

Customizing Zendesk Insights

BEST PRACTICES FOR MEASURING EFFICIENCY AND SCALE,
AND QUANTIFYING THE BUSINESS IMPACT OF CUSTOMER SERVICE



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Insights is Zendesk's analytics, dashboarding, and data visualization feature, included with all Plus, Enterprise and Enterprise Elite accounts. Insights allows any organization to quickly measure the effectiveness of their customer support, benchmark themselves against industry peers, and better understand their customers.

Insights helps organizations:

- **Know what's happening:** Insights takes every interaction that occurs between an organization and its customers in Zendesk, and turns it into data that can be used to measure and improve customer experiences. Managers can use information in the new pre-built dashboards, like agent performance, to make hiring and staffing decisions.
- **Gain greater context:** Insights captures context through custom fields on tickets, users, and organizations. With context, organizations can drill down into specific segments of customers and find out the number of negative reviews they received from their biggest-spending customers.
- **Drive change:** With Insights, support teams can raise the profile of customer service within their organization by knowing where to focus. Support teams can use information from Insights to work with other teams or business units to ensure that input from customers is included in new products or services.

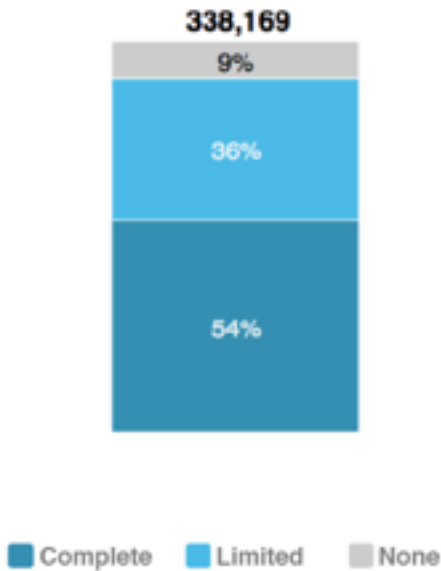
The pre-built best practice dashboards enable organizations to measure agent performance or agents, teams, and service organization. Insights gives you tools to drill into each interaction, follow up with customers, agents, and managers, and automate the sharing of insights with the rest of your company through a single, easy to access interface.

But the pre-built dashboards are just the beginning.

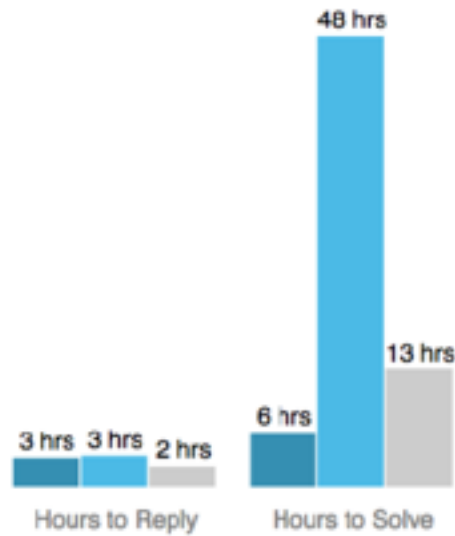
In this paper, we've created a series of reports to show you how a fictitious company Obscura customized Insights to dive deeper into their customer service data. The first half of the paper digs deeper into their customer service operations—using more context to understand support volumes and ticket lifecycle, perform root cause analysis, and score-card agent & group performance. The second half dives into how Obscura uses Zendesk for much more than just ticketing; and how Insights helps them measure the business impact of engagement, track voice of the customer and measure proactive engagement.

Support metrics by service plan type

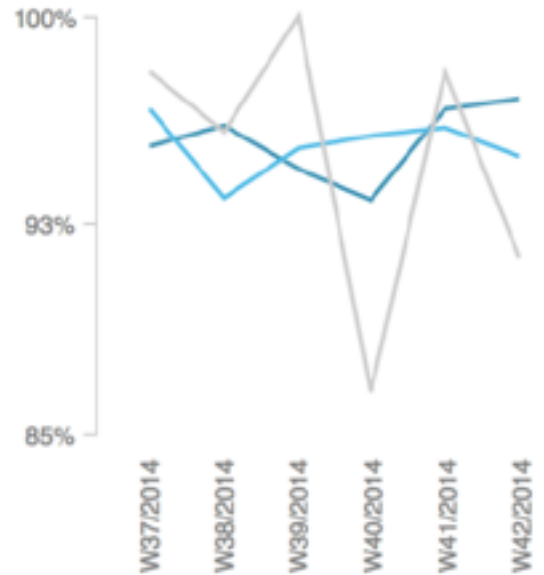
Ticket volume by plan



Median support times by plan



Satisfaction by plan



Put your data to work

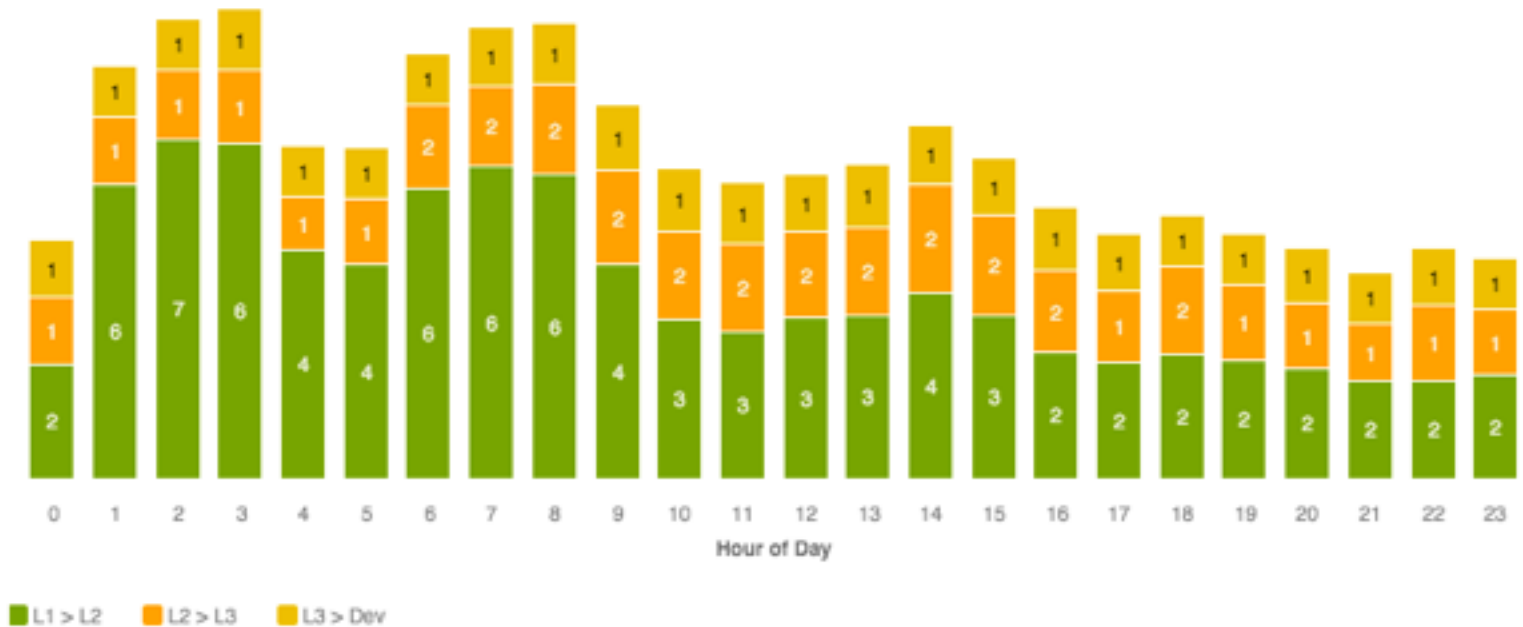
ADD MEANING TO YOUR
REPORTS BY SHOWING SUPPORT
METRICS IN LIGHT OF CUSTOMER
DATA

No longer will support data live apart from business metrics. Insights represents the union of information about your customers, their experience with your product, and the outcomes for your company. Now you can report on key relationship metrics—like customer satisfaction—for any segment defined in your user data. It's not just good for support: these are the kinds of insights anybody in the company can enjoy. By adding a little customer context to your support data, it's easy to see what's working, what's not, and what you can do better.

Let's break down some bread-and-butter support metrics across our customer segments. Adding the customer's warranty plan type to a custom user field lets us easily pull that variable into a report. Now we can easily see the massive ticket volume generated by customers with no warranty coverage, make sure our response times for complete coverage customers are within our service level agreement, and identify the segments contributing to last month's dip in customer satisfaction.

Ticket escalations

Average ticket escalations by hour



Optimize every step of support

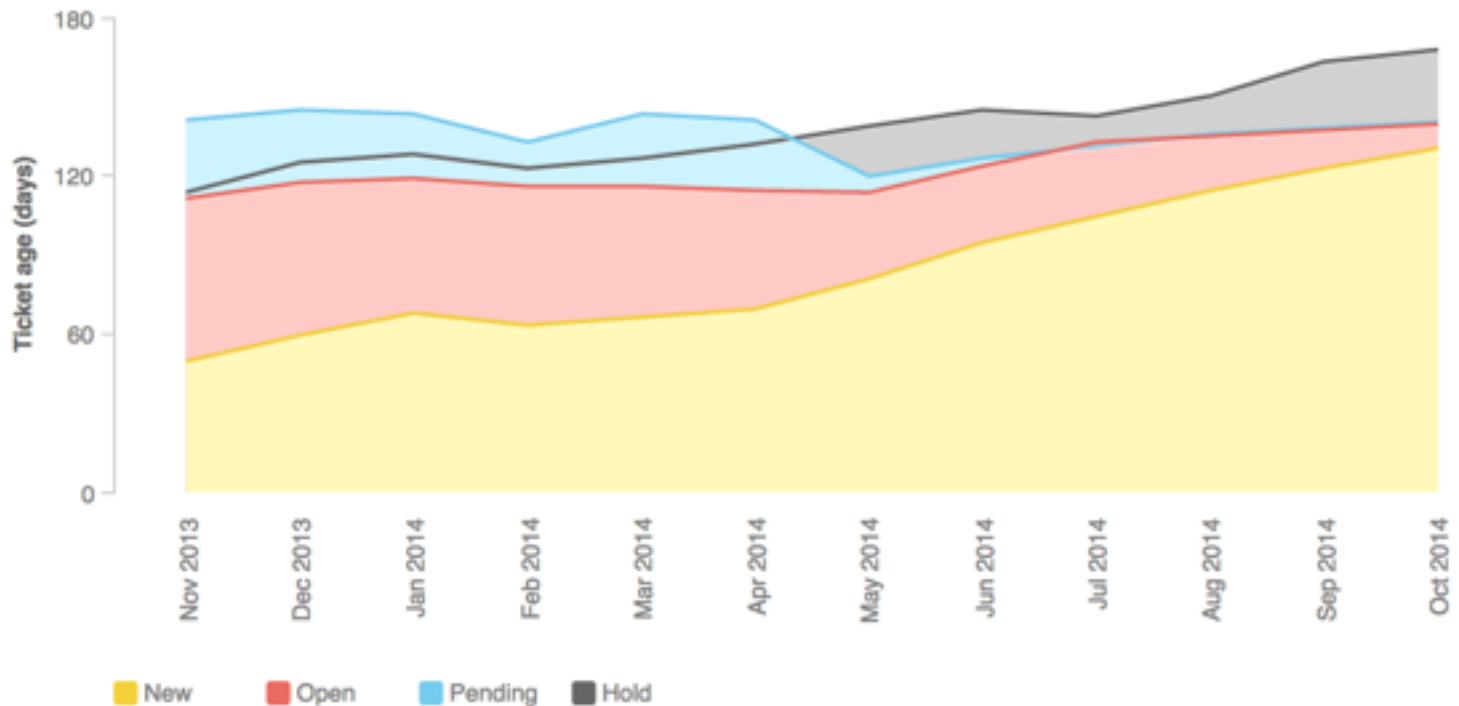
REPORT ON ANY TICKET TOUCH
YOU DEFINE, DOWN TO THE
MINUTE

An agent's work is measured in touches: ticket updates that advance the customer's issue through the ticket lifecycle. But the way that tickets are triaged, tagged, escalated and resolved varies from one company to the next. How well is your escalation process working? Insights has you covered. Any ticket update you define can be tracked, down to the hour, and you can calculate the time between two steps in a process down to the minute. You can stop guessing whether process changes have an impact on your overall efficiency, and start showing measurable results.

Here's a report showing the average ticket escalations by hour. Each type of escalation (Level 1 to 2, Level 2 to 3, and Level 3 to Developers) is defined using a custom query that builds on the group names in the Zendesk. Once you define the three escalation types, it's a snap to slice them by the hour they occurred. The early morning spikes in Level 3 to Developer escalations make it clear that our early morning Level 3 agents need more training to handle the tickets in their queue—or our late night triage agent needs some help assigning tickets.

Backlog ticket aging report

Average age of backlog tickets



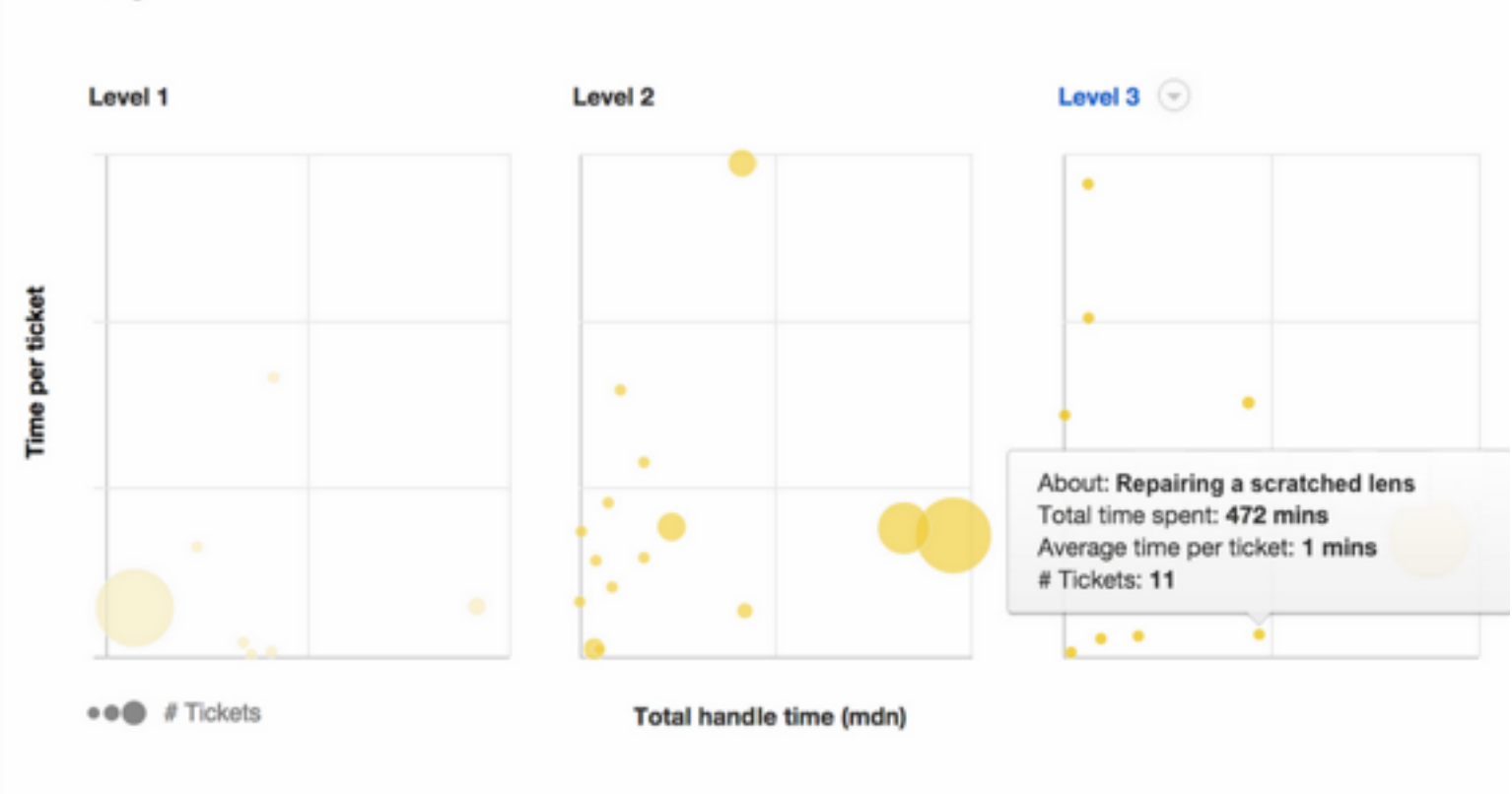
See your workload with foresight

STRATEGICALLY PLAN FOR THE
WORK TO BE DONE WITH
HISTORICAL BACKLOG DATA

The ticket backlog represents known work to be done. Insights includes a daily snapshot of your backlog: the number of tickets, their age, where they lie in the ticket lifecycle, and the agents and groups responsible for them. Tactically, segmenting your ticket backlog by age, status, and team is crucial to identifying tickets that are at risk of lowering your support performance with long response times or poor satisfaction. Strategically, seeing the change in your backlog over time can help you plan for the future.

Examine the trend in ticket age by status to quickly find problem areas in your support workflow that could use more process improvement. Unless the average age of new tickets is trending down, inquiries are taking longer to be assigned to an agent. Increasing age of open tickets may indicate slower agent performance, or more complicated requests: more analysis is needed to be sure. If pending tickets are aging more slowly, you are putting the burden on your customers to follow up: reach out to them proactively to make sure the answer they've received is helpful.

Issue by handle time



Trace costs to their root cause

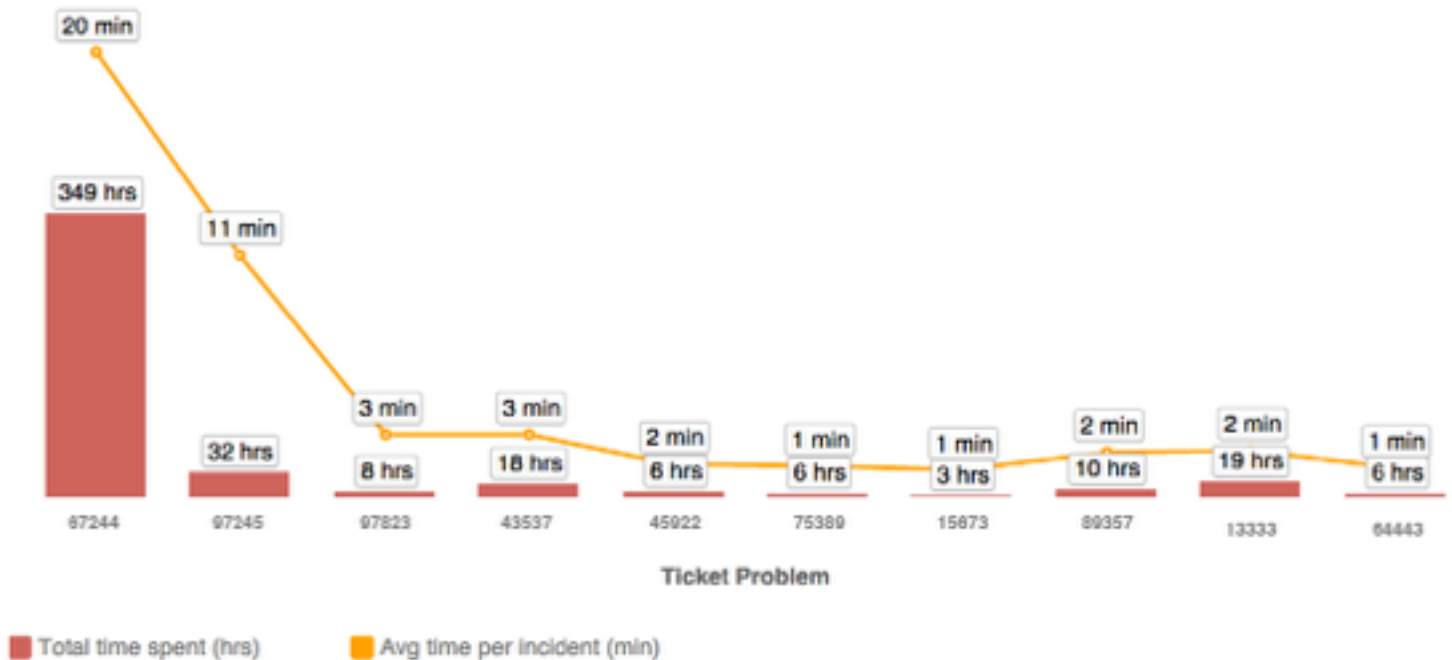
VISUALIZE TICKET DATA IN
MULTIPLE DIMENSIONS TO
PINPOINT EXPENSIVE ISSUES

A picture's worth a thousand words. When a picture of ticket data identifies where time can be saved, it could be worth (at least) a thousand dollars. Make pictures that tell a bigger story by combining several reports in a single dashboard. Seeing several types of ticket data at once (like issue type, group, and time spent troubleshooting) allows you to quickly spot where the most expensive tickets are clustering, determine what they have in common, and take action to mitigate the amount of time your agents spend handling them—whether that's more documentation, better training, or improved product design.

This example shows ticket data in five dimensions: group, issue type, average time per ticket, total time per issue type, and number of tickets. Four dimensions are captured in each bubble chart. By adding three bubble charts to a single dashboard for the Level 1, 2, and 3 groups, we create the fifth dimension. The size of each bubble quickly indicates the issue types that generate the most tickets. The further right a bubble is on the x-axis, the more time has been dedicated to that issue. The large dots in the bottom right of the Level 2 chart have a low average time per ticket. Most likely, the medium bubble near the top of the Level 2 chart is a greater concern because of the high average time time per ticket.

Problem & incident analysis

Most time-consuming problems



Compare the scale of problems

REPORT ON PROBLEM-INCIDENT RELATIONSHIPS TO IDENTIFY THE MOST URGENT BUGS

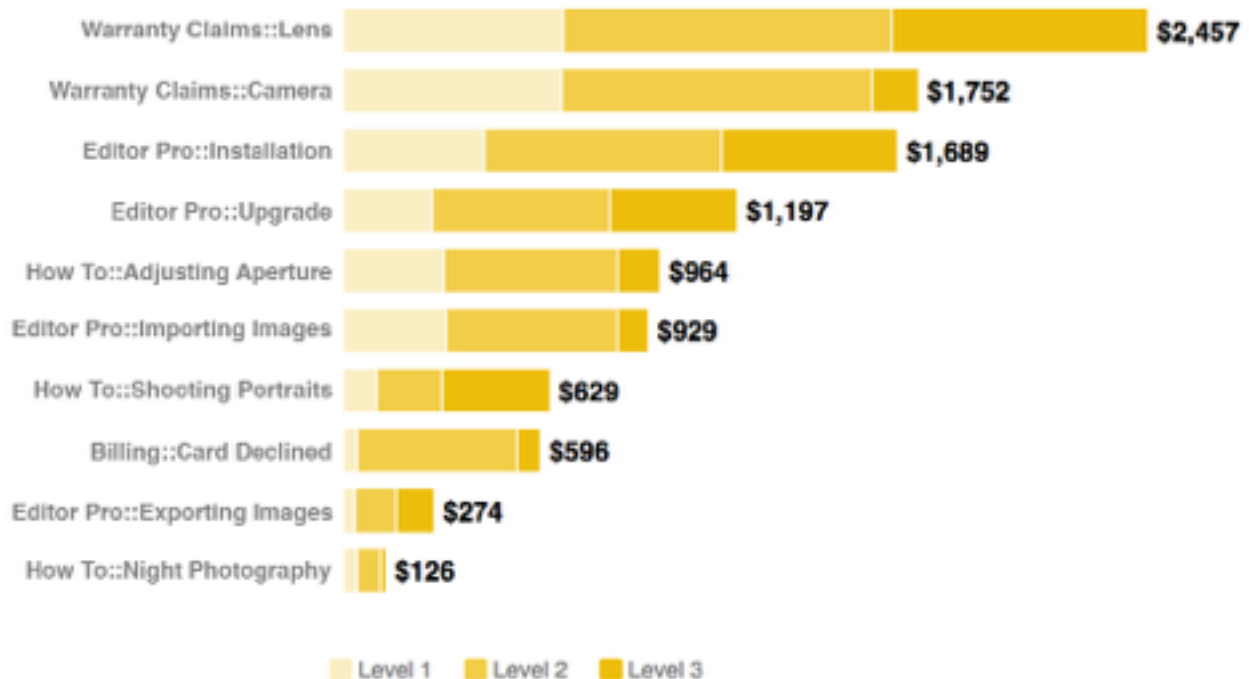
Problems with your product are pervasive: they impact the experience for many (or all) of your customers, and usually require developer resources to fix. How do you know which bugs have the biggest negative impact on customer experience, and need your valuable design and engineering resources devoted to them first?

Insights lets you report on each problem by the number of customers impacted and the time expended—by the average customer, and by your entire team. Add clarity to product roadmap discussions by demonstrating which issues have the most serious consequences for costs downstream.

This report overlays two types of data about problems: their total cost and average cost per customer. The red bars show the number of working hours expended on a problem to date. The yellow line shows the average working hours expended per incident. Not only is it easy to see the costliest problem to date is #67244; we can also see that individual instances of problem #97245 are expensive to deal with when they occur.

Support cost drivers

Cost per issue



Measure the cost to support features

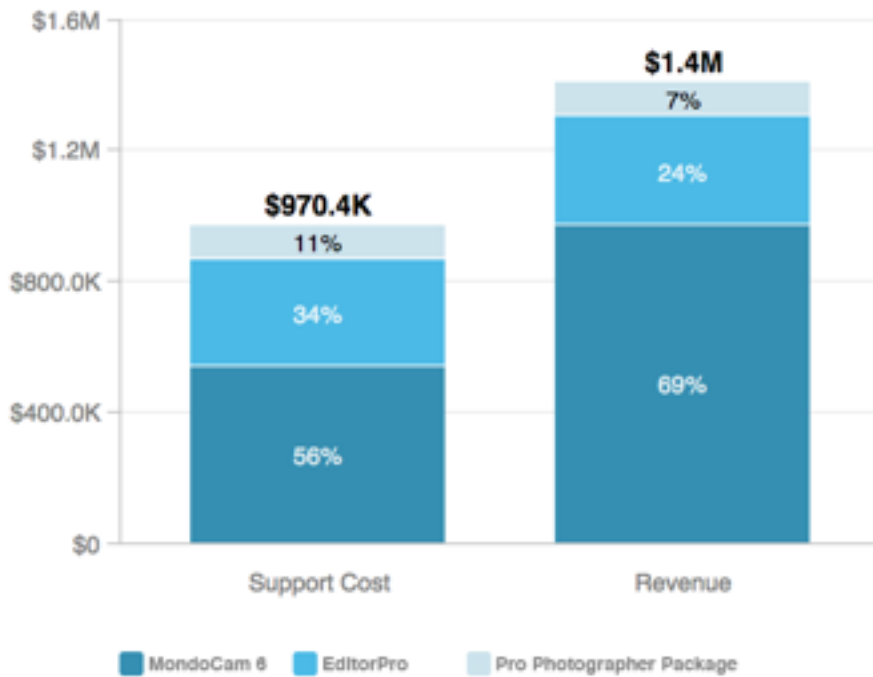
RANK EACH FEATURE BY THE DOLLAR AMOUNT IT TAKES TO SUPPORT THEM

Is the cost to support a product worth the revenue it brings in? With a little elbow grease, this question is simple to answer. Insights' custom metric editor makes it a snap to convert hours worked into dollars spent. That's a number everybody can sympathize with. A breakdown of issue type by cost to support is instant feedback for folks in Product, Sales, and Marketing, who can take action earlier in the customer lifecycle with better design, training, and documentation that reduce support requests down the line.

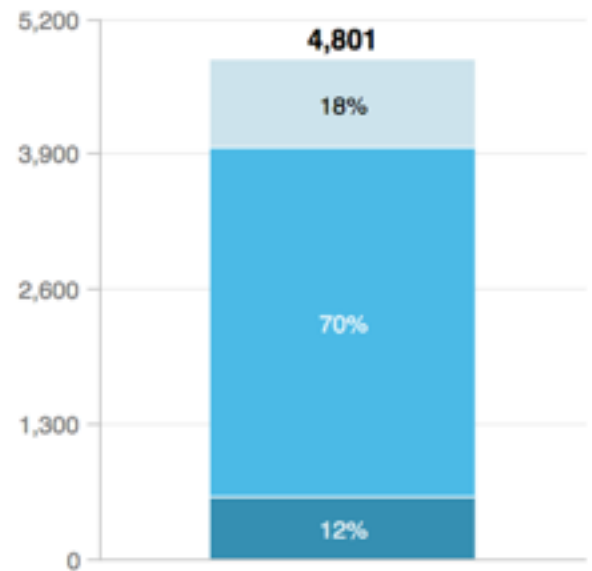
If you use the Time Tracking App to capture the time spent on each ticket update, you can multiply the hours worked by a support agent's hourly rate. This report adds the dollars spent on Level 1, Level 2, and Level 3 support agents and slices the total by issue type. It's clear from looking at this chart that we must explore more efficient ways to guide customers through the warranty claims process.

Revenue and support cost by customer type

Cost & Revenue by Products Owned



Customers by Products Owned



Customer segment analysis

GAIN A BIRD'S EYE VIEW OF EACH SEGMENT'S CONTRIBUTIONS TO THE BOTTOM LINE

Let's think bigger: we've shown how groups, tickets, and products contribute to the business bottom line. What about customer segments? When you track customer spend in Zendesk, you can easily create reports about the profit margin per customer segment in Insights. You can even schedule these high-level summaries to be sent out automatically to your management team before a strategic meeting. Storing your customer relationship data in a single place lets you create simple yet hard-hitting reports that show the real value of each customer segment to your bottom line.

Segment your customers by the products they own to determine which product lines are the most and least profitable. Obscura customers can purchase the MondoCam 6 with the Editor Pro software in the Pro Photographer Package, or they can buy the camera and software individually. When a customer registers their product online, an integration updates a custom field in their Zendesk user profile. We've leveled up our support data to analyze trends in the entire customer base. Now that we can see that our Editor Pro customers create half of our support costs but less than a third of our revenue, we know we must take steps to bring the cost and revenue of that segment into proportion.

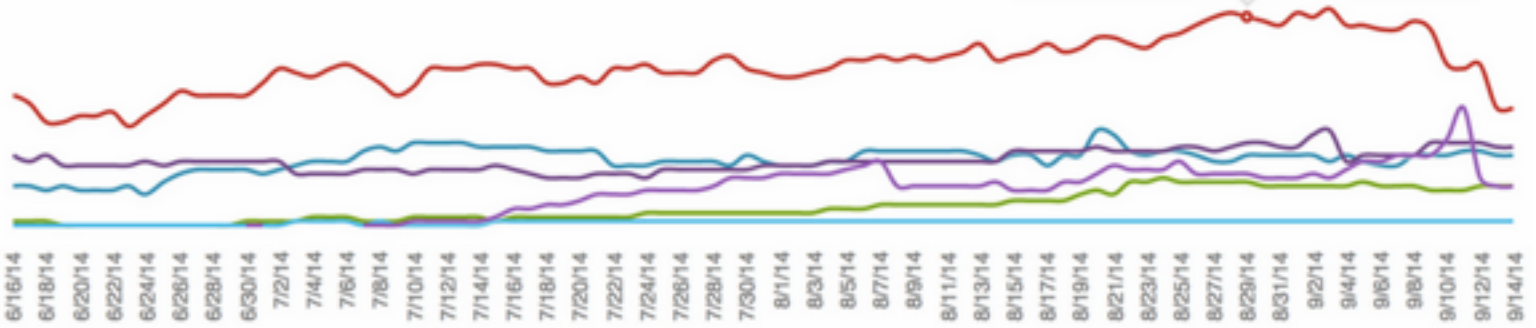
Developer backlog

30 day backlog history

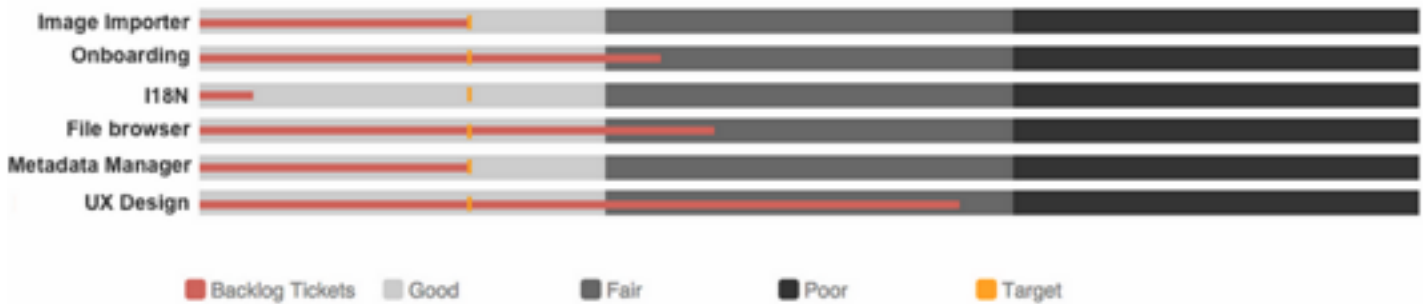
Backlog Group: UX Design

Backlog Tickets: 49

Date (Event): 8/29/14



Backlog size targets



Manage resources across teams

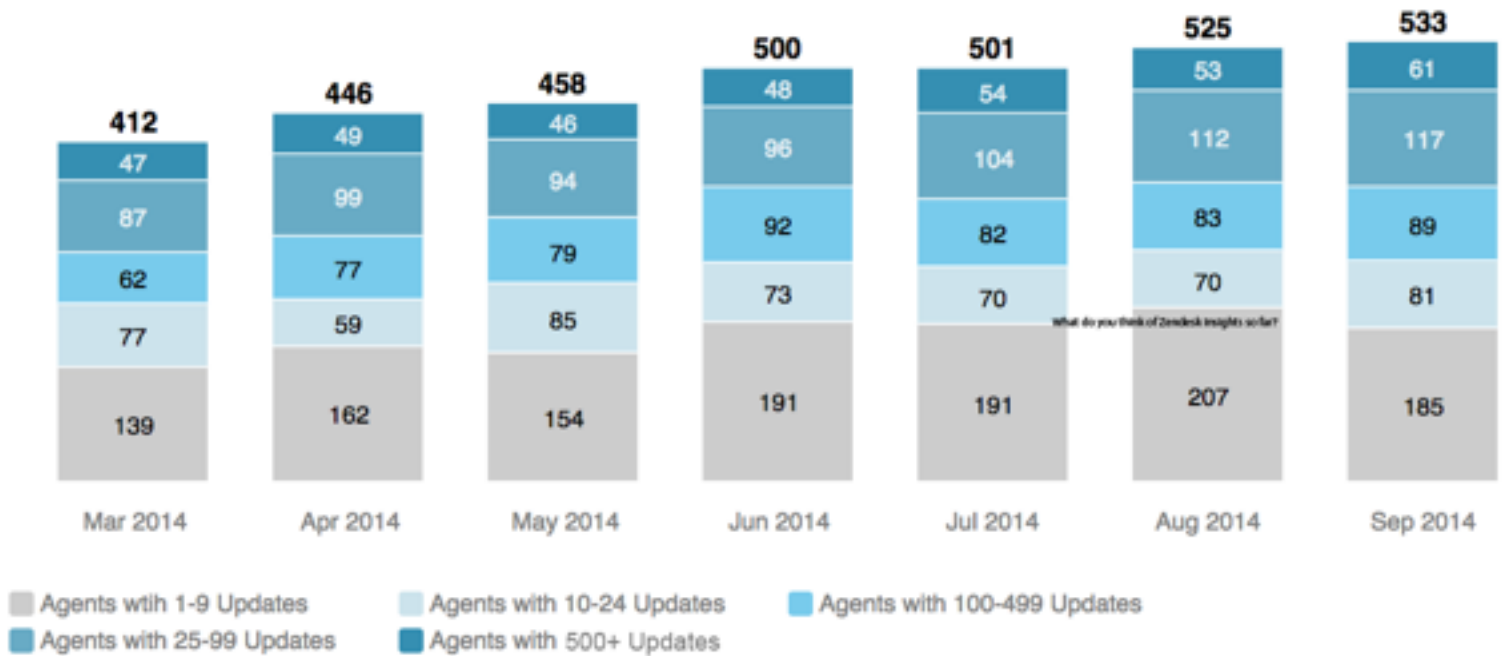
KEEP TRACK OF DEVELOPER
TEAM BUG QUEUES AND SET
BACKLOG GOALS

You know how important it is to allocate customer support resources based on the size of the support ticket queue. Why should product development resources be any different? Smart organizations use support transaction data as feedback to their product development process by fixing problems and including features that their customers say are most important. When your engineering team uses Zendesk to manage feature requests, you can manage developer and support resources from the same place. It's a great way to keep track of your feedback and improvement processes from a single dashboard, as well as monitor the success of new features.

The first report on this dashboard displays a 30 day trend line of the backlog size for each developer group. Even in a large engineering organization, you can easily see which team queues are growing too large, and at what rate. The daily trend also allows us to see that our UX bug smashing sprint in September was effective. The second report displays bullet charts for each group. Bullet charts are designed to track progress toward a goal: we like it when our backlog size, represented in red, is at or below our target of 10 tickets, represented in orange. It's typical for the backlog size to trespass into the gray "fair" territory. Fortunately, none of our teams are in the black.

Agent activity levels

Agents by # Ticket Updates



Agent seats that count for more

SEGMENT AGENTS BY ACTIVITY LEVELS TO MAKE SURE LICENSES GO TO USERS WHO NEED THEM

When your customer base grows rapidly, so does the demand for customer support. When the queue grows, we feel the impulse to hire more people. But it's not smart to simply add resources: we should manage them so that our team is as effective as they can be at the lowest possible cost. Measuring how agent activity is distributed across your agent seat licenses is an excellent way to make sure you are not simply adding seats, but manpower.

One method for looking at this distribution is to split your agents into cohorts based on different activity levels. In this report, we have created custom metrics that count the number of agents that performed n ticket updates within the last 30 days. When we examine how the size of these cohorts change from month to month, we can see how much our scaling strategy is creating efficiency, and how much it is merely adding more seats. In this scenario, we have 212 agent seats that belong to users who perform less than ten updates per month. We can create efficiency by transitioning light-touch users from full agents to free, Light Agents, distribute some of the 212 seats to higher productivity full-access agents, and shed the ones we do not need.

Agent performance

| Ticket Assignee | Performance Score | Hours Worked | Solved Tickets | Reply Time [MDN] | Solve Time [MDN] | % Satisfied |
|------------------|-------------------|--------------|----------------|------------------|------------------|-------------|
| Douglas Reynholm | 2 | 0.22 | 619 | 50.7 hrs | 434.8 hrs | 100% |
| Jen Barber | 4 | 6.97 | 469 | 0.4 hrs | 2.5 hrs | 96% |
| Maurice Moss | 5 | 29.12 | 486 | 0.3 hrs | 0.3 hrs | 91% |
| Roy Trenneman | 4 | 150.72 | 518 | 4.6 hrs | 0.0 hrs | 96% |
| Richmond Avenal | 1 | 8.62 | 739 | 5.4 hrs | 5,109.5 hrs | 75% |

| Agent | Solved (Email) | Solved (Chat) | Solved (Voice) | Ticket Touches | Reassigns | Public Comments |
|------------------|----------------|---------------|----------------|----------------|-----------|-----------------|
| Douglas Reynholm | 488 | 33 | - | 9,263 | 3,841 | 2,722 |
| Jen Barber | 520 | 4 | 5 | 4,347 | 1,849 | 2,900 |
| Maurice Moss | 143 | 1 | - | 3,498 | 1,020 | 2,745 |
| Roy Trenneman | 277 | 2 | 30 | 2,418 | 867 | 2,720 |
| Richmond Avenal | 421 | 19 | - | 9,414 | 3,321 | 5,917 |

Measure agent performance

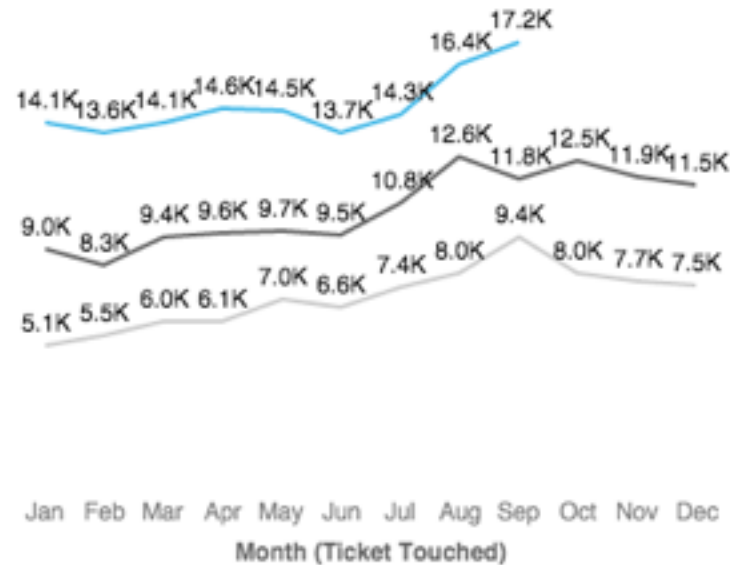
RANK YOUR AGENTS USING CUSTOMIZED PERFORMANCE METRICS

It's hard to overstate the importance of measuring agent performance. A good agent scorecard will reveal the strengths, weaknesses, and skills of each individual on your support team in a way that can be sorted, ranked, and searched. But performance is notoriously difficult to measure: it requires us to evaluate several measures simultaneously, while accounting for confounding variables like the agent's backlog size and tenure. There is no single formula to produce an infallible agent performance score: the task of choosing how to define and measure performance is left in the hands of each individual company. Fortunately, the range of agent activity data included with Insights combined with the ability to create completely custom metrics means you can create almost any agent rating system you can design.

In this example, a custom metric Score adds up points for each agent: they are assigned one point each for solving a certain number of tickets per hour worked, keeping their median reply time low, their satisfaction high, and so on, for a total of 10 possible points. Conditional formatting has been added to easily reveal the top performers. Other agent activity statistics appear on the bottom to add context.

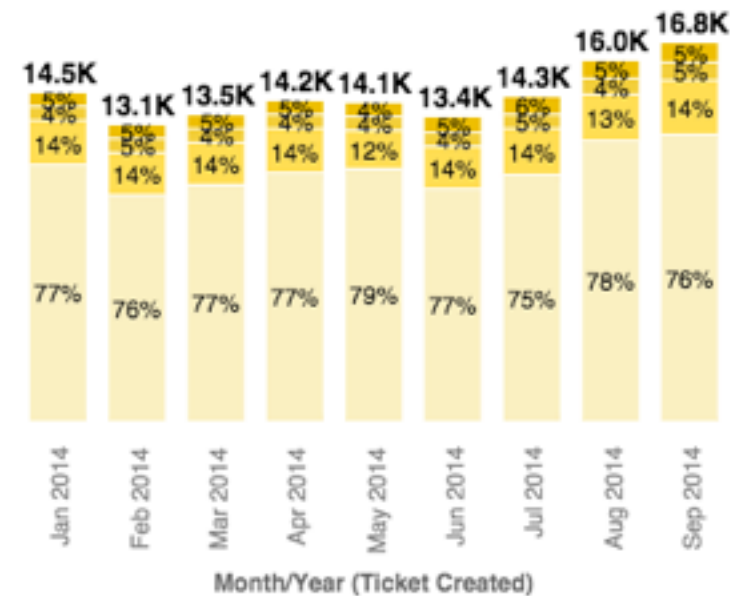
Customer engagement with support

Engaged Customers by Month



■ 2012 ■ 2013 ■ 2014

% Engaged Customers by # Tickets



■ 1 Ticket ■ 2 Tickets ■ 3 Tickets ■ 4+ Tickets

Demonstrate impact

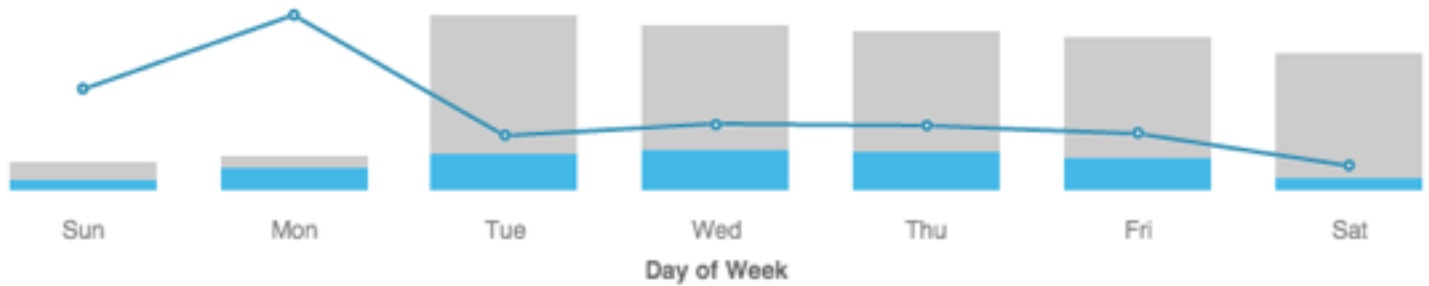
SEE THE REACH OF YOUR TEAM'S
ENGAGEMENT WITH YOUR
ENTIRE CUSTOMER BASE

A customer's relationship with support can comprise a huge part of their relationship with a business. Customers turn to support when they reach a dilemma, and the success or failure of the following transaction can determine whether they love or hate our product, would buy from us again, or would refer us to somebody else. But while some customers repeatedly contact support, others never reach out to us at all. Insights can be used to create simple yet impactful pictures of the expanding reach of your support team over time.

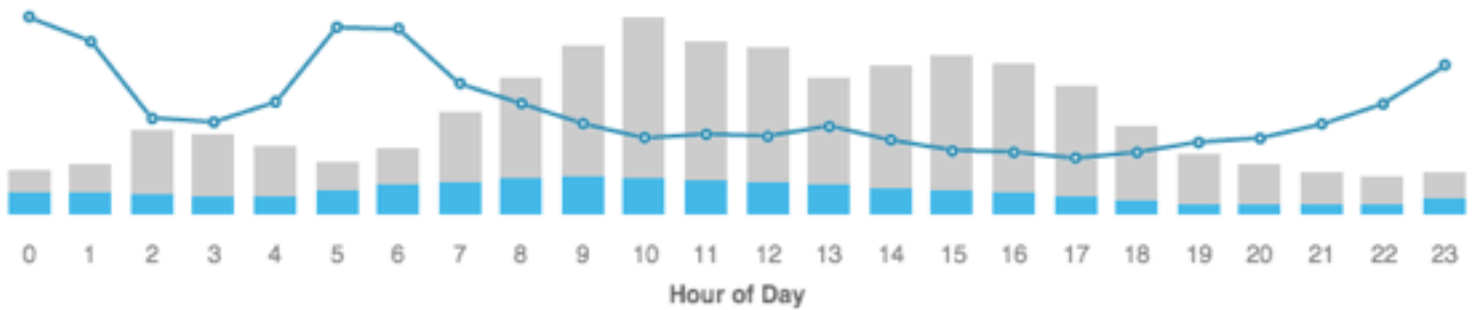
Here are two reports that show the size of the support relationship footprint. The one on the left shows the number of customers with at least one support interaction (a ticket touch) by month, year over year. Not only can we see the incredible volume of fifteen thousand customers impacted in August 2014 alone, we can also see the seasonality of our support relationship volume occurring in a mid-year spoke and an end-of-year drop. The second report provides a total number of customers who submitted tickets, and segments them by the number of tickets they submitted. This allows us to see that, on a monthly basis, about 3/4 of our customers are interacting with support transactionally, while the remaining 1/4 have repeated interactions with our team.

Satisfaction survey response rates

By day of week



By hour of day



■ Surveys sent ■ Survey responses ■ Response rate

Become a better listener

OPTIMIZE YOUR SURVEY
METHODS FOR MORE FEEDBACK
AND GREATER ACCURACY

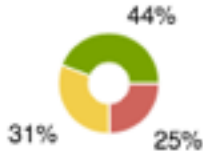
To make sure your Satisfaction Score is as unbiased as possible, you should collect survey feedback on as many support interactions as possible. But the likelihood of a customer responding to a survey varies from one person to the next. Insights provides you with survey engagement data that can be used to determine optimal send dates and times for surveys. Even better: when you change your process for collecting feedback, Insights will help you demonstrate the results.

These reports use the Event dimensions Day of Week and Hour of Day to plot three variables over time: the number of surveys sent, the number responded to, and the ratio of responded-to-sent. The actual numbers here are less important than what the data is showing us: even though the majority of our surveys are sent out on Tuesday through Saturday, the highest response rate is on Monday: it would benefit us to have surveys automatically sent at the beginning of the week.

Net Promoter Score™

Calculated Score

25



Weekly Trend



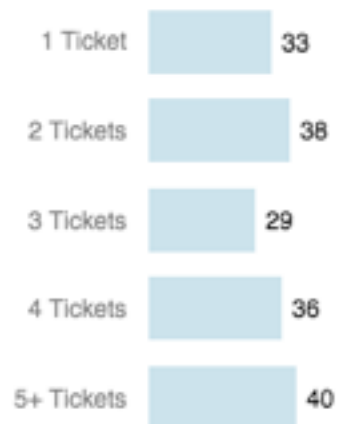
By customer tenure



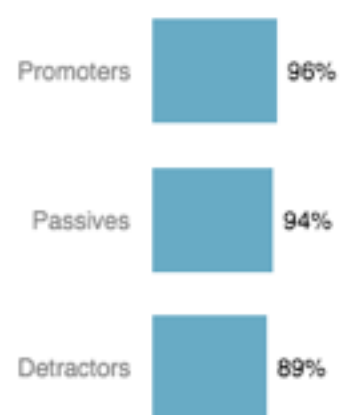
By warranty type



By support interactions



Satisfaction by NPS group



Increase customer loyalty

DISCOVER THE CUSTOMERS
THAT LOVE YOU, THE ONES THAT
DON'T, AND WHY

If you use Zendesk's Net Promoter Score survey to measure and track your customer loyalty, you'll find the data waiting to be used in Insights. Breaking down NPS scores by the segments defined in your customer data is a great way to identify which parts of your customer base will advocate for you if given the chance, as well as those who could use a little extra love. This is a straightforward method for getting teams across the company to converge on which customer segments may need attention to improve their overall user experience. Additionally, correlating a customer or segment's NPS with the quality of support they receive demonstrates the measurable effect of customer support on business longevity.

Insights allows you to build an NPS dashboard the entire organization can rely on. The calculated score is displayed, next to the proportions of promoters, detractors, and passives, and a trendline of the score over time. Beneath that, several methods of segmenting NPS have been used, showing the relationship between NPS and customer tenure, warranty type, the number of support interactions, and customer satisfaction. Our knowledge of the associations between longer-tenure customers and limited warranty customers having higher NPS is attenuated by our understanding that NPS is volatile over time.

Editor Pro Upgrade v1.5.7

Customers Contacted

16,284

Upgrades Complete

4,397 27%

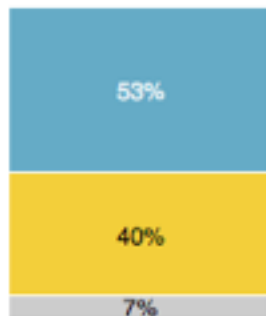
Upgrades In Progress

11,887 73%

Revenue Upgraded

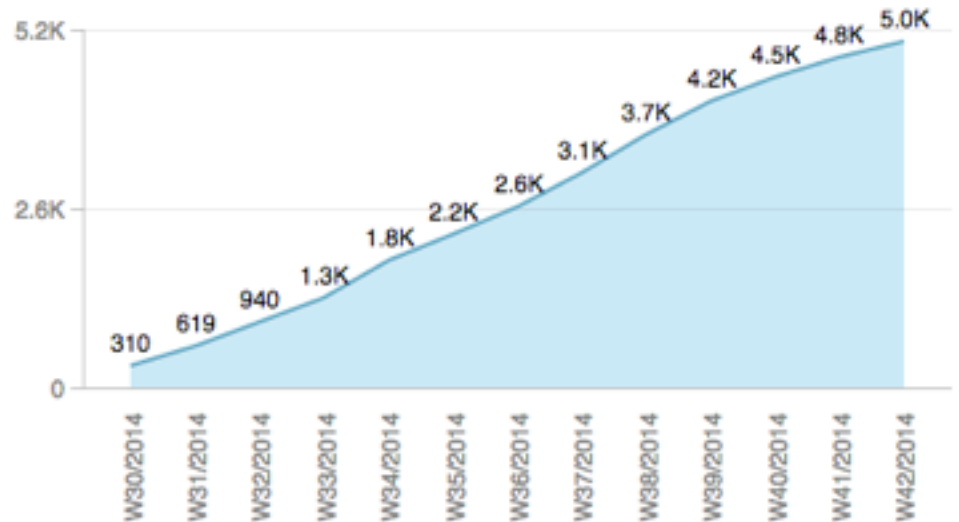
\$3.5M 25%

Customers by upgrade status



■ New ■ Open ■ Pending

Upgrade trendline



Reach customers first

MANAGE PROACTIVE
ENGAGEMENT CAMPAIGNS FOR
TICKET DEFLECTION AND
BETTER CUSTOMER
EXPERIENCES

Creating proactive tickets for a set of users in a customer list is a great way to engage customers at the beginning of a complex process to help them avoid problems. Whether you're asking them to upgrade their software version, notifying them of a delay in their purchase shipment, or simply letting them know about a change in your terms and conditions, proactive tickets can deflect tickets by preventing misunderstandings and let your customers know you're looking out for them. Because ticket, user, and relationship data is unified in Insights, it's the perfect tool for tracking proactive engagement campaigns.

Many customers resist upgrading their software, even though the most up-to-date version is also the most bug-free. To encourage customers to avail themselves of the improved user experience, Camera Obscura created this dashboard to track a proactive engagement campaign. Large headlines display the total customers contacted, as well as the proportion who completed their upgrade, the ones who are stuck in the process, and the total revenue upgraded.