

Tame the Email Monster

Moving Customer Support from Email to a Help Desk to Boost Efficiency

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Executive Summary

There was a time when an email inbox was enough to provide online customer service. You simply set up an email alias for support requests, checked it a few times throughout the day, and lived happily ever after. But soon your customer base grew, your organization expanded and you introduced new products and services. That meant more support requests coming in every day, making your inbox bust at the seams, becoming increasingly troublesome to tackle. Once the backbone of your customer support department, email has now become a monster too big and complex to tame.

As companies and organizations grow, the problems with a shared customer support email inbox become even more significant. It is nearly impossible to track conversations. Emails can receive multiple answers from different support agents, often leading to more confusion than resolution. In addition, some emails may never get a response; when enough of those incidents pile up it can lead to serious customer satisfaction issues. And, searching through email for past support requests can be exceedingly time-consuming.

In this paper, we'll discuss how migrating from email to a dedicated customer help desk platform such as Zendesk is the fastest and easiest way to boost the efficiency of your customer service department. We will examine how quickly you can shift away from your current customer support system and set up a help desk platform solution, as well as how it can increase the speed, capabilities, and quality of your customer support department. And, we'll tell you what you can do in the next 24 hours to tame your inbox and gain new tools to support your customers.

All unsolved tickets (22) [List](#) | [Table](#) | [CSV](#) | [RSS](#) | [Edit](#)

Organization	Score	Subject	Requester	Requested	Type	Priority	
Status New							
-		DSLRs as movie cameras	Sammy	May-12	-	-	<input type="checkbox"/>
-		Need a new license key	Mary Jones	May-11	-	-	<input type="checkbox"/>
-		@mondocom Is this article still true since	John M Chou	May-12	-	-	<input type="checkbox"/>
-		I was charged twice for my camera.	Mary Jones	May-12	Problem	-	<input type="checkbox"/>
-		Lost my user manual	Siena Nenners	May-12	-	-	<input type="checkbox"/>
Status Open							
-	<input type="checkbox"/>	hello. my pictures come out all black.	Emily Wilcox	May-12	Question	High	<input type="checkbox"/>
-	<input type="checkbox"/>	can't see my pictures...	Paul Moseley	May-11	Question	High	<input type="checkbox"/>
-	<input checked="" type="checkbox"/>	Help me!	Bob Jensen	May-10	-	High	<input type="checkbox"/>
-	<input checked="" type="checkbox"/>	The shutter does not appear to be	Aleigh77	May-12	Problem	High	<input type="checkbox"/>
-	<input type="checkbox"/>	Time Lapse Photography?	Mary Jones	May-12	Question	High	<input type="checkbox"/>
-	<input type="checkbox"/>	DSLR Help	Emily Wilcox	May-12	Question	High	<input type="checkbox"/>
-		I have a double charge on my credit card	Mary Jones	May-12	-	High	<input type="checkbox"/>
-	<input type="checkbox"/>	Where can I buy a ZD 89	Aleigh77	May-12	Question	High	<input type="checkbox"/>
-		having problems with my DSLR, need	Obie Fernandez	May-12	-	High	<input type="checkbox"/>
-	<input type="checkbox"/>	my surveillance camera isn't working	Paul Moseley	May-12	Question	High	<input type="checkbox"/>

« Previous 1 2 Next »

The Global Inbox

Over time, email has become the new standard for communication between businesses and customers, as well as between internal support organizations such as an IT help desk and employees within a company.

Email is prolific and few people can complain that they get too little email everyday. In fact, in 2010, **107 trillion** (107,000,000,000,000) emails were sent¹. This means there were slightly more than 15,000 email messages sent for every human being on Earth.

Does Email Scale As Your Business Grows?

Without question, email has revolutionized the customer support world. Businesses of all sizes can instantly answer support requests simply by setting up an email inbox. However, email lacks many of the capabilities needed by today's support operations:

- An email inbox is “one size fits all.” It does not allow you to easily view specific requests by designated groups or individuals.
- Email is not able to remind you when a question has been left unanswered for too long.
- Multiple agents sharing an inbox may respond to the same question, often with different answers.
- You must manually update customers when problems are solved or to request satisfaction feedback.
- If your email provider is having problems with their servers, you will not receive new support requests or be able to respond in a timely manner.
- As your customers increasingly use smartphones, tablets, and social media to communicate, your email inbox cannot handle questions sent via text messages, phone calls, live chats, or tweets.
- Emails have a tendency to get buried and searching for them can be very time consuming.

Perhaps the single biggest drawback to email is how easily you can lose track of a conversation with a customer. Emails get accidentally deleted, people get added and removed from email chains, and each email is tied to the inbox it was sent to, meaning you cannot easily work on an email with a colleague. You cannot track overall customer question themes, time spent by agents on each support question, or automatically route emails to the right department. Email is not reliable and these limitations will become exponentially more painful as your customer base grows.

Cloud-Based Software Wholly Focused on Customer Support

Your customer support organization can expect to save both time and energy by using a customer support platform to streamline your current email support processes. Zendesk is a cloud-based help desk software solution that can instantly raise your customer support efficiency through dozens of built-in automations that work right out of the box. With so many built-in efficiencies, you are freed from trying to set up complicated labeling systems or other ways of organizing your email in an inbox.

Zendesk manages support requests by creating what is known as a **ticket**. A ticket is simply a record of all conversations; it keeps everything in one place and keeps your whole team in the loop. By creating a series of recorded events tied to one ticket, agents and customers can stay on the same page. This also creates a level of accountability that can ensure each

¹ [Internet 2010 in Numbers](#), Pingdom Group (January 12th, 2011)

Moving Customer Support from Email to a Help Desk to Boost Efficiency

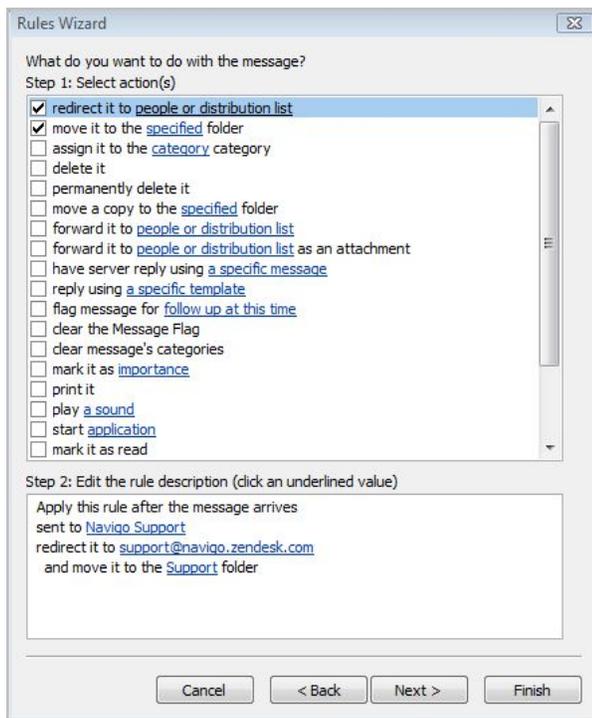
problem is solved quickly. Furthermore, a ticket creates a full audit trail that can give you insight into how your support agents are spending their working hours.

All tickets are visible and can be tracked by the account owner from start to finish. You can give and restrict access to various parts of your help desk as you see fit. With email alone, you are not able to easily access the requests that individual agents are handling, but in Zendesk you have full transparency into how your organization is working. Having full visibility into the customer support process allows you to understand what happens on a daily basis in your organization.

Email Functionality From Day One

Zendesk works with the support email addresses you've already set up, so your customers will not notice any change in how they communicate with your business. Instead, they will notice a much more communicative and transparent customer support experience.

Figure 1 – Setting Up Email Forwarding in Outlook



Most customers prefer to receive email on their own domain address, rather than using the Zendesk provided address. This is perfectly understandable, and 100% supported. This means that you can accept email on e.g. *help@mycompany.com* and forward it to your account on *support@mycompany.zendesk.com*.

A customer who sends you an email will instantly be notified that their request has been received, reassuring them that their email will be responded to quickly. This creates accountability. You can create time-based triggers that will automatically escalate unanswered support requests. Your customers will be notified when their request is considered “solved” by the support agent and is given the option to reopen the ticket if they should need to later. All these steps would have to be done manually with email alone, but with Zendesk, they are completely automatic.

Moving Customer Support from Email to a Help Desk to Boost Efficiency

If you receive the same type of email questions repeatedly, you can set up Zendesk macros, which are standard responses to frequently asked questions. Macros allow agents to respond to common issues with just one click, which significantly increases productivity. Each of your support agents can have their own personal macros to save time and still maintain their personal support style or expertise.

Zendesk is cloud-based and has a 99.9% service uptime. If you have access to the Internet, it is virtually guaranteed you have full access to your help desk and your customer support requests. Zendesk even has mobile apps for iPad, iPhone, Blackberry, and Android that ensure you are able to respond to your customers no matter where you are!

How Does Email Work and Look Inside Zendesk?

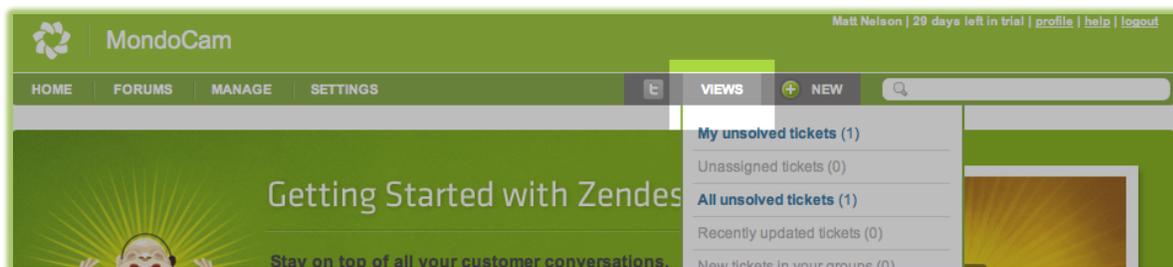
If you already have a support email address you use for customers, simply start forwarding all the incoming mail to your default Zendesk support email address. If you don't yet have a support email address, you will be provided with one when you sign up for Zendesk, such as *support@mycompany.zendesk.com*. You can publish this support email address on your website, business cards, or any other asset that you think would make it easier for customers to contact you with questions.

From the moment you start forwarding your support email, all your communications will be housed in your Zendesk. You will be able to search for and access tickets, chat transcripts, and any other support requests you've received whenever you may need.

You have the choice whether you'd like to use your email or login to Zendesk to interact with your customers. You can respond to tickets directly from Zendesk or your email client, such as Outlook or Gmail. Depending on your settings, you will also be automatically notified by Zendesk when a customer has responded to a ticket.

When a customer email is sent to your server, it is forwarded along to Zendesk's cloud-based servers. The forwarded email will be automatically converted into an *unsolved ticket* and inside your Zendesk, it will show up in your Views menu. To see unsolved tickets, select over the **View tab** on the top navigation of the Zendesk interface.

Figure 2 - Zendesk Menu - "Views" Tab



You can think of Views as multiple inboxes for your support tickets - they can be set up for different types of requests or for agents who handle a certain type of question or are an expert for a specific product. One of the default Views is called "My Unsolved Tickets," which houses any ticket that you haven't yet marked as solved.

Figure 3 – Zendesk Unsolved Tickets View

The screenshot shows the 'All unsolved tickets (22)' view in Zendesk. At the top right, there are links for 'List', 'Table', 'CSV', 'RSS', and 'Edit'. The table has the following columns: Organization, Score, Subject, Requester, Requested, Type, and Priority. There are two sections: 'Status New' and 'Status Open'. The 'Status New' section contains 5 tickets, and the 'Status Open' section contains 10 tickets. Each ticket row includes a checkbox in the Organization column, a subject line, the requester's name, the date requested, the type of request, and the priority level. At the bottom, there are navigation links: « Previous 1 2 Next ».

Organization	Score	Subject	Requester	Requested	Type	Priority	
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-		DSLRs as movie cameras	Sammy	May-12	-	-	<input type="checkbox"/>
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When you want to respond to the customer, simply answer their question and click the submit button in the lower right hand corner. This will update the ticket with all the changes you've made and send the reply to the customer. Zendesk returns you to your Unsolved Ticket View with a message that you've updated your ticket.

What a Customer Sees

When your customers send you emails, they will automatically receive acknowledgement. Later, when your support team has responded, they will receive an email with the full agent response. Customers will not be left wondering if their email got to the right person; both you and your customers will have a record of every interaction. When your support agent has marked the ticket as solved, the customer will be notified and given the option to follow up if needed. You can also set up your Zendesk to automatically send a customer satisfaction survey to gauge the helpfulness of the agent, giving you insight into the performance of your support agents.

How a Customer Responds

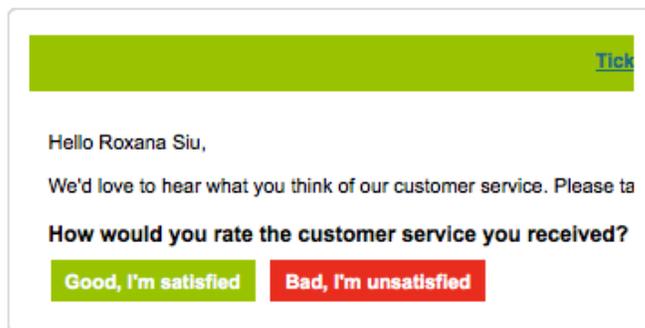
Your customers can respond directly to your email from their personal email account, just like they always have. You can optionally set up your Zendesk to require customers sign into your help desk portal. This can be helpful to direct customers to your knowledge base articles, customer forums, or other documentation that may answer their question. Zendesk supports Single Sign-On (SSO) with many third-party user authentication or directory access services, including Active Directory, SAML, Google, and Facebook.

How Zendesk Keeps Customers Up-To-Date And Saves You Time

Using Zendesk is fast and simple, by design. However, you may like to know what Zendesk does automatically when a customer sends you an email.

- Customer's email travels from their email provider's server to your email server and a copy of the email is forwarded to Zendesk's servers
- Zendesk automatically replies to the customer email, with a customizable acknowledgment of receipt.
- The email is converted into a support ticket and the system applies rules you have set up to apply to this ticket.
- If designated, the ticket can be automatically assigned to an agent or another user can manually assign it.
- When the agent marks the ticket as solved, the customer will receive another email acknowledging the closure of the ticket. The customer is free to reopen the case at anytime simply by replying to the email.
- Optionally, you can also have a customer satisfaction survey sent to the customer to evaluate the effectiveness of your support agents.

Figure 4 - Example of Customer Satisfaction Survey



Importing Your Current Emails and Tickets

Migrating your existing emails to your new Zendesk help desk is easy. Our engineers have built a robust API, including a Mail API that is designed to import backlogs of tickets, emails, and other collateral you may have in your existing system. Setting up this data migration will require a bit of work on your side since most email systems work slightly differently, but the key is that you have the flexibility to add your existing collection of emails to Zendesk from day one.

Reporting Lets You Make Decisions Based On Live Data

Support has different levels - while you can see a lot from the ground level, some things are only visible from a higher plain and Zendesk Reports give you the tools to understand how your help desk functions. This is helpful to see larger trends and patterns in your workflow. For instance, you might want to know how many tickets came in over the past week about a specific issue; or how many problem tickets got created last month vs. how many got solved.

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Zendesk is preloaded with the most frequently used report templates to help you retrieve the important information you need to keep your help desk running smoothly. For example, you can run a “Resolution Times” report that measures how quickly issues coming into your help desk are being resolved. Within the “Reports” tab of Zendesk, you can set the data sets you’d like to monitor and set the span of time you’d like to see a report on.

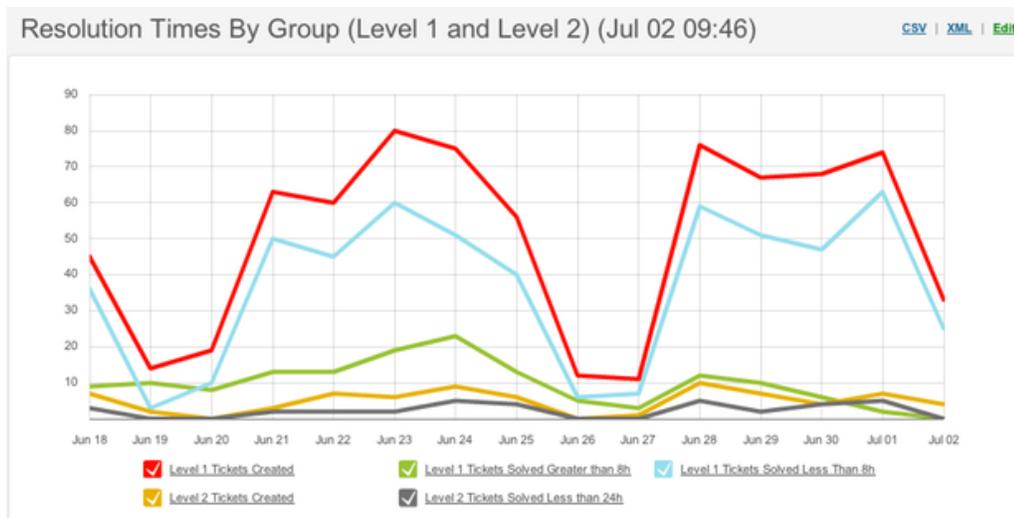
Figure 5 - Data Set Menu in Zendesk

The screenshot shows the configuration for a report titled "Level 1 Tickets Solved Less Than 8h". The configuration includes the following elements:

- Title:** Level 1 Tickets Solved Less Than 8h (with a "Remove" button to the right)
- Created tickets:** A dropdown menu showing "Created tickets".
- Resolution time in hours:** A dropdown menu showing "Resolution time in hours", a comparison operator dropdown showing "Less than", and a text input field showing "8". There is a red minus button to the right.
- Group:** A dropdown menu showing "Group", a comparison operator dropdown showing "Is", and another dropdown menu showing "1. Level Support". There is a red minus button to the right.
- Add condition:** A button with a green plus sign.

Like any high-level tool, Reports are the most useful when reviewed regularly. It is best practice to build a resolution time report and ticket backlog report, then integrating them into a weekly meeting or performance review.

Figure 6 - Resolution Time Report



The Next 24 Hours

What’s next? In just 30 seconds, you can sign up for Zendesk and quickly begin experiencing the benefits of a dedicated,

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purpose-built customer help desk platform. You get a 30-day free trial and we have many excellent resources to help you determine if Zendesk is the right solution for your business or organization. Already have a Zendesk account? Attend one of our webinars. Or, download the mobile app for your smartphone!

Zendesk has a number of resources to which you can turn when you need help or just want to learn more:

- The [Using Zendesk forum](#) has definitive documentation on all the Zendesk features.
- Zendesk holds regular [webinars](#) - live demonstrations and Q&As about how to use Zendesk and many of its features.
- The [Zendesk support forums](#) are an active area of discussion about best practices and new features.

Below are some specific resources that might be of interest to you after this guide:

- [Zendesk Getting Started Guide](#)
- [Managing the Help Desk Workflow](#)
- [Beginning Zendesk Webinar](#)

Gaining business insight with support reporting & analytics:

- [GoodData for Zendesk](#) (webinar)
- [Intermediate Zendesk](#) (webinar)
- [Customizing and extending your help desk](#) (support forum)
- [Zendesk Integrations Overview](#)

About Zendesk

Zendesk is the proven cloud-based help desk software that is the fastest way to enable great customer service in rapidly growing companies. Zendesk is so easy to use; support teams and their customers worldwide love it. More than 10,000 organizations including Adobe, MSNBC, Sony, 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. Since the mobile device explosion having created even more opportunities to help customers anywhere, any time, Zendesk is also available across devices such as the iPad, iPhone, BlackBerry, and Android.



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