



HOW TO PROVIDE GLOBAL SUPPORT



TABLE OF CONTENTS

The Follow-the-Sun Support Model	3
Best Practices for Providing Global Support	8

THE FOLLOW-THE-SUN SUPPORT MODEL

The traditional “follow-the-sun” model is a type of global workflow in which issues can be handled by and passed between offices in different time zones to increase responsiveness and reduce delays. It was developed to provide round-the-clock customer service, literally “following” the sun around the globe.

In the early days of follow-the-sun, the approach seemed like it was only feasible for big companies because they had the resources needed to open multiple offices and hire employees around the world.

The truth is, follow-the-sun support is simply a method meant to satisfy customers—regardless of time or location. This can be achieved in a variety of ways. For some companies, it means providing anytime, anywhere, 24/7/365 support—the original definition of the follow-the-sun model. But other companies may determine that they can meet their global support needs with other tactics.

In any case, one thing is clear: To provide the highest level of customer service, your support team must decide when to be available. Yes, this could mean 24/7/365. But don’t worry. There are options at hand that will allow you to deliver anytime, anywhere service and get global, fast—regardless of the size of your company.

Start by asking some basic questions. If you're a small company looking to provide support globally, consider what steps you can take now to achieve your support goals.

This can be done by evaluating when your customers need you most, and carefully considering how to meet them where they are. You most likely won't need to open multiple offices, especially at first. On the other hand, a remote office (or maybe just a representative) in a key area, in a different time zone, might be exactly what you need.

For example, our customer [Prezi](#) has teams in two locations—one in San Francisco and one in Budapest. They meet their global support goals with these two teams working together, giving them 18 hours a day of coverage without having to staff up aggressively.

Better yet, the answer may lie in how you use technology. A cleverly deployed, cloud-based tool could provide a quick and useful way to meet your growing support needs. But before going global, take a look at your team and your customers' needs. When deciding what's best for you, consider these factors:

1 Are you a small team or a big team?

When Zendesk was smaller, we had certain practices and procedures in place to meet the demands of our customers. For example, we had some of our first customer advocates in North America, Europe, and Asia to match where our customers were. As we grew, we adjusted. A single representative became a team, then a satellite office, and so on. (Read more about

Evaluate when your customers need you most, and carefully consider how to meet them where they are.

Zendesk's approach in the next chapter: "Best Practices for Providing Global Support.")

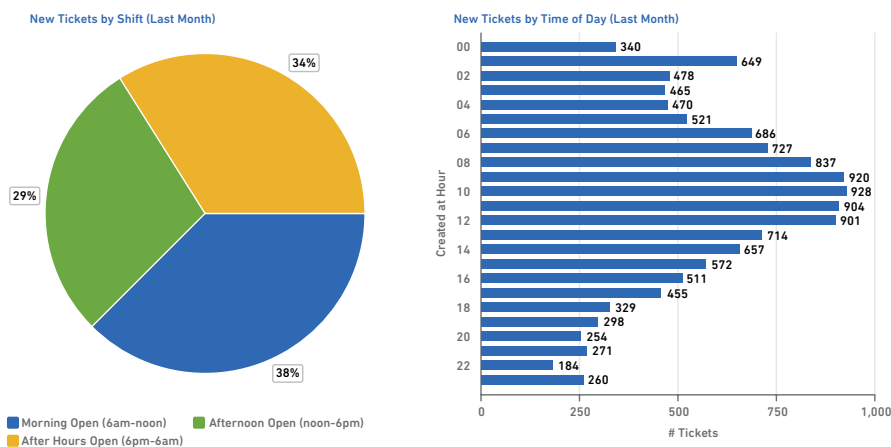
2 How complicated are your support issues?

Are the majority of your support issues simple, transactional issues like password changes and processing returns, or are they more complex technical issues requiring more resources?

3 Where are your customers?

4 When do their tickets come in?

Using Zendesk's reporting integration with [GoodData](#), it's possible to assess your ticket flow by shift and time of day. Check out the sample screenshot below:



5 Are mobile apps being used?

Better triage techniques and answering tickets with mobile might be a great answer for you, and it's available immediately.

6 Are you driving self-service?

You may not be available, or have the resources to have a team member available, but your knowledge base and forums should always be available! Optimizing self-service is an excellent way to support your customers.

As you can see, follow-the-sun is no longer just a big company concept, and it's not the only way to provide high-quality service. The model you choose, develop, and refine should be the one that works best for you and your customers. Gamers and retail customers, for example, might need 24/7/365 support. Or, maybe

The model you choose, develop, and refine should be the one that works best for you and your customers.



what they really need is support at night (or during non-business hours). So, meet them where they are. If this means establishing a team or agent in another time zone, you should consider it. In addition, staggering your shifts at your home office and within your normal time zone might satisfy your needs without having to hire a remote representative.

In other words, there are more than a few ways to provide the support your customers need. But be forewarned: If you claim to be available 24/7/365, you need to be prepared to follow through. If you're not available, or if the service you offer at certain hours is noticeably inferior, you run the risk of upsetting your customers— and losing their business.

A traditional follow-the-sun support model isn't necessary if your organization doesn't need one or will struggle to meet its demands. Perhaps there's a model that can provide the service you need without requiring the resources and structure of the original follow-the-sun concepts.

Today, once a company puts up a website, customers can come from anywhere. Therefore, companies big and small may need to get global fast. It's essential to find out not only where your customers are, but what steps to take to meet them there and provide the service they need.

BEST PRACTICES FOR PROVIDING GLOBAL SUPPORT

Today, even small and mid-sized companies can provide outstanding, round-the-clock support and get global, fast.

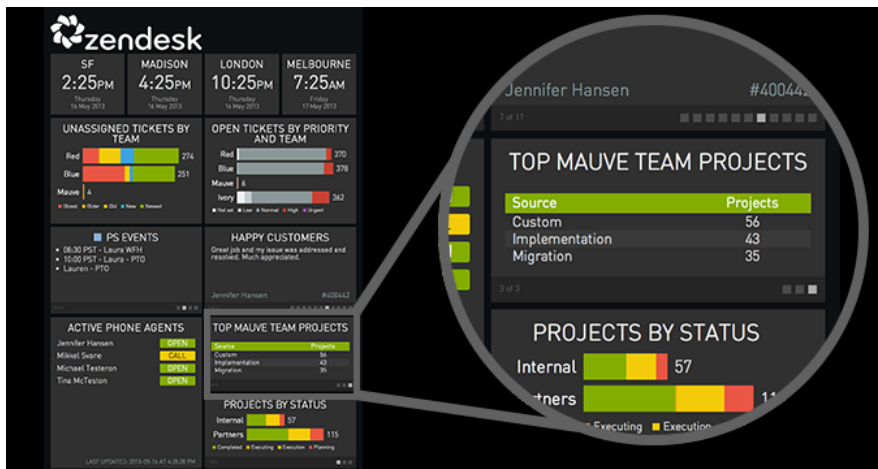
The key to great support is to base it on the needs of customers. Being available all the time is just one component of providing good service. Priority #1 is giving customers the service they need, when they need it, in a fast, simple, and clear way.

Zendesk Examples

Let's look at our own example. Today, Zendesk is a 500+ person company with customers in 140 countries. Because of our product, approach, and goals, we're able to stay a relatively small team that performs like a big team.

Below are a few of the techniques we've found effective in providing the service our customers need. These techniques factor into our approach to follow-the-sun support, but as you'll see from our customer examples (also below), every approach varies.

- **Dashboards** — Dashboards offer visibility into teams and activity everywhere, and are very effective in helping everyone stay informed. A global dashboard is a key component to understanding what a global support organization is and should be.



- **Collaboration tools** — The Zendesk support team uses [Flowdock](#) to provide a space for conversations so team members can see what's currently being talked about, as well as review previous conversations. In a sense, it's a virtual way of following the sun by finding out what has been happening while one team was working and another was sleeping. Or watching movies. Or eating burritos. Or whatever else people do when they're not working.

This collaboration tool is a must for support managers, but we try to keep everyone involved by placing all team members in the main support room in order to track conversations, live chats, and other activity. Team members in the main support room also include account managers, product managers, some of the engineering leadership, and customer success team managers from all regions.

Each team (product support, advanced support, etc.) also has its own room. This keeps chatter down in the main room, so the focus there stays on things that need to be communicated to everyone.

We have a format for posting problem tickets—using a specific tag, summary, and ticket number—making it easy to find recent problem tickets. This isn't a replacement for ticket views in Zendesk, but provides another way to see what's new, and lets everyone know a problem ticket was created. This helps ensure incident management starts immediately.

In general, using tags for the really important stuff is very helpful. We also pull in tweets from the operations team, which is another source of helpful information.

- **Daily handoffs** — The idea is to pass issues on to other teams for continued attention when one shift ends and another begins. This helps ensure that important items aren't allowed to sit unattended for long periods of time, and provides continuity across teams. This is a method practiced by many of our customers.

At Zendesk, we place a high priority on agent accountability and tracking metrics based on performance. As such, we don't use a standard daily handoff method. The reason for this is that measuring effectiveness can suffer when several agents touch a particular ticket. It can become difficult to determine who's responsible for which actions. Instead we like to maintain a single owner on each ticket. This emphasis on accountability is an example of the support goals we've set for ourselves, and what we measure to ensure we meet them.

Our emphasis on accountability is an example of the support goals we've set for ourselves, and what we measure to ensure we meet them.

However, sometimes not using a daily handoff method can result in lag times. Requiring a single owner per ticket may result in delays, especially if the owner is unavailable for some reason.

Just remember: Your approach and strategy depend on the specific goals and accountabilities you create for your team and the service level agreements you offer to your customers.

- **Communications** — Develop a robust system for communicating between HQ and regional support teams. Changes to support policies and systems must be communicated routinely and fluidly.

- **Leadership** — Employ at least one team lead in every level and location of support. This group of experienced agents helps keep everyone on the same page during the day. They make sure to touch base with the advocates on their team about urgent issues and events that are affecting the day's work. Team leads are the go-to resource for help with issues while they're occurring, especially when a manager is not available or when group action is needed immediately.

- **Training** — Provide the same experience and program for all. At Zendesk, every new employee goes to San Francisco for a week and receives the same training. In addition, an entire section of our knowledge base is set up for training resources and materials. This not only helps ensure consistency, but enables a shared experience, which can be particularly beneficial for team members who will work remotely.



- **Languages** — When working globally, correct language recognition and usage is critical. Zendesk has [dynamic content](#) to help address this. It can be used with automations, [triggers](#), and [macros](#) to assist agents everywhere in delivering support in the correct language. It works by using a unique type of Zendesk placeholder, for which you define the content that is dynamically inserted into your business rules and communications with customers. When the staff member with expertise in a particular language is not available, Zendesk recognizes the language of the customer ticket and can be configured to respond in a variety of ways. For example, a macro can be created with a comment notifying the customer of a short wait time until the requisite language speaker is available. (Pro tip: Have a native speaker review all messaging before active use. In other words, don't [guess](#) or use translation software.)

Customer Examples

Our customer and partner [Zuora](#) employs a version of a follow-the-sun structure and offers 24/7/365 support coverage. They do it by starting a team in Colorado at 8:00 a.m. (MT). In California, they have team start times of 7:00, 8:00, and 9:00 a.m. (PT). In addition, team members in the Beijing office start at 7:00 a.m., 9:00 a.m., 1:00 p.m., and 2:00 p.m. local time.

By staggering their support personnel start times across these key time zones, they are able to meet the service level agreements they've set for their customers. Zuora also employs a daily handoff model, in which open and pending matters are passed along to the next team when one goes off duty. Zuora uses private comments in Zendesk tickets to help communicate important details to team members picking up issues already in progress.

[Nitro](#) has a follow-the-sun structure that is straightforward and more traditional. They station support agents in almost every time zone, and at the end of each shift they use daily handoffs to pass open tickets to agents just starting their shifts. They assign tickets to the next agents, leave private comments if necessary, and the next shift has a complete view of the conversations and ticket details.

[Solium](#) provides an equity management platform that performs real-time trades 21 hours per day. This schedule is determined by global stock exchange hours. In creating a support structure based on this schedule, they examined the business units they needed to support and each region. They also divide their support to cater to two groups of customers: participants (e.g., employees at companies) and client administrators (e.g., HR teams administering

equity/compensation). Solium deals with equity and money transactions, so it's essential that they act fast to support their users. Therefore they position support agents based on where users are, as well as the locations of the major stock exchanges.

What to Think About

Here are a few key considerations to help you determine what's best for your support team and your customers:

- 1 What are your customer support goals and accountabilities?
- 2 What are you trying to do with your customer support? Does it have a basis in technology?
- 3 Do you have a strong understanding of what you're trying to accomplish globally, and what your overall department turnaround times should be? Think about what "follow-the-sun" means to you, and if a version could assist you. Is the main goal continuity of conversation (for which daily handoffs can really help)? Agent accountability? Perhaps it's a philosophical standpoint?

The answers to these questions will greatly influence your approach. Once you've clarified your answers, you'll have a better idea of why and how to support your customers. More specifically, you'll know if implementing a follow-the-sun system—or some variation—is right for you.