

# MATCHMAKING IN THE CLOUD

## A PERFECT MARRIAGE OF SALES AND SUPPORT



### EXECUTIVE SUMMARY

This paper describes why integrations of best-of-breed tools in the cloud will outperform standard all-in-one platforms. Cloud ecosystems that support the aggregation of superior software products will outclass traditional platforms that offer inferior products, however integrated. In other words, integrations of best-of-breed tools offer more to organizations and their customers than integrated suites of mediocre tools can. Simply put, SaaS is disrupting the traditional enterprise software market.

Today, intense focus on the customer is a fundamental way an organization can create what it wants most: customer satisfaction, loyalty, and increased business. Focusing on the customer means knowing them, understanding them, and responding to them. There's a vital place to do this: the front lines of sales and customer support. For an organization to be successful in this customer-centric climate, it must have the best tools available. These tools should provide easy access to key customer data throughout the entire customer lifecycle. With so much at stake in a fickle marketplace, it becomes clear that having the best products available—and not inferior offerings—is an absolute necessity.

The value of high-quality sales CRM software is obvious. The information captured within these systems, however, is primarily sales-centric. Therefore, the addition of customer support data represents a huge opportunity for increased awareness of customers. Together, the information captured by these two sources can provide organizations with the most complete view of customers possible. By seamless two-way integrations of best-of-breed tools in the cloud, an organization is primed for the best results: satisfied, loyal customers, and a thriving business.

How is this achieved? When an organization provides the best products available—and resists the urge to force customers into lesser solutions, as all-in-one platforms often do—customers feel well taken care of. That's the key component. Combining best-of-breed tools in the cloud delivers because by doing so, an organization demonstrates that it has the customer's best interests at heart.



IN THE PHYSICAL WORLD SCARCITY IS WHAT LEADS TO VALUE.

IN THE DIGITAL WORLD ABUNDANCE IS WHAT LEADS TO VALUE.

—Fred Wilson, VC



### WHY INTEGRATIONS OF BEST-OF-BREED OUTPERFORM ALL-IN-ONE

The debate is not new. The power of today's technology is. Terms, like the times, change. Since the dawn of web 2.0, even the term integration has been applied differently. Traditionally, integration has referred to multiple products within a legacy platform, such as Microsoft. Today, integration—or integrations—often refers to assembling different tools and solutions from multiple sources in the cloud.

Let's define our terms:

**Best-of-breed:** the best available product of its type for a specific purpose

**All-in-one** (aka platform): a set of products offered under one company umbrella

### BEST-OF-BREED VS. ALL-IN-ONE

The ideal way to illustrate the benefits of combining best-of-breed tools versus an all-in-one approach is by looking at sales and support systems. Together, sales and support establish the front lines of an organization. They represent the voice of customers internally (by conveying customer interactions to appropriate departments), and the voice of organizations externally with timely, informed, and coordinated communications.

Creating a great customer experience is the focal point of today's leading companies.



Frost & Sullivan believes that the stakes here are quite high: for enterprises that can actually provide customers with a positive user experience—customer service tailored to their needs, no need to endlessly repeat customer information, customer service agents armed with the correct information at the correct point in the interaction, etc.—the gains in customer satisfaction and customer loyalty lead directly to increased revenues.

—“Service and support at the speed of the customer,” a Frost & Sullivan white paper

Therefore, establishing a customer-centric vision and tactical strategy is essential, and technology plays a critical role in providing the infrastructure and tools to implement this vision. It must be foundational to a company’s daily processes, which are anchored by sales and support.



81% OF COMPANIES WITH STRONG CAPABILITIES AND COMPETENCIES FOR DELIVERING CUSTOMER EXPERIENCE EXCELLENCE ARE OUTPERFORMING THEIR COMPETITION.

—Peppers & Rogers Group,  
2009 Customer Experience Maturity Monitor



Without question, then, having the best products available for sales and customer support services and data is a must. And when these superior products are used in concert (see: School of Rock), with seamless integrations, the result is a huge win-win for organizations and their customers.

The above line is key: An ecosystem that employs several applications working together, fluidly. This is what delivers the best experience to customers. This is what will create customer satisfaction, influence product evangelism, and elevate the organizations that adopt this strategy: An ecosystem of integrated cloud solutions.

Still, some think that an all-in-one formula is the preferable option. They argue, why should we use another company if we can offer a product of our own? They champion the integration of products within their own systems (saying outside integrations are: A) expensive, and B) demanding) and believe keeping customers under one umbrella is better for the bottom line. Maybe. Or maybe not.

Consider: Does an all-in-one platform have the customer’s best interests at heart?

“Companies must demonstrate, in everything they do, that they have their customer’s best interest at heart.”

— MAi Research

In today’s environment, an all-in-one approach seems more concerned with corralling customers and keeping them contained than offering the best products and services available. Think back to Fred Wilson’s quote. In the digital world, abundance is paramount. A philosophy based on scarcity or rigidity will not win the day.

With today’s premiums on customer satisfaction so high, there’s little chance these customers will remain loyal for the long term using lower-quality products—especially when superior products exist everywhere on the market.

#### CUSTOMER CASE STUDY - SCHOOL OF ROCK

When a new school opens, School of Rock delivers a suite of best-of-breed tools to get started and open its doors to students. School of Rock needed a customer service platform that not only fit this toolkit, but also delivered a great end-user experience while at the same time giving agents a system to be more effective. After evaluating several customer service platforms, School of Rock added Zendesk to its ecosystem that includes Google Apps, NetSuite, Box, and other cloud solutions.

#### RESULTS

With Zendesk, School of Rock has seen the following results:

**FRANCHISEE SATISFACTION RATING:** 95%

**TICKET VOLUME REDUCTION:** 42% decrease in number of tickets, from 378 tickets in March 2012 to 219 tickets in September 2012

**COST SAVINGS:** 66% reduction in billable help desk hours from February 2012 to September 2012

**CUSTOMER NET PROMOTER SCORE:** 63



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. Furthermore, research has indicated that customers who are impressed by a vendor's resolution of a service issue will in fact be more loyal than those who never had a complaint. Meanwhile, 40% of customers who lodge complaints will consider buying additional products or services from the company if they were happy with the issue resolution. This clearly identifies customer service as critical component in ongoing revenue generation.

—CRM Built for Customer Service,  
January 2009

And, because integrations between companies are more seamless than ever (with constantly updating and elegant APIs, SOA, etc.) worries about costs, maintenance, and usability are quickly becoming worries of the past.

### THE LOGIC OF INTEGRATIONS

Here's a simple analogy: A carpenter loads his tool belt with the best tools he knows. He doesn't care if his hammer is the same make as his screwdriver, what he cares about is having the best tools for the job.

The same logic can be applied to integrations of superior tools in the SaaS cloud. By employing the best available tools—such as the highest quality sales and customer service software on the market—a company, like a carpenter, equips itself to deliver an outstanding customer experience.

What's more, when an organization puts its customers first by combining best-of-breed tools—and not trying to force all-in-one solutions—customers put them first because

they're so satisfied and delighted with the service and support they receive. When this happens, business thrives.

### THE BEST-OF-BREED: SALES CRM

A sales CRM—a web-based customer relationship management (CRM) system—provides a great way to manage the relationships an organization has with its customers and prospects. A sales CRM enables a company to have detailed information about customer accounts in a centralized platform, and provides great value for the sales and marketing teams by:

- **Tracking from lead to close**—capturing sales data in one place at every stage
- **Providing a view of customers**—a picture of histories and sales interactions
- **Maintaining customer data**—accounts, contacts, records, opportunities, etc.

Consider the last part of the sales cycle: closing a deal. It's a fragile step. A small error or miscommunication could threaten the deal's life. When salespeople know more about their customers, when they have access to detailed, real-time customer data, the process flows more smoothly and is much less prone to errors. Without the right information, a salesperson can be caught off guard.

Companies put huge effort and resources into every step of the sales cycle, from establishing leads to closing sales. For each step, it's critical that sales teams have as complete a view as possible of their customers. A sales CRM gives salespeople ready access to detailed customer information which helps them craft sales strategies that address clear needs based on what they know about their customers.

A sales CRM provides great sales data. It's built for that purpose. However, other key data exists. Without question, the more pertinent and rich customer data accessible the better, and nowhere within an organization is the opportunity to enhance the sales CRM data stronger than within customer service with customer support data. A salesperson will greatly enhance awareness of his customers and their interactions by incorporating another source—customer service data—into his sales CRM.

### ANOTHER SOURCE

Another source of customer data comes from customer support interactions. Just imagine the awkwardness of an interaction between a salesperson and a customer when the customer has submitted multiple support requests—and the salesperson has no idea. What if a deal is ready to close and the salesperson isn't aware that problems have occurred? A customer will surely be turned off by an

attempt to move forward. He'll feel ignored and, worse still, he'll assume his problems *aren't known about*.

This casts doubt on the level of communication within an organization as a whole, and creates serious customer dissatisfaction. The message would be: salespeople are only interested in closing deals and don't have the customer's best interests at heart.

This kind of situation can be avoided by making sure all needed and necessary information is available. The ability to deliver an exceptional customer experience and build lasting customer relationships will soar when integrations of best-of-breed sales CRM and customer service software are utilized. *This is how to best serve the customer.*

### THE BEST-OF-BREED: CUSTOMER SERVICE SOFTWARE

Customer service software should transform how organizations engage with their customers. It must be:

- Easy to set up and easy to get started
- Intuitive and straightforward
- Focused on one thing: delivering exceptional customer support to customers

This should include:

- **Easy-to-use ticket management**

Customer service teams need a tool that's built for customer engagement. It needs to be intuitive, with a beautiful and smart user interface that surfaces the information the agent needs and predicts their next-best action. Also, smart ticket management features should make delivering excellent customer service easy.

- **Multi-channel**

Meet customers where they are. E-mail, chat, phone, social media, web portal—every communication channel—needs to be available. Communicate with customers via their preferred channel—it's that simple.

- **Self-service**

Provide a knowledge base this is easy to navigate and powerfully helpful. Allow customers to engage with each other and share opinions—to help each other—and provide an easy means to do so, like with community forums.

- **Best practice workflows**

Best practice workflows are built in, and should include automated notifications to customer and agent, for example, and be customizable. This includes the ability to set different SLAs (service level agreements), ease of sharing and escalating tickets, and options to collaborate on tickets and issues.

Powerful customer service software impacts how organizations engage with their customers. It captures vital information and facilitates good communication.

Given the importance an organization has for both sales CRM and customer service software, the optimal solution should combine the best tools on the market for both, via seamless, two-way integrations. By doing so, the essential customer information required for an organization's long-term success is available within both applications.

### INTEGRATIONS – A PERFECT MATCH

Bringing best-of-breed sales and customer service tools together enables full visibility into customer interactions. No time is spent looking for more information, it's right there. Salespeople and customer service people can focus on their main responsibility: providing an exceptional customer experience.

Customer service agents want the tools and information needed to answer questions and resolve problems on the spot, in the first interaction. This makes them excellent at their jobs, and ensures customer satisfaction. Plus, when customer service agents have a view into sales CRM data, customers get the sense that they are dealing with a single organization that knows them and cares about their concerns—holistically.

When two customers call in with an identical customer service issue, an agent can focus and adapt the service he gives each customer based on pertinent data learned from the sales CRM. He can see one customer is involved in a lengthy sales process, and the other has had no further contact with the company since the initial product purchase. This greatly informs and enhances the quality of the interaction and service.

If a company has the ability to see all interactions associated with a customer account at every point in the customer lifecycle, salespeople, agents and other users can make more intelligent decisions on how to approach and engage with each customer. Therefore, it makes sense to integrate sales CRM with agile, smart and convenient customer service software to gain magnified visibility into customers.

### THE PERFECT MATCH, MADE IN THE CLOUD

When an organization wishes to build a thriving business it must employ the best software tools available. Today, a customer-focused approach is essential to an organization's success, and technology helps create what's wanted most: customer satisfaction, loyalty, and increased business. This can be achieved on the front lines of sales and customer support with software products that provide easy access to all customer data and interactions throughout the entire customer lifecycle.

Many organizations use a sales CRM to capture sales

information and manage accounts, but only specific types of information flow through these systems. By adding another tool to handle and track customer support interactions, another major source of information is now available. Together, these two systems can help organizations bridge gaps from sales to support, and provide more complete views of customers and their important interactions. These organizations are then poised to engage every customer based on specific needs. This will not only satisfy customers, this will delight them.

By seamless two-way integrations of best-of-breed tools, the best sales CRM can be amplified by the best customer service software. Customer support agents can access sales CRM customer data from within the customer service platform, and salespeople can access customer support data from within the sales CRM platform. By implementing both tools, an organization gets the best of both worlds.



Although the common goals for any customer-centric enterprise are the same—efficient, cost-effective contact centers and satisfied customers—the architecture and approach in deploying a cloud solution is significantly different from an on-premise solution. In order to take advantage of the benefits of a cloud model, you must change your way of thinking as cloud customer service provides a level of agility and transformational qualities that will help you successfully impact customer service and the larger customer experience if applied strategically. This will aid you in sustaining a long term competitive advantage in an era when products and services are becoming commoditized at a quicker pace due to globalization.

—“Deploying Customer Service in the Cloud,”  
an Ovum white paper

# ABOUT ZENDESK



Zendesk is the leading provider of proven, cloud-based customer service software. For growing organizations, Zendesk is the fastest way to enable great customer service. More than 20,000 Zendesk customers including Gilt Groupe, Box, and Disney trust Zendesk with their most valuable assets: their customers, partners, and employees. Founded in 2007, Zendesk is funded by Charles River Ventures, Benchmark Capital, Goldman Sachs, GGV Capital, Index Ventures, Matrix Partners, Redpoint Ventures, and Silicon Valley Bank.

Learn more at [www.zendesk.com](http://www.zendesk.com).

## ZENDESK AT A GLANCE

- 20,000+ customers
- 68 million consumers served
- 140 countries
- 275,000+ tickets per day
- 100+ plug-and-play integrations

"Zendesk gives our support team a lot of freedom to operate in a way that best serves our customers. The real benefit has been the immeasurable benefits—the improved agent experience, greater transparency of information, simpler workflow operations, and improved sense of agent ownership over customer issues."

—GILT GROUPE

