

An Enterprise Guide to Integrating Salesforce with Customer Service Software



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Introduction

Customer relationship management (CRM) software used to be the domain of IT and sales departments. Today, it is a significant concern for CEOs. Gartner's CEO Survey for 2012 indicated that CRM is top of mind and that it is CEOs' most important area of investment to improve their businesses over the next five years. They are recognizing that the key to every organization's success is to build strong customer relationships that will increase customer satisfaction and loyalty, ultimately resulting in higher revenues.

By establishing a customer-centric vision and tactical strategy, creating a great customer experience is the focal point of today's leading companies. However, technology also plays a critical role in providing the infrastructure and tools to implement this vision and build it into a company's daily processes.

CRM initiatives undertaken without paying adequate attention to the needs of the customer service department often fail to deliver on corporate goals of increased customer-centricity and improved customer satisfaction. Nowhere within an organization is the opportunity to use CRM to deliver an exceptional customer experience, and build lasting customers relationships, stronger than within the customer service department.

Analyst firm Gartner forecasts that worldwide software as a service (SaaS) revenue will reach \$14.5 billion in 2012 and \$22.1 billion in 2015.

Customer service personnel constitute a customer's primary post-sale contact with a business (and often a key pre-sale or sales contact, as well), making them the front line in customer retention, satisfaction, and relationship management. Service representatives are the "face" of the organization to most customers, and the impression they make on customers has a direct impact on how customers feel about the company and its brand, and whether they continue to do business with the company over the long term.

Given the importance that a company has for both a CRM system, like Salesforce, and a customer service system, it only makes sense to implement a solution that integrates these systems via a seamless, two-way integration. Therefore, all the relevant customer information will be available within both applications in order to best serve the customer.

Achieving a Holistic View of Your Customers

Customer service does not occur in a vacuum. On one hand, CRM applications do not provide complete insight into the customer lifecycle, but on the other hand, if customer service interactions are tracked in a separate system they remain disconnected from sales and marketing activities. This means that companies most likely miss opportunities to transform service into sales, resulting in lost revenue and lower customer satisfaction.¹

If a company has the ability to see all activity associated with a customer account at every point in the customer lifecycle, people can make more intelligent decisions on how to approach and engage with each customer. Therefore, it makes sense to integrate your company's Salesforce CRM solution with an agile, smart and convenient customer service platform to gain complete visibility into your customer relationships.

¹ Service & Support at the Speed of the Customer, Frost & Sullivan

The “new” sales cycle

Companies put a lot of effort into every step of the traditional sales cycle, from establishing a lead to closing a sale with a customer. For each of these steps it is crucial that both marketing and sales teams have full visibility into the customer. This way, salespeople will know what each customer’s needs are and can craft a sales strategy to help address those needs.

The last part of a sales cycle, closing a deal, can be one of the most fragile ones in the process. Any small error or miscommunication might derail the process and cause delays, or have the deal fall apart completely. For this, salespeople need to have every bit of detail about the customer including complete insight into the customer service interactions. The importance of customer service data in the sales process has created a “new” sales cycle. Today, 21st century enterprises are beginning to recognize that there is a new “sales cycle” that requires a marriage of CRM and Customer Service data.

A potential customer may have submitted several support requests to the customer service department, regarding problems they were having with the product. If the salesperson involved in closing the deal is not aware of these concerns from the customer, he might decide to close the deal prematurely, only to be blindsided by these unanswered support requests. This will most likely cause the customer to be dissatisfied about the level of communication in a company. It might even signal that the salesperson is only interested in generating revenue from the deal, instead of having the customer’s long-term interest in mind. To avoid such situations, the sales rep should have complete visibility into all of the customer interactions.

The new face of customer service

What does the customer service department want from a CRM system? That’s simple: a system that will help them provide faster, better support to customers. Customer service representatives want a system that will give them the tools and information they need to answer customers’ questions and resolve their problems – on the spot, in the first call or interaction – keeping customers satisfied and loyal.

As the role of customer service has evolved in 21st century companies, customer service representatives need direct visibility into the sales and financial processes stored in the CRM platform. This way, customers will feel that they are dealing with a single organization that knows them and cares about their concerns, which creates strong brand loyalty.

For example, although two customers may call into a contact center with an identical service issue, an enterprise can differentiate the service it provides both customers if it can see that one customer is in the midst of a lengthy sales process, while the other customer has had no further contact with the company since the initial product purchase. That information could also make the timing for an upsell offer ideal for the first customer, but not for the latter one.

Best Practices to Integrate Salesforce With Customer Service Software

It is very important that enterprises select customer services software that will seamlessly integrate with Salesforce, and allow users within the organization to have a complete view of all customer interactions. There are many considerations to be made when deciding which customer service software to integrate with your Salesforce solution. Fortunately, there are a few guidelines to guide this decision-making process.

The customer service software must be highly flexible and intuitive

Salesforce serves companies of all sizes and industries and with a variety of needs. Therefore, the customer service solution that is used to integrate with Salesforce should be highly flexible and intuitive, allowing customers to get started in minutes and have it easily adapt to their business needs.

Zendesk is web-based customer service software that is easy to set up and easy to get started. It was built on the idea that customer service software does not have to be complicated and cumbersome, and really should be focused on what matters: delivering exceptional customer service to customers. As a pure SaaS solution, Zendesk imposes no hardware purchases to organizations, nor does it require any software to be installed. It also supports the modern communication channels customers are using, including email, chat, web, mobile applications, community forums, and social media, such as Twitter and Facebook. This enables enterprises to stay on top of all customer conversations and respond to issues quickly and proactively.

In addition, because of Zendesk's open API (Application Programming Interface) it is easy to integrate Zendesk with virtually any web-based application. Zendesk currently supports more than 90 integrations with popular third-party applications in a variety of categories, such as CRM, analytics and E-Commerce. Salesforce is one of Zendesk's most popular integrations: It is a two-way integration that allows users to access Salesforce CRM data from Zendesk and Zendesk data from Salesforce.

"In terms of getting started and adding users, we don't think any other system can compare to Zendesk. Our operations from Florida to Montreal to Sweden are giving the online help desk system high praise.

– JEFF NETHERY,
CUSTOMER SERVICE
DIRECTOR, CALE PARKING

Solution must have access to customer data from within Salesforce

As discussed earlier, it is crucial that the customer service solution a company chooses enables sales and marketing teams to access support data from Salesforce. This way, companies can deliver a personalized sales strategy for each customer relevant to their pain points and needs.

With Zendesk for Salesforce, sales reps can seamlessly see any support incidents from within their Salesforce application in real-time, without having to switch screens or login to a new system. The customer service incident information has been populated based on the Account, Contact, Lead or Opportunity that a sales rep is looking at in Salesforce. Salesforce users can also filter Zendesk data by status, priority, and type, making sure that they are paying close attention to those they deem as most important. Users can also seek the status of any outstanding customer request and when these were created and updated to ensure they don't get blindsided by any unanswered customer requests. In addition to this, users who have accounts in both Salesforce and Zendesk can update and create Zendesk incidents within the Salesforce platform.

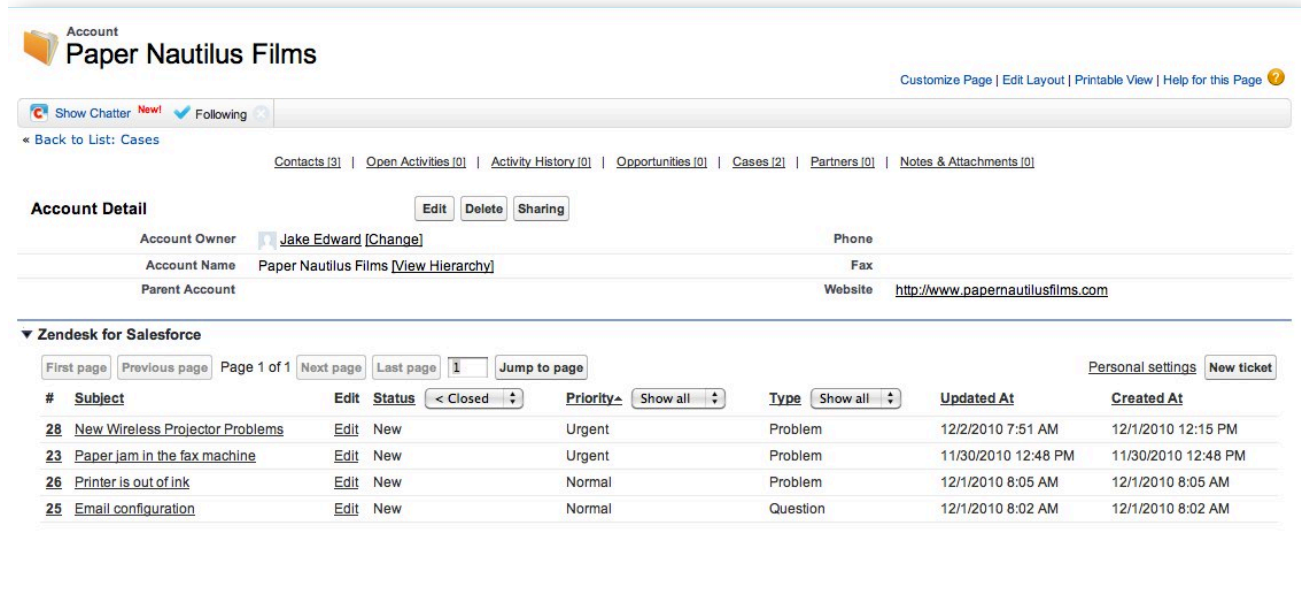


Figure 1 – View, filter, and update Zendesk data from within Salesforce application

Solution must have access to Salesforce CRM data from within the customer service system

The ability to seamlessly access Salesforce CRM data from your customer service solution is also a must. This way your customer service agents will have a 360-degree view of each customer and can provide the appropriate amount and quality of support based on each customer’s relationship with the company. For example, a company should make sure that its largest and oldest client gets an extra level of care and attention when it contacts the customer service department.

With Zendesk for Salesforce, customer service agents can view and customize which Salesforce attributes to access from within the Zendesk interface, without having to switch screens or login to a separate system. This enables agents to have full visibility into all customer relationships, so they do not have to spend time looking for more information and can focus on their main responsibility of providing exceptional customer service.

Because every company is unique, the information that each company wishes to access from their Salesforce system is also different. With Zendesk for Salesforce, mapping fields from Salesforce record types to Zendesk user profiles is as easy as selecting and adding fields from one column to another. Support agents can then view Salesforce CRM data in the existing Zendesk user profile widget, on the right-hand side of the product, as well as click on this widget to view an expanded version of the record fields that were previously mapped to Zendesk.

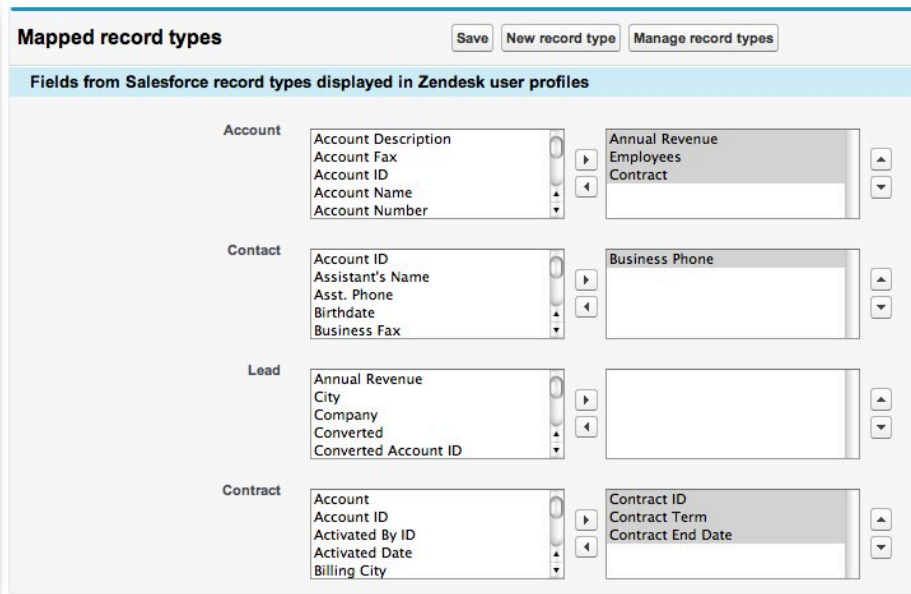


Figure 2 – Map fields between Zendesk and Salesforce

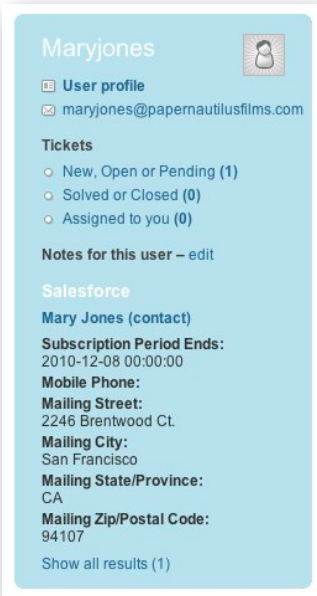


Figure 3 (left) –View information mapped from Salesforce within Zendesk user profile widget

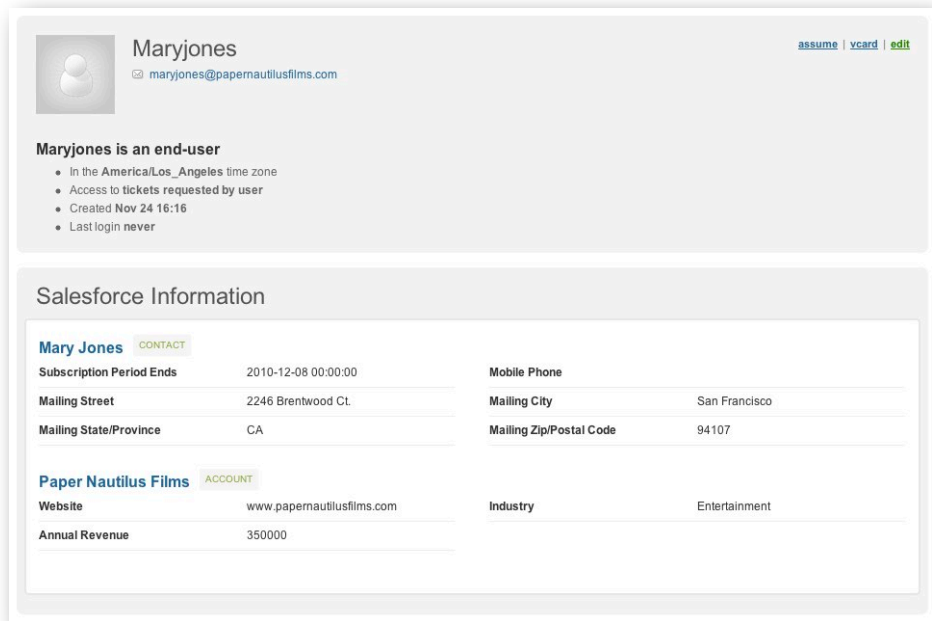


Figure 4 (right) –View expanded user profile information mapped from Salesforce within Zendesk

Solution must create reports from both systems

Finally, the integrated CRM and customer service solution must enable users to create reports with the aggregated data. Business intelligence is extremely useful to analyze trends, the health of the business, and make intelligent business decisions based on this information.

With Zendesk for Salesforce, enterprises can easily tap into Salesforce’s advanced analytic capabilities by pushing Zendesk incident into Salesforce cases and create reports based on this aggregated information in order to make intelligent business decisions. For example, you can easily create a report that shows the distribution of support requests per account, or the average resolution time per account.

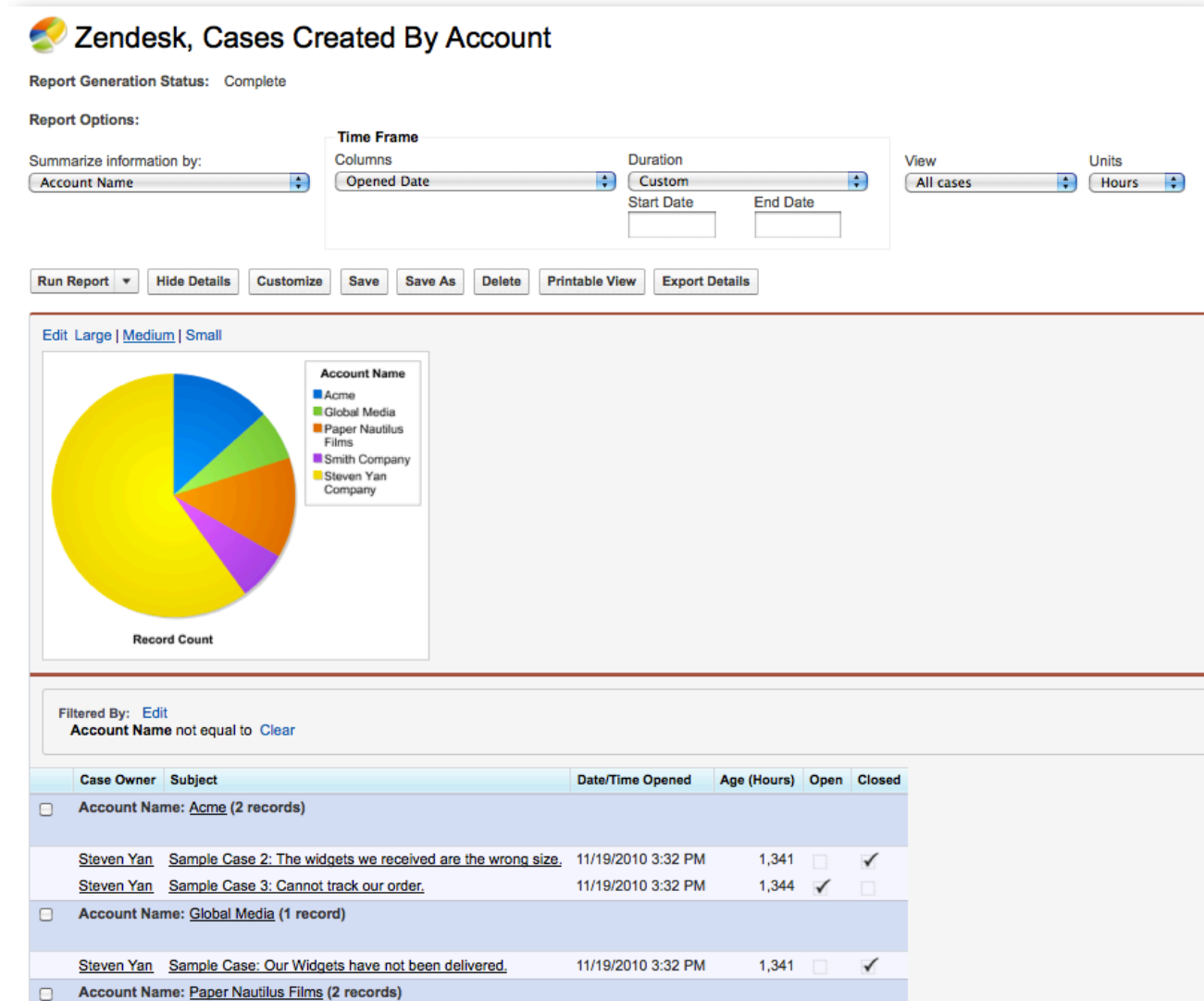


Figure 5 – Create reports with aggregate data by pushing Zendesk data into Salesforce cases

Conclusion

The key to a thriving business is creating a growing pool of happy and loyal customers. To achieve this, many enterprises are establishing a customer-centric vision and tactical strategy in order to provide exceptional customer experience. Therefore, it is imperative that companies closely track all of their customer interactions throughout the customer lifecycle.

An Enterprise Guide to Integrating Salesforce with Customer Service Software

Many enterprises rely on Salesforce as their CRM system, in order to record all information relevant to a customer account. It is also necessary to implement a reliable web-based customer service system, like Zendesk, to make sure that support requests are handled in a timely manner. By integrating these two systems, enterprise can close the loop from sales to support and gain complete visibility into all customer interactions, in order to engage in a more personalized manner with each customer, and address their specific needs.

Zendesk for Salesforce provides a two-way integration between Salesforce CRM and Zendesk customer service software. Through this seamless integration, customer service agents can access Salesforce customer data from within Zendesk, and sales reps can access customer service data from within Salesforce. In a few words: companies get the best of both worlds, Salesforce and Zendesk, with one easy-to-setup integration.

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. Contact Zendesk to get started at +1 (415) 418-7506 or email sales@zendesk.com.

For more information on how to setup Zendesk for Salesforce, visit <https://support.zendesk.com/entries/348360-zendesk-for-salesforce-getting-started>.

About Zendesk

Zendesk is the leading provider of proven, cloud-based help desk software. For growing organizations, Zendesk is the fastest way to enable great customer service. More than 15,000 Zendesk customers, including Adobe, Sony, OpenTable and Groupon, trust Zendesk with their most valuable assets: their customers, partners, and employees. Learn more at www.zendesk.com.



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