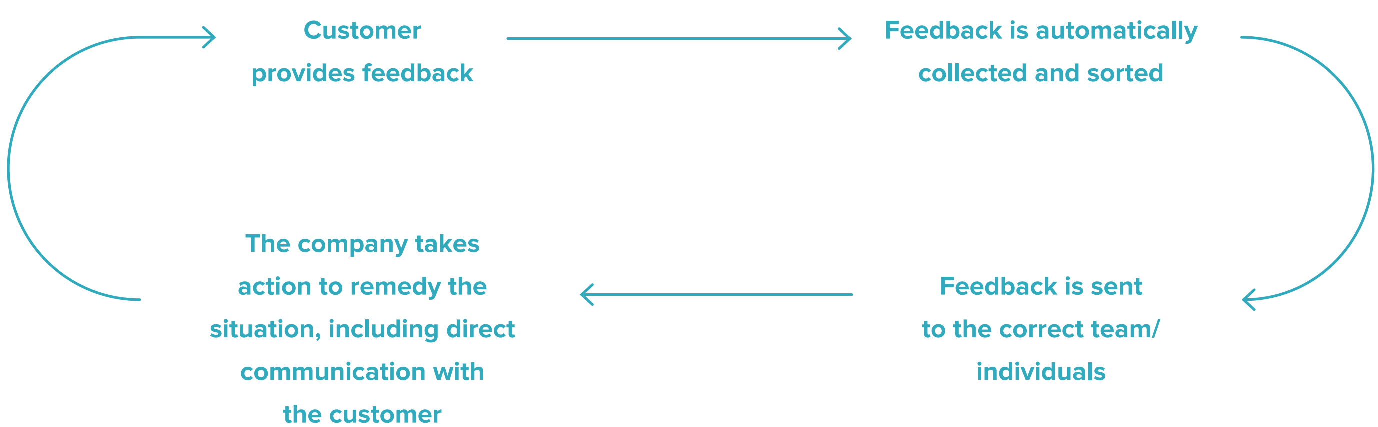
- Assigning priorities to each ticket through a triaging process (either automated or manual), ensuring the most important tickets are solved first
- Routing tickets to agents/groups best suited to solving that ticket; or if the original agent can't solve the ticket, escalating it to another agent
- Working as a group, reducing agent burnout and customer wait times

Feedback loop

Providing a mechanism for customers to provide feedback, about both their individual experiences and ways the organization can improve, is essential. But without a way to follow up on that, customers won't feel heard and you won't be able to act on their feedback. In this scenario, improving customer satisfaction isn't feasible.

CLOSED FEEDBACK LOOP

A closed feedback loop provides a way for customers to communicate with the company, as well as a method for collecting and learning from that feedback.



When used in an intelligent manner, the closed-loop approach will:

- Increase customer and employee engagement.
- Quickly help identify opportunities and make them more obvious.
- Set priorities based on customer needs.
- Promote company integrity in the eyes of its customers.
- Generate a positive return on investment based on research.
- Help drive product life cycle.
- Provide feedback to marketing and product teams, by customer segmentation.

> "At companies where strong customer feedback systems take hold, business-unit leaders and front-line employees start to own customer loyalty the same way they own their targets for revenue, profits, and market share."

Source

Internal self-service

Self-service isn't just for customers; it's also a valuable asset for agents. Having access to organized, easy-to-find information makes it possible for agents to share relevant information with customers, quickly resolving issues so they can move on from one customer to the next.

SELF-SERVICE AUDIT

- ☐ Do you have an internal knowledge base (KB)?
- ☐ Do you have online support for your agents?
- ☐ Do agents have the ability to contribute to the KB? If so, how?
- ☐ Do you have guided scripting in place to ensure that agents properly respond to customers?
- ☐ Do you have a portal where agents can view their daily schedules, news, and events?

GUIDELINES FOR A SUCCESSFUL INTERNAL KNOWLEDGE BASE (KB)

1. **Determine the objectives of your knowledge management implementation**
   For example, provide plenty of self-service content for first-response agents to have enough resources to successfully reduce the number of escalated tickets.

2. **Plan a successful implementation strategy**
   Form an implementation team (such as an executive sponsor, KB owner, IT, writers), and decide on a realistic roll-out plan.

3. **Design clear processes**
   Create guidelines for content development, content categorization, and ongoing management.

HOW TO develop useful KB content

Each piece of content should contain a single idea.

Use a templated format, and stick to it.

The style should be simple and practical, with steps for resolution explained logically and concisely.

Always consider: What is the customer trying to do? What are they asking? What was the customer experience that drove the question?

Rather than providing exhaustive descriptions, content should be as short as possible and use a direct, informal tone.

Include contextual information, such as the product, model, revision level, etc.

The content structure should be uniform and use a consistent vocabulary and taxonomy.

Include the resolution—not just how to fix the problem but the underlying reason(s) for the problem, as well.

Key takeaways

1. Ticket routing enables high growth by helping support organizations take a collaborative approach to customer service and ensuring tickets get to the agents best suited to resolve them.

2. Although many companies provide channels for customers to provide feedback, too many fail to build closed-loop feedback systems that learn from that feedback and properly communicate with customers.

3. Use the same best practices that apply to customer self-service to give agents easy access to the information they need to quickly resolve customer issues.

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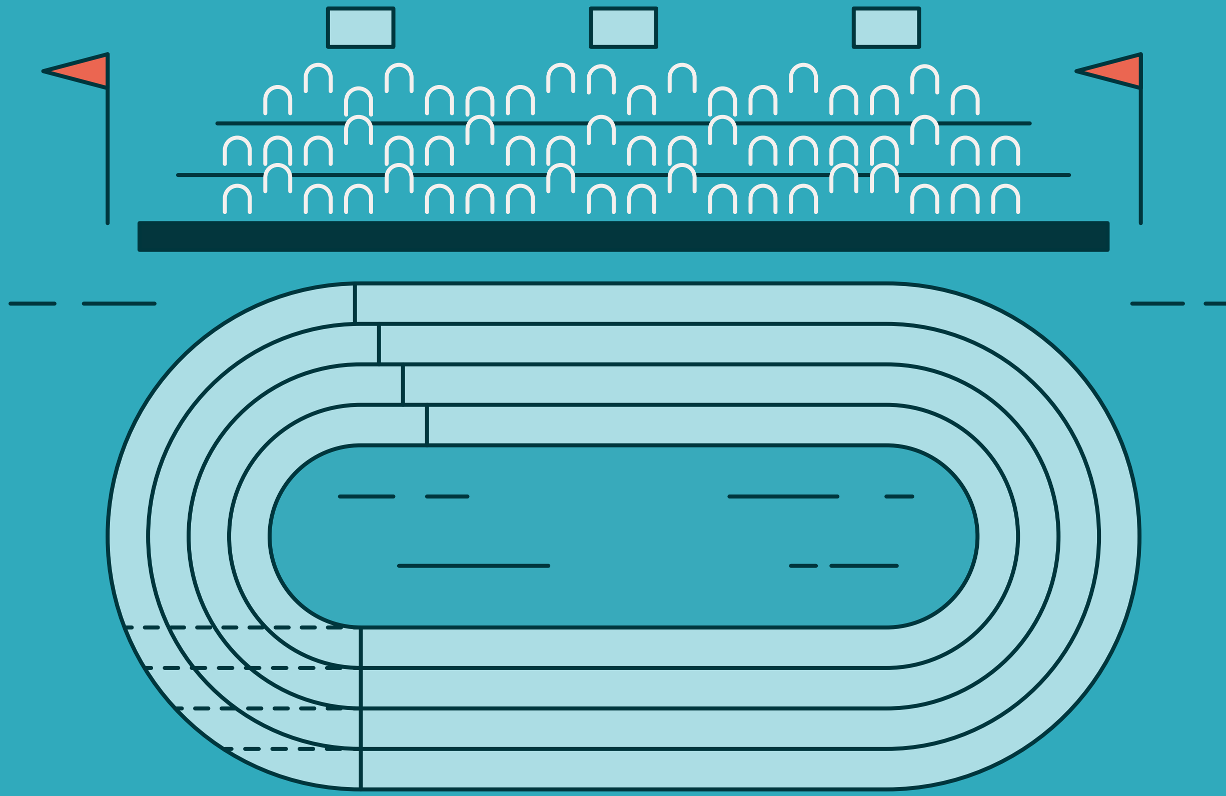


Achieving scale

As a support team looking to achieve scale, you have a unique set of challenges and opportunities. Your organization has matured to the point that it is able to deliver quality support to an ever-increasing number of customers. You know that you are able to meet those needs, but as the company moves to another level of success, the deluge of customer interactions is just around the corner. As your support structure and strategies currently stand, you know there is no way to meet future demand without finding a way to scale and maintain a high level of quality.

It's a difficult challenge but not impossible. Zendesk has compiled real-world support strategies that have helped companies just like yours, everything from building career paths of agents to escalating ticket management to benchmarking against competitors.

This guide was designed for the support team looking to achieve scale; it's here to help you take your support to the next level.

Service-level agreements (SLAs)

A service-level agreement, or SLA, is an agreed upon measure of the average response and resolution times that your support team delivers to your customers. Providing support based on service levels ensures that you're delivering measured and predictable service. It also provides greater visibility when problems arise.

SLAS CAN HELP YOUR TEAMS

Follow policy: If your company has published a standard for response or wait times, SLAs help codify those standards by priority level so you can track performance down to the minute and prioritize accordingly.

Set team goals: Even if you don't publicly declare your SLAs, you may notice that a particular response time, or wait time threshold, yields better CSAT numbers. Use SLAs to set and track team goals.

Meet obligations: In some cases, you may sell a higher tier of service or have a special class of customers with support clauses written into their contracts. SLAs can help you track these special cases, too.

Test promotions: Your marketing team might be considering advertising a faster service window than the competition. You can use SLAs to test your response and wait times before officially launching promotion.

Customer segmentation: Segment your customers based on spending or company criteria to provide a better customer experience based on a profile setting.

SLAS AND YOUR WORKFLOW

SLAs are almost impossible to maintain without being worked into your organization's everyday workflow.

Here are some examples of ways to seamlessly incorporate them:

- Organize all clients with relevant service levels, and automatically route them through the appropriate support workflow.
- Set up triggers to alert the team when an SLA is due and automatically escalate priority tickets to the top of queue.
- Set triggers for when an SLA is violated, setting off a series of triggers that let the team and managers know, subsequently enabling you to create a report to keep track of your monthly progress.

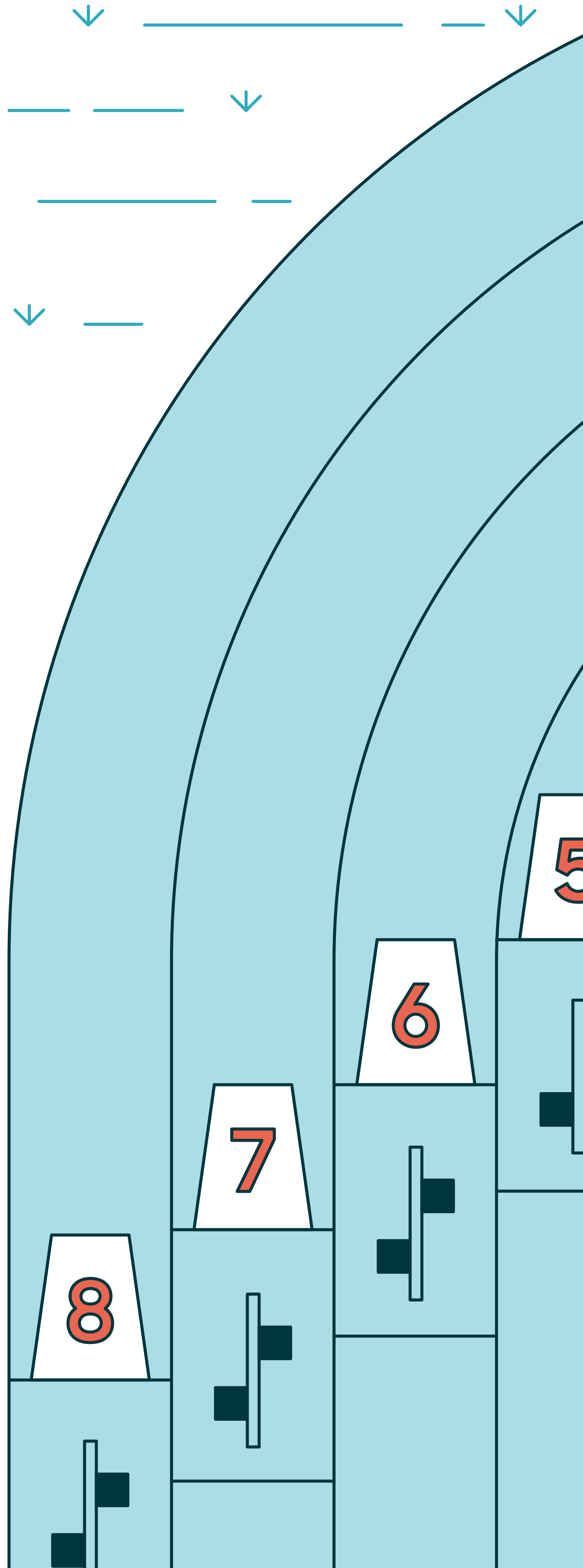
Escalation management

Not all tickets were created equally. Some are easier to solve than other. Others may indicate the presence of larger issues or originate from VIP customers. Ticket escalation helps you identify tickets that require special attention and route them to the appropriate agents.

REASONS FOR HIGH ESCALATION RATES

A high-escalation rate can indicate that systemic issues must be resolved, such as:

- Your call center agents do not have the requisite knowledge and understanding to handle complaints, so they transfer too many calls to the senior agents or higher support tiers.
- Your call center agents are not empowered to give solutions to customers, so they transfer most of the calls to someone in a higher position of authority.
- Your call center agents are not quick enough or clear enough to quickly resolve customer complaints, leading to an increase in the load and shifting calls to the seniors.



BEST PRACTICES

Escalation management is required to ensure this process is handled properly and results in happier customers and improved operational efficiencies.

Create a seamless triaging process
Define which tickets need immediate attention.

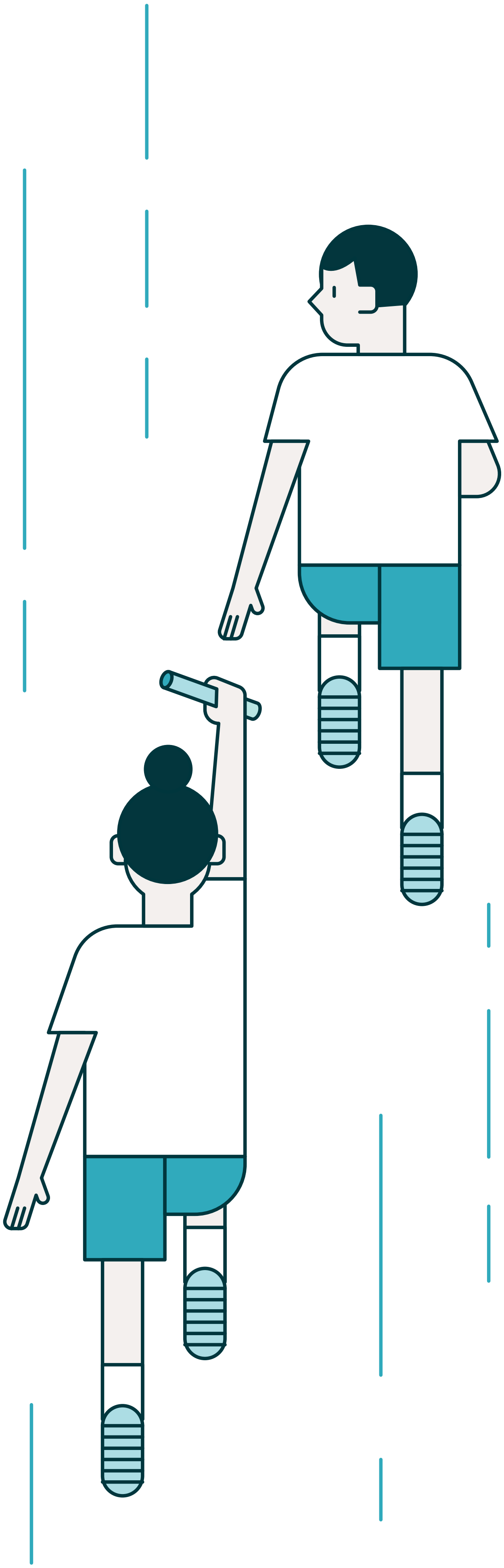
Build documentation
Escalation processes should be regularly documented and reviewed to ensure they are working in the best interests of the client and customer.

Stick to SLAs
Ensure times taken from call receipt to resolution are satisfactory and that margin for error is reduced wherever possible.

Include all channels
Escalation should be offered in as many appropriate channels as possible, including email, SMS, social media, and phone. The hours agents are available to answer calls, emails, or social media inquiries should be clearly stated and response times should be outlined when appropriate.

Be process-driven
Processes should guide the call handler to capture all relevant information to enable follow-up staff to respond effectively and efficiently.

Work together
Collaboration between parties using the ticketing system must be seamless to allow for CRM and database updates as calls are taken. Contingency plans need to be in place in case of system issues.



Operations team established

Many support organizations are only able to deal with the growing complexity of their support operations by establishing an operations team—one tasked with formalizing, constituting, measuring, and improving support operations.

OPERATIONS TEAM FUNCTIONS

Within the operations team, one or more individuals should own different functions.

Workforce management (WFM)

WFM of staff scheduling improves time management; it's an integrated and demand-oriented way to optimize staff scheduling. WFM incorporates:

- Demand-oriented workforce scheduling and optimization
- Forecasting of workload and required staff
- Employee involvement in the scheduling process
- Management of working times and accounts
- Analysis and monitoring of the entire process

Analyst
While many support leaders can glean high-level information from simple metrics dashboards, a dedicated analyst can dive into the numbers to provide insight into what they mean and how they can be used to improve operations.

Training
The training function is responsible for ensuring everyone is properly onboarded and given the skills and tools necessary to be successful. This includes everything from building out training documentation, training other trainers, and developing business process outsourcing (BPO) strategy and support.

Quality assurance (QA)
As discussed earlier, QA is necessary for monitoring and maintaining high standards. Putting someone in charge of QA allows them to focus on development and implementation of strategy for internal teams and BPO.

Customer relationship management (CRM)
While customer service can have a long-term impact on a customer's relationship with the company, it actually tends to focus on short-term interactions. CRM takes the long view, focusing on ways to build and improve long-term relationships. The operations teams should include people who focus on strategy and support through this lens.

GETTING STARTED WITH YOUR OPERATIONS TEAM

Before you build your support operations team, try to answer these questions:

- ☐ What operations support functions do we have in place for our organization?
- ☐ Do we have a dedicated team or person for training, QA, BPO, and technology?
- ☐ Do we have a dedicated person for reporting (business intelligence)?
- ☐ Does customer service have a seat at the product marketing table?

Key takeaways

1. Service-level agreements help ensure that your support organization maintains a predetermined standard of support. It can be built into the daily workflow to ensure they are being met.

2. Escalation management is crucial for helping support organizations scale, as they ensure the most important and/or difficult tickets are quickly answered by the best agents for the task.

3. An operations team helps organizations scale by reducing the increasing complexity of rapidly growing and improving operational efficiencies.

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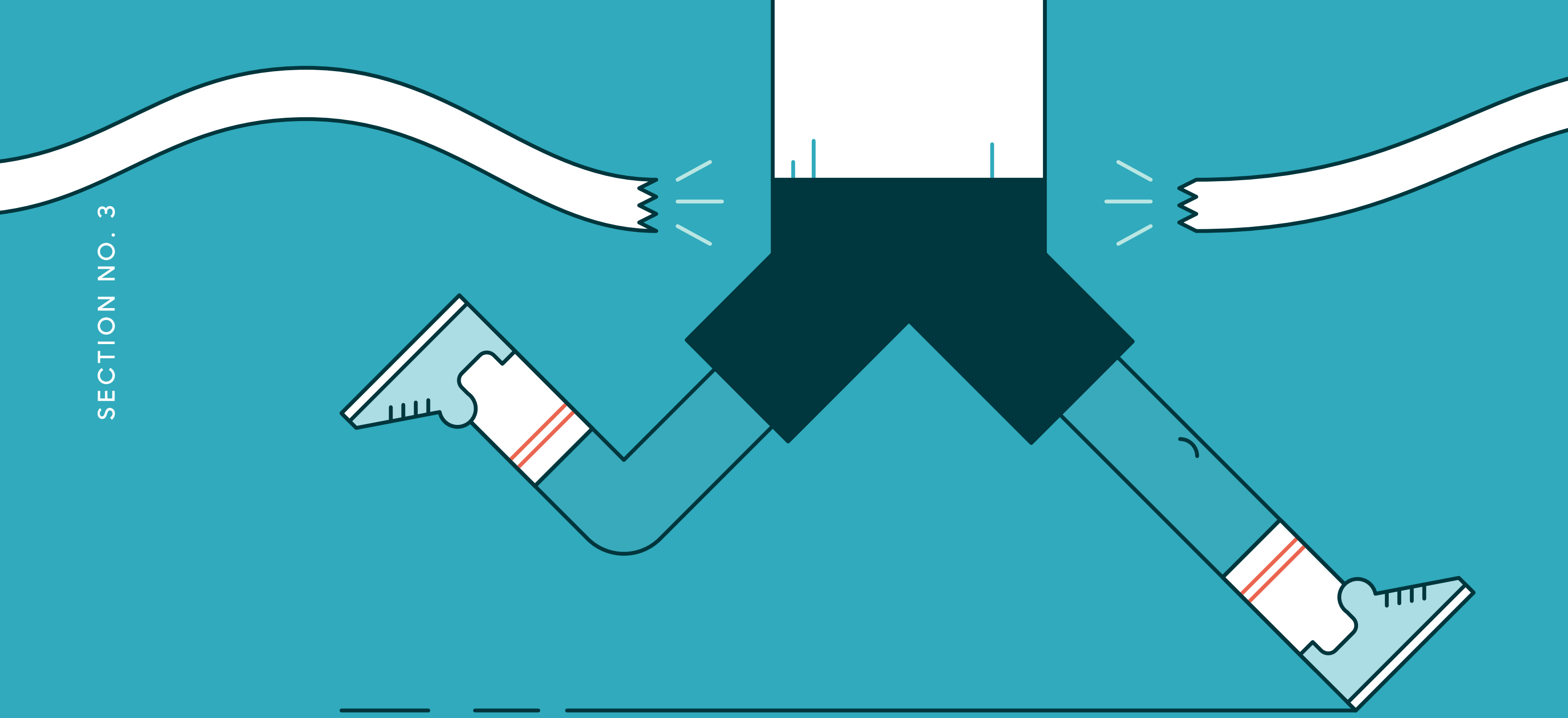


Driving efficiency

As a support organization looking for efficiency, you have a unique set of challenges and opportunities. Your organization has effectively overcome the challenges that typically plague less mature support organizations. You have a robust team with specialized roles that provides high-quality support.

Even though you are experiencing great success, you can't shake the nagging feeling that things could be much better. Maybe support provided from a newly opened international office isn't performing as well as you'd like, or change management still feels like it did during the startup days. As your support structure and strategies currently stand, you know you can't rest on past successes; instead, you must find a way to improve even further.

It's a difficult challenge, but not impossible. Zendesk has compiled real-world support strategies that have helped companies just like yours, with everything from providing multi-product support to using data to forecast different support scenarios.

This guide was designed with the support team looking to drive efficiency, and it's here to help you take customer service to the next level.

Multi-product support

Transitioning from a single-product to a multi-product company can be daunting for a customer support organization. The increasing complexity associated with supporting more products will certainly will be a challenge, but it’s not an unsolvable one, if you take the time to set yourself up for success.

Divide the work into three sections, and focus on enacting best practices for each:

1

Specialized agents

2

Knowledge-centered support

3

Reporting

SPECIALIZED AGENTS

Providing multi-product support means you likely will need to move away from solely relying on generalist agents and start employing specialists: agents with a particular area of expertise who are empowered to solve tough issues within their focus.

Best practices

- Use a combination of single- and multi-skilled staff.
- Ensure strong workforce management processes are in place.
- Use multi-skilling as a path for career progression. Agents begin as generalists and become more specialized as they progress. Let the agents define the skill-sets they want to take.
- Build clear escalation paths for tickets.

KNOWLEDGE-CENTERED SUPPORT (KCS)

KCS treats knowledge as a primary organizing principle for providing great support—something that evolves and improves over time. Since you are now providing support for new products, KCS is essential for giving agents the information they need to solve issues and giving customers access to self-service options. As your multi-product support matures, you will be able to use what you learn to further refine and improve your KCS. This way, you're always getting a little better.

Best practices

- Write clear how-to documentation.
- Provide scripted or guided customer interactions and troubleshooting so agents can consistently provide great support.
- Ensure knowledge is consumable by everyone at the company (including agents), as well as by customers, if being used for service.

REPORTING

Since you are embarking on a new venture, measuring everything with detailed reporting is imperative. This will allow you to make data-based decisions on how to improve everything from agent performance to the customer experience.

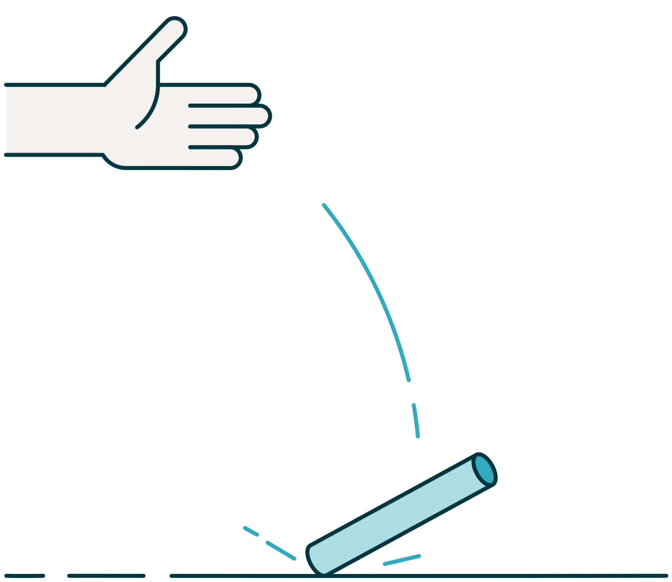
Best practices

- Create easy-to-read dashboards with details about the most important data. Give access to all stakeholders.
- Strategize around customer segmentation, so you can slice the data by specific types of customers. You might be providing relatively quick support to all customers, but you'll want to know if you're providing even quicker support to your VIPs.
- Slice by agent segmentation, too, since you are now employing specialized agents.
- Take on the perspective of the customer with customer journey reporting. Measure every interaction and touchpoint so you can see where things might be going wrong.

Change management process

Change can happen for all sorts of reasons, such as migrating to new technologies or rolling out organizational adjustments. When not handled properly, it can lead to all kinds of disruptions that can slow down productivity and eat away at resources.

Change management refers to the process, tools, and techniques used to manage the human side of change to achieve the required/desired business outcome. Change management incorporates the organizational tools that can be utilized to help individuals make successful personal transitions, resulting in the adoption and realization of change.



PREPARE FOR CHANGE

Before you get started, take the time to answer the important questions:

- [ ] **Where are we today?**
  Determine the current state of your organization and what you already have at your disposal.
  - What's our communication platform?
  - Do we have buy-in on the changes?
  - What is the escalation process?
  - What's the likely impact of change on certain teams and individuals?

- [ ] **Where do we want to be 6 or 12 months from now?**
  Next, take a look at the near-future.
  - Will agents be responsible for more activity? If so, how can you train them?

- [ ] **Finally, creating a road map of change.**
  - Can change lead to stress? If so, how can that be mitigated?
  - What's the likely impact of stress on agents?

INVOLVE THE RIGHT PEOPLE

Ensure that all stakeholders and participants are aware of everything, particularly their roles.

Can we get buy-in from 50% of the organization to drive large-scale change?

- [ ] Consider using pilot groups as a low-risk way of providing proof of concept.
- [ ] Use department-wide change agents to make sure each department is represented in the process.

How do we engage a formalized network to take on the change initiatives?

- [ ] Provide weekly communications that include updates and next steps.
- [ ] Use a dedicated project room, ensuring stakeholders always have a place to meet. Offer "lunch and learn" meetings, where you can make presentations about the change and answer questions in real time.

How do current hierarchical and silo-based structures help or hurt communication and engagement?

- [ ] Use this as an opportunity to break traditional barriers and get the company working as a cohesive unit.
- [ ] Challenge cultural norms, if they're acting as roadblocks to successful change management.
- [ ] Engage all areas of the business with regular communication.

Celebrate

Successful change management depends on many people putting in a lot of hard work.

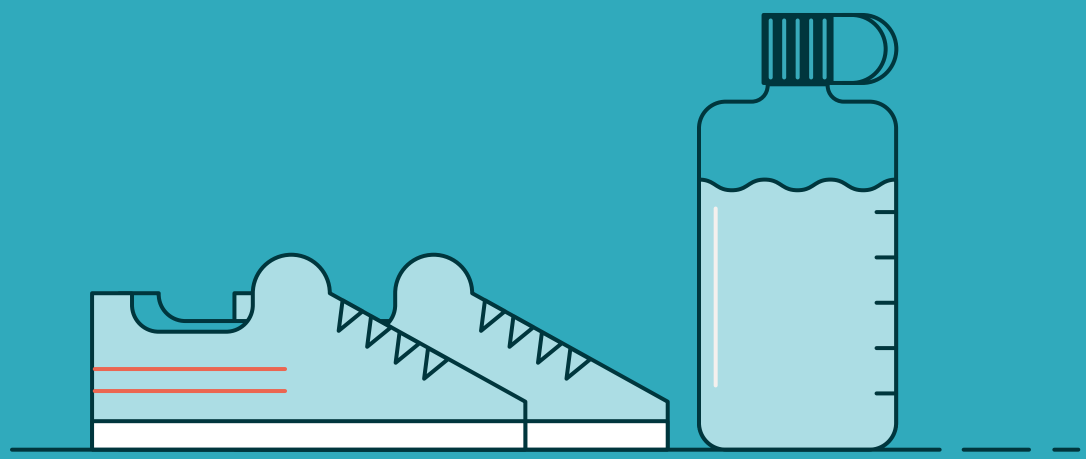
Don't forget to celebrate the launch of your new initiative, as well as long-and short-term wins.

Wins are molecules of results. They must be collected, categorized, and communicated early and often to track progress and energize your team to drive change.

Key takeaways

1 Providing multi-product support can be challenging, but properly training specialized agents, providing customer self-service options, and conducting robust reporting can help you work through the complexity, increase efficiency, and ensure you are always providing high-quality support for all products.

2 Major changes, such as organizational structure overhauls, new product releases, or new technology adoption can have a negative impact on productivity and employee happiness. Proper preparation and ongoing change maintenance can mitigate this and help ensure that it’s a huge success.



Conclusion

The process of improving customer service never ends, so this guide is meant to be a big step in the right direction. Even if you implement and master every tip and strategy, improve customer satisfaction and loyalty, and hire and train the best possible agents, there's always plenty of room for improvement.

We hope this guide has helped you understand that, although it's work-intensive, great customer service *is* possible.

Assess your Customer Service organization's maturity at assessment.zendesk.com