

ADOPTION PATHS

EXPERT GUIDANCE & MANAGED SERVICES



BE HUMAN AT ENTERPRISE SCALE

We all share the vision of great customer engagement. But the journey to get there varies depending on the individual needs of each business. That's why we built a number of **Adoption Paths** to help you adopt Zendesk in an agile and effective way, while providing guidance on best practices and benchmarking.

These paths come from analyzing the success of over **45,000 businesses** using Zendesk, and are customized based on your company's needs and goals.

Each Adoption Path starts with a **Service Strategy Review**, led by Zendesk's Enterprise Team. During the Review, we will work with you to understand your specific business drivers and align on long-term goals. Together, we will develop short and long-term KPI targets and compare these against the Zendesk Benchmark.

These four paths were designed to make it simple for even the largest organization to get started with Zendesk in less than 30 days to directly address the most common customer service needs and areas of focus:



SCALABLE SUPPORT



EFFORTLESS SELF-SERVICE



PROACTIVE ENGAGEMENT



EMPLOYEE SERVICE



Scalable Support

Scalable Support provides a framework to help you improve the efficiency of your contact center and adapt to changing customer expectations.

This path is built around an elegant system for dealing with inbound ticket requests from any channel – email, web, social, phone, or chat. It facilitates one-on-one customer support in a way that is quick and efficient, enabling a reduction in ticket backlog and scaling across large and diverse customer bases

	Adopt	Optimize	Transform
Insights & Benchmarks	<ul style="list-style-type: none"> Define success metrics to measure success across channels Configure Insights dashboards based on business goals Define team & agent performance goals 	<ul style="list-style-type: none"> Identify training and staffing needs based on agent performance data Analyze data from first 90 days to drive optimization Refine targets based on learnings - move to focus on throughput 	<ul style="list-style-type: none"> Deploy NPS / CES measurement program to correlate scale and customer metrics Shift metrics focus to quality (e.g. FCR, internal quality, data quality)
People & Process	<ul style="list-style-type: none"> Analyze high-volume interactions for process improvements Design ticket routing and escalation processes 	<ul style="list-style-type: none"> Analyze backlog and complex business processes for efficiency opportunities Review team org and support tiers to adjust staffing levels 	<ul style="list-style-type: none"> Revisit highest volume / effort service interactions Implement workforce planning to address seasonality/ anomalies
Product & Platform	Implement: <ul style="list-style-type: none"> Help Center (Knowledge Base and Forums) CTI (reduce AHT) Forms (no free form email) Simple Triggers & Marcos Queues & Staff Configuration Out of Box Insights Reports 	Refine and Implement: <ul style="list-style-type: none"> Reactive Chat (Channel Mix) Advanced Triggers & Macros Native Apps Custom Insight Reports 	Refine and Implement: <ul style="list-style-type: none"> Proactive Chat Integration Apps & Triggers Advanced Entitlements & SLA's

Please contact us for eligibility and pricing information

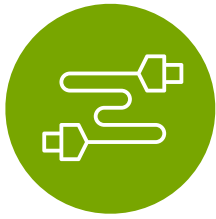


Effortless Self-Service

Effortless Self-Service is about making it easy for customers to find and discover information. Zendesk helps you track and predict their questions, and provide a seamless path to answers. This allows customers to help themselves, find what they need, and minimize their frustration.

	Adopt	Optimize	Transform
Insights & Benchmarks	<ul style="list-style-type: none">• Establish self-service benchmarks (views, users, comments, effort)• Baseline performance	<ul style="list-style-type: none">• Analyze content metrics (e.g. popular topics, deflections) for gaps/opportunities• Measure SEO uplift• Analyze assisted interactions for forum potential	<ul style="list-style-type: none">• Optimize self-service ratio by customer segment• Track & reduce cost-to-serve by segment
People & Process	<ul style="list-style-type: none">• Migrate existing content into Help Center KB• Designate knowledge manager• Define content approval process	<ul style="list-style-type: none">• Analyze high-volume service interactions for those eligible for self service• Establish content roles, editors, and workflows• Seed Forum community with moderators / cross-train agents to moderate forum	<ul style="list-style-type: none">• Enhance content admin and moderator skills through training• Define self-service to assisted-service escalation paths
Product & Platform	<ul style="list-style-type: none">• Set up Help Center with unified agent/customer KB• Implement ticket forms and deflections	<ul style="list-style-type: none">• Optimize for mobile (native & web) channels• Set up customer Forum with segmented content	<ul style="list-style-type: none">• Embed support content within product context• Enable internationalization of KB content• Implement assisted-service escalation options

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Proactive Engagement

With Proactive Engagement, the experience is less about the ticket and more about the customer. Zendesk lets you gather customer data and act on the insights they provide. This turns interactions into conversations, and creates customer relationships that are more meaningful, personal, and productive.

Insights & Benchmarks

Adopt

- Define customer segments
- Define response rate targets
- Set Customer Effort (CES), CSAT and NPS goals

Optimize

- Evaluate response rates, adjust proactive volume as necessary
- Validate channel preference

Transform

- Analyze segment LTV vs cost to serve
- Correlate CES, CSAT and NPS drivers

People & Process

- Define customer segments
- Segment customer types
- Define interaction points to offer proactive engagement

- Design segmented Voice of the Customer (VoC) survey campaigns to tie back to the customer record
- Integrate 3rd party customer data (e.g. Acxiom)
- Define marketing communication triggered by Service transactions

- Integrate VoC across channels (web, mobile, in-store, etc.)
- Turn VoC data into funded projects for improvements

Product & Platform

- Create customer lists segments - user/org fields
- Configure and deploy Zopim chat for service as well as proactive outreach

- Enhance user profiles using custom apps for external data
- Automate proactive outbound communication using macros and triggers

- Use APIs to integrate with other outbound systems
- Integrate to marketing automation system to leverage service data as part of marketing

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Employee Services

Employee Service takes the best practices we've gathered through customer service and refines them for internal use. Using Zendesk, IT, HR, Finance, etc. can communicate more simply and effectively – and without overloading their inbox or being held hostage in meeting hell. This helps employees to be more productive and engaged, and ultimately enables these departments to better support business growth.

	Adopt	Optimize	Transform
Insights & Benchmarks	<ul style="list-style-type: none">• Configure Insights dashboards based on business goals• Define helpdesk or department performance goals	<ul style="list-style-type: none">• Implement custom metrics, reports, and dashboards• Analyze content metrics (e.g. popular topics, deflections) for gaps or opportunities	<ul style="list-style-type: none">• Measure employee CSAT and Engagement tied to service levels
People & Process	<ul style="list-style-type: none">• Design ticket routing and escalation processes• Migrate existing content into Help Center KB	<ul style="list-style-type: none">• Implement helpdesk and employee training processes• Identify opportunities for increasing self-service• Build employee journey maps	<ul style="list-style-type: none">• Identify other departments or applications to be integrated
Product & Platform	<ul style="list-style-type: none">• Set up groups and views based on department• Implement business rule automation using triggers and shared macros	<ul style="list-style-type: none">• Set up user lists based on employee type and level• Set up Help Center with ticket forms and auto-suggestions	<ul style="list-style-type: none">• Add custom apps for enhanced productivity• Implement internal SLA support using automations

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