

Guide To Selecting Customer Service Software for the Enterprise

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Introduction

During the past few years, support organizations have faced increasing amounts of pressure to deliver better service over a broader range of channels, including the Web, email, social networks, and mobile devices. In this white paper, we illustrate several new dynamics that are impacting businesses and then present a series of three essential guidelines to help your organization thrive in this new environment.

We get started by examining how client expectations about customer support are much higher than in the recent past. Your customers expect to communicate with you at any time of the day or night, using a variety of different channels such as social media, phone calls, the Web, text messages, email, and so on. They also presume that you'll keep track of all interactions, no matter how they began or continued.

Meanwhile, your employees (whether executive management or entry-level support staff) assume that your help center software will deliver a consistent view of the client, and will present this information on any platform or device. Despite these heightened expectations, management is often unable to invest the time, resources, and training that have typically been required to expand or improve customer service.

Mid-to-large sized enterprises are particularly susceptible to these new pressures, given the thousands-to-millions of clients that they support, the number of transactions that they process, their multinational and multilingual workforce, and the budgetary pressures that prevent adding staff to keep pace with client acquisition.

After painting this distressing picture of today's support landscape, we demonstrate how customer service technology constructed using three basic principles can help organizations of any size transform these support obstacles into competitive advantages, while improving both probability and customer satisfaction. The three principles for customer support software are:

- It should be easy to deploy and use.
- It should be architected to address modern support realities.
- It should be designed with the enterprise in mind.

We'll showcase how Zendesk has put these principles to work and helped thousands of enterprises deliver better service and turn their customer service software into strategic assets.

The intended audience for this paper is anyone responsible for ensuring that customers remain satisfied, as well as IT and other professionals tasked with evaluating and/or implementing support software.

Why Customer Service Software Must Change to Keep Up

Many enterprises have discovered – sometimes the hard way – that their clientele are far more connected, sophisticated, and opinionated than ever before. Not surprisingly, this maturation has also extended to the ranks of employees. Let's see how this evolution has impacted both the process of delivering support as well as the software necessary to carry out these tasks.

Customers choose how they communicate with you

It's no longer possible to dictate to your customers how you're willing to support them. Instead, your clients are selecting their own, individual channels that they'll use to interact with you. In addition to traditional phone calls and emails, these new conduits include:

- Chat
- Mobile devices
- Text messages
- Social media
- Web

This phenomenon is particularly prevalent for establishments that support mass-market constituencies: they often serve millions of customers. Even though these clients are bombarding your support team from all directions, they expect you to keep track of all interactions, even if the conversation begins in one medium and continues in another.

Some enterprises have attempted to bring order to this chaos by publishing a formal support policy, along with authorized channels. Unfortunately, customers generally don't read policies, and will simply take to the Web or social media to complain – usually loudly.

Listening can pay big dividends

Overwhelmed by a cacophony of customer communications, many organizations are simply identifying the channels where complaints are occurring and just “listening in” in an attempt to address client problems. Failure to expend even this basic level of effort can lead to letting embarrassing dialogues and enraged diatribes about your product or service go unanswered, thereby turning a minor problem into a major PR fiasco.

On the other hand, by being proactive, you can appear to be an organization that “gets it” regarding support. This zealous approach delivers tremendous value while greatly diminishing the effort you must expend to correct a problem that could otherwise be blown out of proportion due to a lack of monitoring.

Customers expect answers faster than ever before

Regardless of how they initiate a conversation, customers also now have shortened response expectations. While some answers may be synchronous (i.e. conveyed as part of an active conversation with a customer), and others may be asynchronous (delivered at a later point in time), long intervals between the presentation of a problem and its resolution are not acceptable anymore. In fact, the amount of time it takes to address a question is often equally as important as the quality of the answer.

Lengthy and expensive support software investments are history

As enterprises work to update their support software infrastructure to keep up with the expectations of today's demanding clients, they're no longer willing to make the major investments in hardware, software, professional services, and training that have traditionally been dictated by enterprise software vendors.

This new frugality, along with an unwillingness to expend 6-12 months for installation and customization prior to going live, has served as the impetus for many establishments to move to cloud-based Software-as-a-Service (SaaS) software solutions. This has become an attractive alternative to purchasing on-premise packages or attempting to build "home-grown" applications.

Users will resist an unfriendly support package

It's not enough for customer service software to be cost-effective and capable of being placed into production promptly: it must also be intuitive and easy to use. Younger employees, who make up the preponderance of support staff, have grown up with easily-understood, consumer-oriented software that runs on many devices. They demand nothing less from the software they use at work to support their customers. This is especially urgent given that there is a high degree of turnover in support staff, which means that a long learning curve isn't feasible: users must be productive nearly immediately, with minimal training.

Everyone works in support

Finally, since progressive organizations recognize that every employee is responsible for customer satisfaction, it's apparent that customer service software now reaches far beyond the help desk. As we'll soon see, enabling cross-constituency interaction with support-oriented data has major ramifications for the process of choosing technology to aid the support process.

Three Best Practices for Selecting Customer Service Software

While there are many new challenges that make providing high-quality technical support more difficult than ever before, a few simple guidelines can be of tremendous assistance in conquering these impediments.

1. The solution must be designed for quick and easy deployment

As we observed earlier, few organizations are still willing to tolerate the customary multi-month enterprise software installation accompanied by armies of high-priced consultants. They've learned the hard way that expenditures on hardware, software, customization, training, and support must be strictly controlled to prevent the cost overruns and perpetually slipping schedules that have plagued so many software initiatives.

Pilot projects and proofs-of-concept, often using cloud-based SaaS solutions, are an excellent technique to manage risk and demonstrate value very quickly. Zendesk has embraced this approach: the vast majority of its 5,000+ clients began with a free trial and quickly expanded to a full production instance.

As a pure SaaS solution, Zendesk imposes no hardware purchases on your organization, nor does it require any software to be installed on your computers. Users interact with Zendesk via a Web browser or using their choice of mobile platforms such as smart phones, tablets, and so on. In fact, the full Zendesk application is available on the iPad, rather than a minimal subset. This demonstrates Zendesk's commitment to multi-mode application usage.

Employees and customers both benefit by interacting with Zendesk's easy-to-understand, intuitive user interface. In fact, the quality of this design has been a major contributing factor to Zendesk's impressive client acquisition rate. Clients recognize that providing these two vital constituencies with well-designed, productive tools is the first step in delivering great customer service.

Many support software implementations get bogged down during the initial configuration, as endless customization is needed to make the solution fit the client's needs. In contrast, Zendesk is designed to work "out of the box", with little or no alteration. It offers ready-to-use customer request Web forms, pre-staged community forums, and a knowledge repository. This pre-built infrastructure means that you're ready to start tracking issues within minutes, and are able to quickly integrate with your existing CRM, ERP, and other internal systems. If you do need to customize Zendesk's behavior, look-and-feel, rules, and so on, you can easily do so without complex programming.

Given the amount of time-consuming customization required by many support software implementations, some organizations have elected to embark on an initiative to construct a 'home-grown' support application to meet their unique needs. Zendesk represents a more efficient approach, removing the need to acquire hardware and supporting infrastructure software such as operating systems, databases, application servers, and so on. The years of best practices embedded in Zendesk let you focus on your core line of business, rather than attempting to construct and maintain mission-critical, enterprise-class software.

"Within 15 minutes we had our customized help desk running and were able to receive tickets. You are able to learn as you go. You can use Zendesk right away then grow into the advanced features comfortably and at your own pace."

– PAUL BICKNELL,
ONDEMAND OPERATIONS
MANAGER, SAP

2. The solution must address modern support realities

While it's imperative that your chosen customer service software get up-and-running quickly and easily, it's equally critical that it be designed to address the changing face of customer support that we recounted at the start of the paper. Recall that customers expect to notify you of a problem at any time, day or night, using the device of their choice. Once the customer has alerted you to their grievance, they expect an answer quickly and aren't content to sit by until normal business hours.

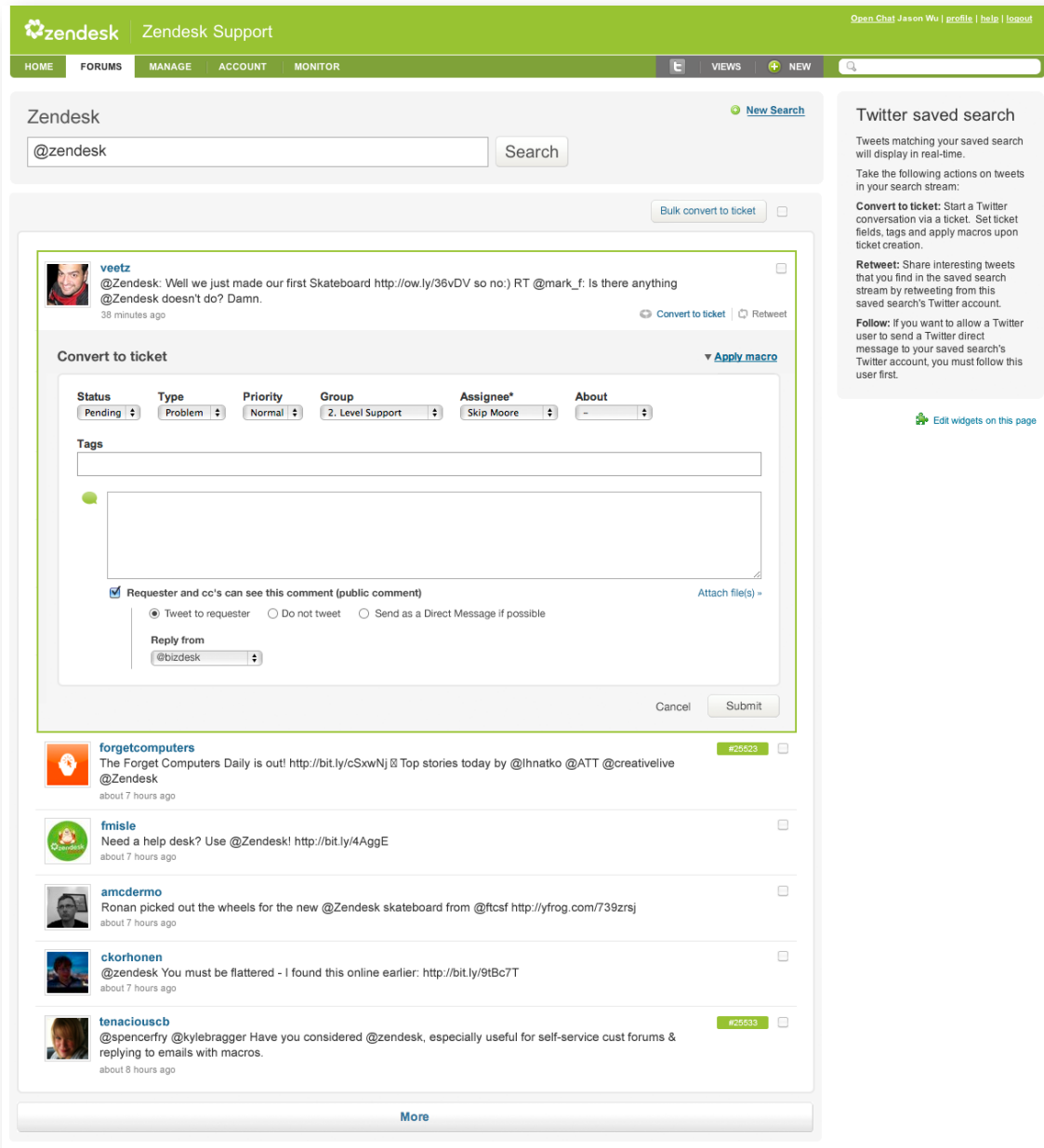
Social media has been one of the more popular avenues for these new classes of support contact. Unfortunately, most enterprises are neither capturing nor organizing these valuable conversations, which means that opportunities for learning from problems are lost forever. In addition, far too many organizations restrict internal access to their support solutions. This artificial barrier hampers effectiveness, since everyone has a role to play in support. For example, a marketing analyst may wish to create a case based on a customer tweet, while a finance clerk may desire to do the same from a billing complaint.

Rather than repurposing an aging system or adding new capabilities as an afterthought, the creators of Zendesk elected to take a fresh approach when creating their solution. This new thinking is evident throughout the application.

Since customers will now communicate a support issue through many different channels, Zendesk is able to create cases from traditional avenues as well as:

- Web
- Email

- Chat



- Social media
- Community forums

Figure 1 – Support Agent View of Zendesk Interface to Convert a Tweet Into a Ticket

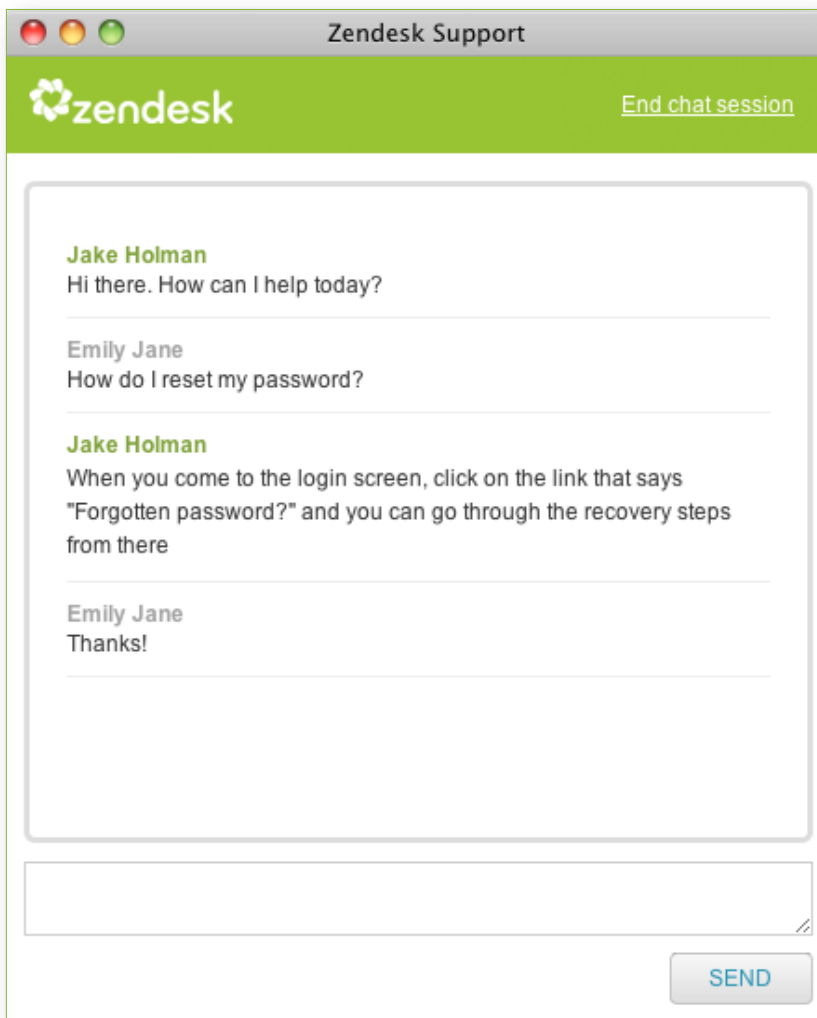
Zendesk also supports the wide variety of mobile devices that clients now use, including:

- iPhone
- BlackBerry
- Android

Regardless of how the customer communicates an issue, Zendesk creates and maintains a consistent view of the client. For example, a customer may start a conversation via Facebook. However, you may want to continue the discussion via email for privacy. No matter how the interaction proceeds, Zendesk will keep track of all the details.

Because of its ease-of-use, multi-device support, and logical view of clients and their associated issues, Zendesk has transformed the support process for its customers. In fact, many Zendesk clients are now able to offer extended levels of support beyond traditional business hours. This added level of customer care is being accomplished easily and with a minimal amount of disruption.

Zendesk also revolutionizes how cross-department interaction can streamline client support and shorten response cycles. For example, the engineering team can conveniently view and address support issues proactively, rather than passively waiting to be notified of a problem before taking action.



“Zendesk helps us support our parking kiosk customers in more than 100 U.S. cities, college campuses and privately-owned parking lots. Zendesk chat gives us yet another way to quickly solve customer issues, so we can increase parking equipment uptime, ensure customer compliance with parking programs and improve the bottom line of any parking operation.”

– FOREST ANDERSON,
CUSTOMER SUPPORT AGENT,
CALE PARKING

Figure 2 – Support for Live Chat within Zendesk Interface

3. The solution must be designed with the enterprise in mind

An easy-to-use application that supports today's multi-channel communications is just the start: mid-to-large enterprises have additional needs that outstrip the capabilities of retrofitted or repurposed legacy solutions, and are often impossible to create in a home-grown application. These requirements include:

- Larger numbers of clients to support
- Substantially bigger product lines
- More employees, organized into multiple teams
- Geographically dispersed locations
- Multi-lingual operations
- Complex workflow

While a support solution initiative may start out as a pilot project, it often quickly grows to hundreds or thousands of users, meaning that these capabilities need to be present in the core product instead of purchased (or developed) later. Since Zendesk was created to bolster the modern customer support organization, enterprise-class features were built in from the start. Let's examine these characteristics in the context of manageability, workflow, business intelligence, and integration.

Manageability

To help administrators perform their daily responsibilities more effectively, Zendesk includes:

- **Secure infrastructure.** Zendesk is hosted in highly-secure physical locations that are protected by multiple layers of security along with redundant network connectivity, power, and cooling.
- **Visibility controls.** Administrators have significant control over who is permitted to see your data.
- **Single sign-on.** Users can access Zendesk using any third party user authentication or directory access service, such as Microsoft Active Directory.
- **Encryption.** All communication with Zendesk is conducted over SSL.
- **Moderator settings.** Trusted users may be granted this permission level, which lets them administer forums.
- **User interface customization.** You're free to change the look-and-feel of Zendesk via CSS and email templates. You can use Zendesk as-is, or completely customize its appearance to match your company's needs.
- **Audit trails.** Zendesk maintains a permanent record of the changes that have been made to your data.

Workflow

Supporting diverse, complex products and services requires flexible, adaptable software that can keep up with your business procedures. Zendesk's workflow-oriented capabilities include:

- **Rules engine.** Zendesk's rules engine makes it easy to automate important processes such as ticket escalation and notification. These rules can be customized according to individual preferences, within management-defined boundaries.
- **Data extension and customization.** You're free to add your own unique fields to your Zendesk tickets. These fields are also available to the rules engine.
- **Customer interaction.** Your clients can also play a role in voting on their favorite support responses, and you're free to moderate what ends up being published.
- **Localization.** Zendesk supports more than 40 languages and is meant for global deployment.
- **Macros.** Users can preserve their most frequent Zendesk interactions and tickets as macros. These can then be played back later making it easy to deliver consistent responses in shorter time. Macros can be automated and customized to provide personalized responses to common issues.

Business intelligence

Anything you can do to organize and learn from the flood of customer-generated data can yield impressive benefits. Zendesk offers impressive business intelligence capabilities, such as:

- **Search.** Zendesk offers a unified search interface. Users can query for tickets, topics, forum threads, groups, and organizations. Advanced support syntax is also available.
- **Filtering.** You can configure views to narrow the search results returned when querying objects such as tickets, tweets, and other customer-supplied information.
- **Reporting engine.** Zendesk includes a full-featured reporting platform, with a collection of useful standard reports as well as the ability to define your own set of custom reports.
- **Analytics.** In addition to its built-in reporting and analysis capabilities, Zendesk also provides integration with GoodData, thus enabling rich dashboards and advanced analytics.
- **Ecosystem.** An entire ecosystem consisting of dozens of value-add solutions has arisen around the Zendesk platform.

"Zendesk's reports help motivate us. We like knowing that we've increased our productivity by a certain percentage month-over-month. The reports are highly configurable, so that I can get exactly the data I need to show my colleagues and superiors on a regular basis."

– CATHY MCCANN,
HELP DESK SUPERVISOR,
UCLA DEPARTMENT OF
PSYCHOLOGY

Integration

Since a support application is only one part of a larger enterprise software portfolio, it's crucial that its information be accessible from these other applications. Zendesk offers integrations with the leading enterprise cloud applications including Salesforce.com, NetSuite, Google Analytics and more than 60 others. This makes it easy to have two-way integration with your CRM system. You can also build your own integrations using Zendesk REST, Email and JavaScript APIs. The JavaScript API also makes it possible to integrate different web applications and sources of data. You can easily create Zendesk widgets that make it possible to share data between applications. Finally, you're free to export all of your Zendesk data whenever you want using CSV and XML file formats.

Conclusion

For your organization to keep pace with its competitors, your customer support process must change. Your clientele have much higher expectations about how and when you'll support them, and they expect you to keep track of all interactions. At the same time, your employees need your support software to provide the same ease-of-use and quality that they're used to on their smart phones and Web browsers. They also want to access their data from anywhere at any time, and they depend on the support application to automatically and logically tie together all threads of the customer care experience.

Zendesk was created from the ground up with these new realities in mind. It understands that customers want support at a place, mode, and time of their choosing, and that it's important that users of support software actually enjoy using this essential technology. Zendesk also grasped the fact that few organizations are willing to purchase arrays of servers and other infrastructure to launch a support software initiative, which is why their solution is a cloud-based, zero-install application that still provides enterprise-class capabilities.

How to Get Started

Visit us to sign up for a free 30-day trial with full access to all features at www.zendesk.com.

About Zendesk

Zendesk is the proven cloud-based customer service software that is the fastest way to enable great customer service in rapidly growing companies. Zendesk is so easy to use, it's loved by support teams and their customers worldwide. More than 20,000 organizations including Adobe, OpenTable, and Groupon, trust Zendesk with their most valuable asset: their customers. Now, organizations can deliver exceptional support across the web, email, and social media. Learn more at www.zendesk.com.

