



The Zendesk Customer Experience Trends 2019 How-To Guide

How can you make sure your support team is keeping up with the biggest trends in customer support for 2019? We'll walk you through what your team should do in each area.



03

Omnichannel support

08

Building with an open platform

13

Proactive engagement

17

AI in customer support

21

Setting up your team for success

Five steps for omnichannel mastery:

- 01** Roll out an integrated omnichannel approach to customer support.
- 02** Be proactive in building out your help center and extending self-service across channels.
- 03** Ensure that live channels—especially phone support—are integrated into a single solution.
- 04** Focus on meeting customer expectations for responses and resolution.
- 05** Offer your customers the right channel at the right time, and give agents the full context.

01 Roll out an integrated omnichannel approach

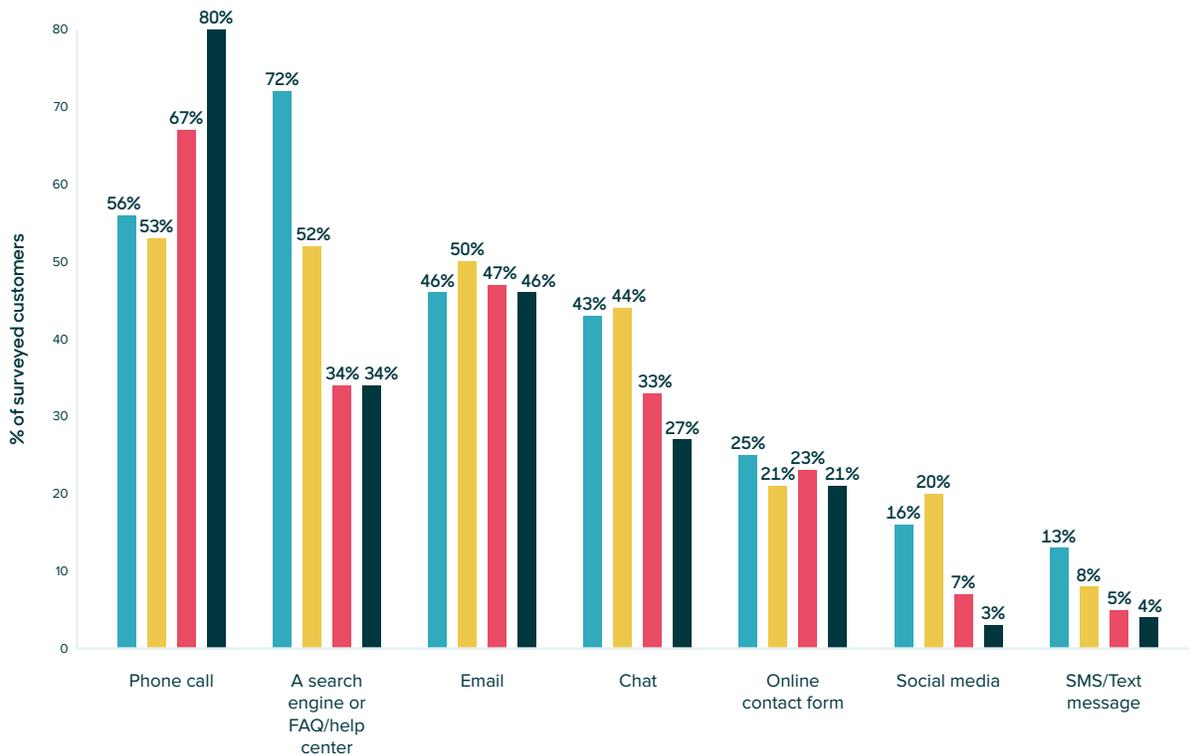
Most companies move quickly to add channels, with both B2C and B2B companies generally launching about three in their first month. Companies should use their understanding of common customer questions and preferences to inform their rollout strategy across email, webform, self-service, and live channels like chat and phone.

Take a look at our findings on customer preferences. Which generations make up the majority of your customer base? How can your support team adapt to their preferences and offer channels that get them efficient responses?

[Get started with omnichannel support](#)

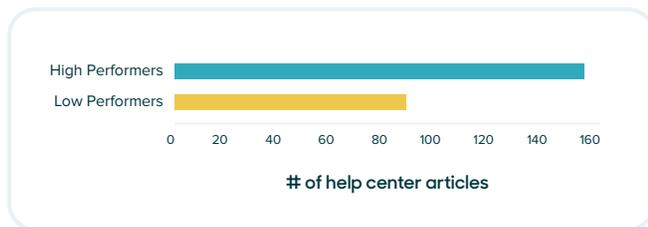
How do you typically resolve your issues with a company?

● Gen Z ● Millennials ● Gen X ● Baby Boomers



02 Add knowledge content and extend self-service

High-performing support teams invest more in self-service. They have 4.5 times more articles in their help centers and a median Self-Service Ratio, which compares self-service content views to a team's total ticket volume, that is more than 30 times higher.



Being proactive when building out your help center is a must. Organizations that focus on building and maintaining a solid knowledge base and continuously improving it over time see 23% lower resolution times, 20% fewer tickets reopened, and 2% better CSAT scores on average.

These organizations are also better at distributing the creation of knowledge base articles among agents. Use features like Team Publishing and the Knowledge Capture app to ramp up your team's knowledge creation. And once you have a solid foundation of knowledge content, extend self-service by offering it across other channels, like your Web Widget and in-app support.

[Build best-in-class self-service](#)

03 Fully integrate live channels, especially phone support

Using integrated chat and phone support leads to a 1.2% boost in CSAT and shaves 25 minutes off a support team's First Reply Time, with all other factors held constant.

Since customers cited automated phone trees as the leading factor driving bad experiences, it's particularly important to integrate phone support. But we're seeing one clear problem: 70% of managers say they're offering phone support, but this doesn't match the share of phone tickets logged by companies using Zendesk. When looking at companies actively using phone support in the past year, phone tickets still make up less than 20% of support teams' recorded tickets.

This means companies using Zendesk are leveraging a completely separate phone system, leaving phone tickets unlogged, agents without necessary context, and customers forced to repeat their information.

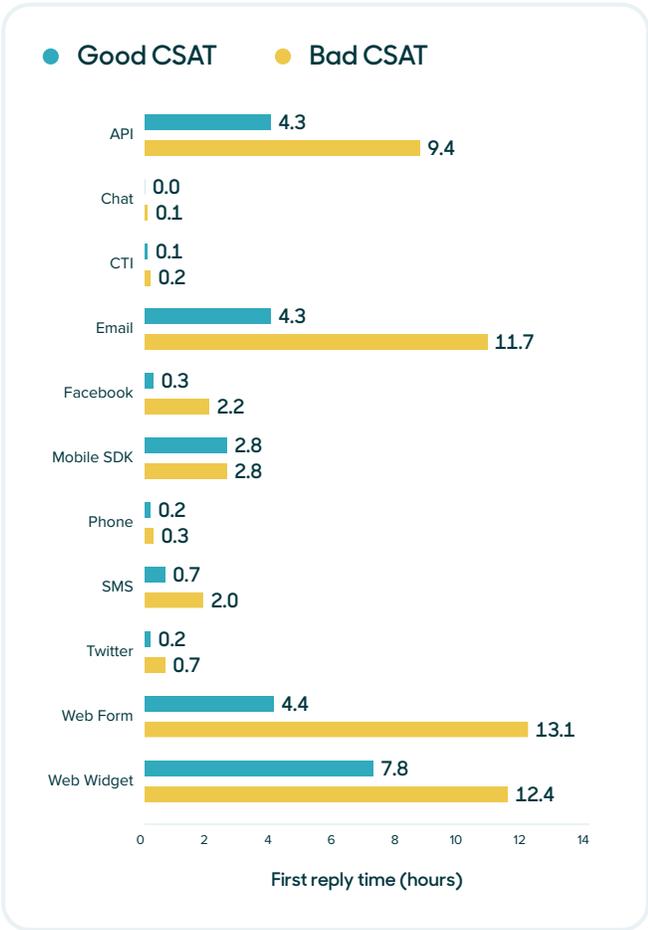
[Integrate phone support](#)

04 Staff channels to meet customer expectations

Customers have specific expectations for good and bad outcomes across channels, and we can approximate the difference in customer expectations for good and bad experiences.

Standard support channels like email and webform still see much longer reply and resolution times, even for support interactions that customers rate as positive.

Staff for omnichannel success



05 Offer the right channel at the right time

Customers value efficiency: 54% say that whether they need an immediate response is the most important factor influencing which contact method they use. Make sure you're always offering your customers' desired channels, which vary based on a customer's location and preferences.

Omnichannel support is perfect for offering seamless service through all channels, allowing your support team to strategically add or deactivate channels as conditions evolve.

It also lets your team connect channels so agents have the right context. In particular, a unified agent workspace means agents are guided by a single record on a customer, giving them visibility into interactions like help center articles viewed and previous contact methods. This leads to more informed agents and customers whose requests get resolved faster.

Create better omnichannel experiences

Stanley Black & Decker's omnichannel success story



Stanley Black & Decker sets the standard for tools and storage solutions. Realizing that customer expectations have evolved over the years, the company began looking for a tool it didn't make: customer service software.

"We had call centers in Turkey, Argentina, Peru, and Brazil, but they weren't integrated into a unified ecosystem," explained Orlando Gadea Ros, a business innovation manager at the company.

Since Gadea had used Zendesk at a previous company, he knew the newly formed support teams needed an omnichannel solution that would offer live chat, phone, email ticketing, and a knowledge base to deflect common questions.

Speed of implementation was crucial since the teams handle an average of 10,000 tickets each month. Within three weeks of signing off on a suite of Zendesk products, the global Stanley Black & Decker support teams were up and running on all channels after only a single day of training.

Efficient workflows have allowed the team perfect adherence to its one-hour first reply time SLA. With faster responses and streamlined processes, customer satisfaction is climbing. The team's benchmark is 85%, and the average is closer to 90%.

Prioritize connected customer data in your support platform:

- 01** Set up your CRM platform to connect customer data and get agents key context.
- 02** Use third-party apps and integrations to simplify IT infrastructure and the agent experience.
- 03** Streamline agent workflows with APIs and custom apps that integrate customer data across systems.
- 04** Adopt agile software with low TCO for reliability and agility.
- 05** Meet your customers where they are by embedding support on your site or mobile app.

01 Set up your CRM platform to keep track of customer data

70% of consumers expect support teams to collaborate so they don't repeat themselves.

Follow these steps to make sure agents have the information they need:

Collect the right data.

Your platform needs to incorporate data for individual customers from multiple sources as your customers interact with your business. Track identifiers for customers, including emails, devices, and other demographic information.

Store complete profiles for each customer.

Data needs to be aggregated into individual profiles that link attributes and demographics to a single record. That way, agents can access this full store of information, and multiple devices can be linked to a customer.

Target messaging to specific segments.

Segment customers using data, and share those segments with other tools, including those for email, ads, and messaging. These tools let you optimize campaigns, A/B test, and provide recommendations to customers.

With Zendesk Sunshine, our new open and flexible CRM platform, companies can connect and understand all their customer data, wherever it may live, and use it across their businesses.

[Break free with Zendesk Sunshine](#)

02 Simplify with third-party apps and integrations

Agents reported that reliability and ease of use are the most important qualities in a customer support solution. Set up agents for success by adding these apps and integrations.

[Get the apps](#)

CRM platform data



Segment

Understand your customers' full interaction history with your business.



Pendo

Learn more about customers' in-app behavior and sentiment.



Stella Connect

See all historical feedback from a given customer.



Oomnitza

Use an IT asset management chatbot to handle employee requests.

Workforce management



Tymeshift

Coordinate time tracking, workforce management, and agent scheduling.

Agent training



Lessonly

Provide training software to help agents learn their craft.

Quality assurance



MaestroQA

Ensure agents supply quality responses.

Customer surveys



SurveyMonkey and SurveyPal

Track KPIs like CSAT and NPS to gauge how your team is doing.



03 Integrate data with APIs and custom apps

Companies that leverage APIs to scale their support operations and integrate data sources have customers who spend 35% less time waiting for agents to respond, and they resolve requests 21% faster while managing more than three times as many tickets as competitors.

Companies can build custom apps easily today with the developer tools your IT organization already knows and loves. Teams using Zendesk take advantage of the [Custom Objects API](#) to define a new object type. A custom object can be just about anything, including products, households, or customer visits, and this information can be easily added to support tickets.

Teams can also use custom objects in integrations or with the Zendesk Apps framework to extend existing Zendesk product functionality.

[Start building custom apps](#)

04 Use software with a low total cost of ownership (TCO)

60% of agents told us the agility and flexibility of their support software is a high priority.

Software with a low TCO saves time and money while being easy to stand up quickly. It also ensures that agents and administrators can focus on delivering the best customer experience rather than being bogged down by clunky, outdated systems, reliance on specialized administrators, and expensive hidden costs.

Businesses should look to optimize their people, tools, and processes. This means empowering agents with an easier-to-use interface and simplified workflows. It also relates to being able to quickly integrate information about your customers, deploy new apps, extend support with tools that connect new data sources, and onboard agents.

[Make support work harder for less](#)

05 Embed channels to make support more accessible

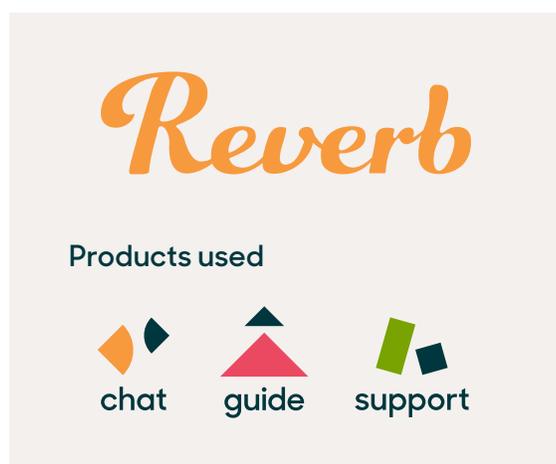
Companies can use Zendesk's Web Widget and Mobile SDK, which are powered by Zendesk Sunshine so your developers don't need to deal with any outdated proprietary technology. Both channels make support easier to access wherever your customers interact with your business, whether it's over self-service, email, or chat.

Quickly integrate customer data and allow your agents to get a single view of how each customer engages with these embedded channels using Zendesk.

Integrating self-service in particular leads to better outcomes. High performers make it easy for customers to self-serve at all touchpoints. 67% of high performers have enabled self-service in their Web Widget or Mobile SDK—compared to only 49% of low performers.

[Deliver seamless support](#)

How Reverb takes a platform approach to personalize support



Since 2013, Reverb has made buying, selling, and learning about musical instruments easier. When Reverb adopted Zendesk in 2015, the company initially used it without customizations.

“We used Zendesk for a long time kind of out of the box,” said Crawford Philleo, manager of customer engagement operations. “Then as we really started to ramp up and scale, it became easy to see that we were going to need to put some extra customization efforts into building out the way we were using it.”

Now serving 10 million users a month, Reverb has needed to rely on a platform to quickly understand each customer by presenting agents with timely and relevant customer information. To do just that, they’ve used the Zendesk API to display customer data from their own systems inside Zendesk.

“We can start putting a lot of that very useful information in front of our agents in a more efficient way: what the status of their account is, what type of payment method they’re trying to use, how many times they’ve visited us on the site before,” Philleo said. This has allowed Reverb to keep providing personal support at scale.

Start engaging proactively with customers:

- 01** Connect data sources to take advantage of real-time information on customer behavior.
- 02** Figure out where customers encounter problems, and address the most common ones.
- 03** Expand proactive engagement to tackle more of the challenges your customers face.
- 04** Test the message to understand how to improve the customer experience.
- 05** Optimize your message over time using the testing framework you've established.

01 Connect data sources to understand customer behavior

Most customers want support teams to keep track of their information, especially when it comes to recent interactions with a company.

Set up your data platform to track important events along the customer journey, and tap into third-party apps and integrations that give support agents the full context on customers.

With Zendesk Connect, you can add data to your support solution either via CSV import or an integration with our API.

[Start integrating data sources](#)

02 Figure out where customers encounter problems

Two-thirds of agents say they're reaching out proactively. But this is likely happening manually, leading to an over-extended support team.

Using the data tracking you've connected, look at where product engagement drops off, agents spend most of their time, and potential revenue is being lost. Try to understand how customers move through onboarding, which requests are most common, and which areas of your business are driving high-value actions like cancellations, product returns, or cart abandonment.

With this information, you can build trigger-based campaigns to communicate with customers at the point when they experience issues.

[Set up triggered campaigns](#)

03 Map messaging to the customer journey

90% of customers agree or are neutral about looking more favorably on companies that reach out to them proactively about issues.

Here are a few examples of events where your team can send targeted messages when customers enter a tricky situation:

- **Onboarding:** A customer created an account but not a profile.
- **New feature announcement:** A loyal customer may be interested in your latest feature.
- **Cart abandonment:** A customer added a product to their cart but did not purchase it.
- **Retention:** A customer canceled their account or subscription.

[Expand how you engage proactively](#)

04 Test your message with a programmatic software solution

Set up goal events, A/B testing, and control groups to understand and iterate on your proactive engagement strategies for sending broadcast or triggered messages.

Building out a robust messaging and testing framework using a software solution frees up agents to handle complicated problems and ensures customers get the responses they need before they even have to reach out to support.

[Build out your testing framework](#)

05 Optimize your message over time

80% of customers are positive or neutral about hearing from companies about their orders, company news, sales, answers to questions, and product usage tips. And research shows that proactive engagement can boost retention over time: A report by Enkata found that taking initiative in your support could increase customer retention rates by 3–5%.

After starting simple, use your testing framework to optimize messaging over time and improve customer loyalty, boost CSAT, and increase sales.

Consumers are most interested in order updates and upcoming sales, but you don't have to stop there. Whether it's a text letting a customer know that their flight is delayed, an email announcing a new clothing line, or a call about a declined credit card, proactive engagement goes above and beyond to strengthen your company's relationship with customers.

[Optimize your strategy](#)

Freshly's proactive support keeps customers engaged



Freshly, a business that delivers healthy meals directly to subscribers, recognizes that proactive customer support can both differentiate its customer experience and grow the business.

Freshly's leadership arrived at that conclusion by questioning the conventional belief that support teams should keep conversations as brief as possible. The company uses Zendesk Connect to reach out automatically to customers during the cancellation process to learn which issues they're facing and how Freshly can help.

At the point of churn, Freshly broke customers into groups according to the reason for cancellation, allowing agents to have richer conversations. Freshly applied findings from these experiments to improve its product and marketing approach.

"Zendesk Connect provides our team with valuable insight into the information customers need and expect from us," said Freshly VP of customer experience Colin Crowley. "As a result, we're able to focus on providing great experiences and strengthening our relationship with Freshly customers, ultimately leading to increased retention."

Let bots handle the easy stuff:

- 01** Build out your team's self-service offerings.
- 02** Make sure you're tracking the right metrics to account for the impact of AI.
- 03** Get started with Answer Bot—it manages repeat requests while agents handle more complex ones.
- 04** Empower agents to create and expand on help center content.
- 05** Incorporate AI-powered self-service into real-time channels like chat, and divert more tickets to AI.

01 Build out your self-service offerings

The first step to using AI successfully is creating a healthy knowledge base. We recommend taking an agile approach that allows you to add knowledge content continually over time.

The top five articles in a company's help center account for about 40% of all daily views. This means you should start with answering the most frequently asked questions and then work your way down to more niche answers. Next, build out categories beginning with the most popular content in each.

Take a look at Zendesk's [About field](#) to see which topics customers are most frequently writing in about, and decide what to cover first.

[Grow your help center](#)

02 Change how you think about metrics

For many organizations, tickets deflected and the time it takes to resolve tickets will remain key metrics, and they are both worth continuing to track.

However, depending on how you are leveraging AI, these metrics may be counterintuitive. For example, increased deflection of low-touch tickets with AI could increase your resolution times as agents spend more time dealing with complex problems.

As customers increasingly self-serve, looking at engagement metrics like bounce rate and pageviews becomes more important. Understanding which self-service content resonates and where there are gaps is more actionable and can provide insight into how agents and your help center can best work together to support customers.

[Learn more about key metrics](#)

03 Power up Answer Bot

20% of agents' time is spent looking up information on customer issues, and 68% of agents feel more satisfied when helping customers with complex issues. AI, when implemented properly, can fill in gaps for customer support teams and make overall operations more efficient.

Start with Answer Bot, a virtual customer assistant that automatically responds to customers' questions using help center articles. Answer Bot manages repeat requests and empowers agents to handle more complex ones. Once a customer creates a ticket, its AI decides which articles are most relevant and presents them to customers.

With the help of deep learning and natural language processing technologies, Answer Bot gets better over time, learning from suggestions that get requests resolved quickly and improving how it offers knowledge content to customers.

[Get started with Answer Bot](#)

04 Make content speak the same language as customers

Support teams can use machine learning to identify the gaps in knowledge content and access suggestions on which articles should be created or updated based on incoming tickets.

Zendesk's AI-powered [Content Cues feature](#) in the Guide Enterprise plan helps content managers align their content with their customers. Content Cues calls attention to the information that customers need by aggregating similar tickets and the language customers use in them.

As a result, Content Cues provides agents with content suggestions based on customers' phrasing in tickets, allowing them to create more relevant articles. It also makes content more accessible with an editing tool that auto-populates searchable tags in an article, letting customers more easily find articles related to topics they're interested in.

[Learn about Content Cues](#)

05 Incorporate AI-powered self-service across channels

Answer Bot customers can now integrate AI across their mobile apps, in a Web Widget, within Slack conversations, and across custom messaging channels with our flexible API.

Integrating Answer Bot across these channels merges the best of both worlds. Customers can get their straightforward, one-touch tickets answered, while more complex issues are automatically escalated to that channel's regular support mechanism.

For example, Answer Bot on Slack responds to questions by starting a thread, providing real-time support in an unobtrusive, transparent manner.

[Extend automated support](#)

Why Dollar Shave Club supercharges support with Answer Bot



Back in 2011, Dollar Shave Club became one of the first direct-to-consumer subscription services, delivering affordable razors to members' doorsteps every month. Since then, Dollar Shave Club has scaled up—way up. In 2016, the company was acquired by Unilever to the tune of \$1 billion.

Rapid growth meant more requests, and the company was looking for a way to automate responses to frequently asked questions. These included: “How do I cancel my account?” or “How do I pause my account?” So they tried Zendesk’s Answer Bot.

“We wanted to deflect these kind of tickets and have more meaningful, consultative conversations with our members,” said Trent Hoerman, Dollar Shave Club’s senior program manager. “So far, every month it resolves anywhere from 12–16% of all tickets that come in.”

One of the most rewarding outcomes is that their CSAT rating has stayed high. “Our survey results indicate that our members like self-service,” Hoerman said. “Our CSAT rating has stayed at around 94–96% since we started using Answer Bot, which is great news for us.”

Another bonus? Dollar Shave Club hasn’t had to increase staff at any location since they began using Answer Bot.

High-quality culture and tools are foundational:

- 01** Create a supportive culture for your agents to keep them happy and motivated.
- 02** Take advantage of an out-of-the-box analytics solution to measure and optimize your team's performance.
- 03** Invest in giving agents the tools to succeed and reduce context-switching.
- 04** Streamline agent workflows to make their lives easier.
- 05** Make sure you're using the right metrics to evaluate your support team and account for agent collaboration.

01 Create a great culture for agents

Over the first four years of an agent's tenure, each additional year of retention averages to a 2.3% boost in CSAT rating across interactions with customers. Here are a few places to start:

- **Set actionable, realistic goals.** Get into the habit of setting achievable daily and weekly goals for your team. Creating objectives means agents understand what's expected of them, as well as what it means to go above and beyond.
- **Be selective about rewards.** Instead of cash or a gamified system for rewarding agents, create guidelines for how often you want members of the team to be recognized and align them with overall goals. Make sure managers recognize achievements, like handling a tough call or collaboration to solve a complex ticket, as they occur.
- **Motivate your team with events.** Offer opportunities to get involved, including travel and outside-the-office activities that allow your team to share, hone new skills, and network.

[Boost your team's culture](#)

02 Take advantage of an out-of-the-box analytics solution

Leaning on analytics yields results. Companies that are most advanced in their use of Zendesk Explore are 44% faster to respond to customers and spend 60% less time keeping customers waiting. Use dashboards to track three kinds of analytics:

Descriptive:

These help you understand trends by tracking metrics that are happening in real time like CSAT, First Reply Time, and Average Handle Time.

Predictive:

Analytics should help forecast outcomes. Zendesk's Satisfaction Prediction, for example, lets your team predict and head off negative customer ratings.

Prescriptive:

Prescriptive analytics are the cutting edge, with AI-powered tools allowing your team to understand outcomes while recommending how they can best be achieved.

[Dig in with Zendesk Explore](#)

03 Invest in giving agents the full context

These are the core workflow and collaboration tools for agents.

[Get the apps](#)

Customer context



Conditional Fields

Customize fields in tickets to give agents and customers a better experience.



Five Most Recent

Get more context on past support requests from a customer.



User Data

Give agents a complete picture of the customer.

Productivity



Notification App

Easily broadcast messages to some or all of your agents.



Pathfinder

Let agents see which articles and community posts customers have viewed.



Time Tracking

Understand customer requests and the time it takes to solve them.

Knowledge & content



Answer Suggestion

Automatically suggest relevant articles, so agents can add them to the ticket.

04 Streamline agent workflows with automations and triggers

In Zendesk, teams use macros to create standard responses to tickets; agents can then apply them as needed. Macros can also be used to update tickets without notifying the requester. For example, you could offer customers a scripted response when your service is offline.

Triggers, which are based on conditions and actions, can automatically modify ticket properties or notify customers. Triggers can be used to update customers when you're out-of-office or automatically route priority customers to a specialized support group.

[Streamline agents' workflows](#)

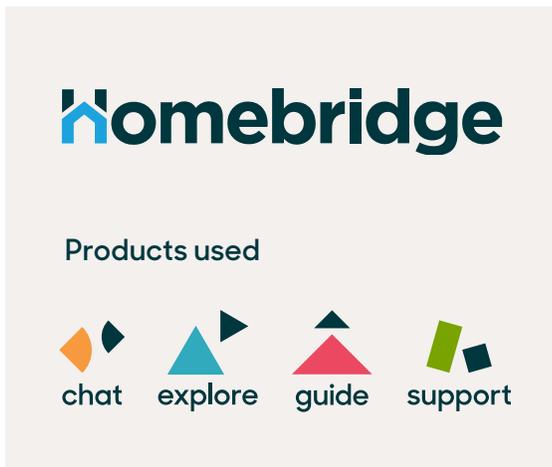
05 Focus on metrics that align with your business goals

This means tracking customer relationship metrics, as well as team performance and efficiency. Collecting feedback via social media and churn surveys is a great way to gauge customer happiness. You can also look at Customer Effort Score (CES) and the percentage of tickets that are handled in a single touch, to focus on effort reduction for customers.

Go beyond transactional metrics to encourage collaboration between agents and account for how agents are helping one another. To do this, make sure you are also tracking agent assists and quantifying how agents work together to improve the performance of the entire team.

[Find the metrics that matter](#)

How Homebridge puts Zendesk to work across teams



One of the largest private mortgage lenders in the United States, Homebridge has 3,000 associates and more than 250 retail branches. It started using Zendesk for customer service and soon after extended Zendesk to nine other departments.

Before turning to Zendesk, Homebridge tried to manage requests via email, an approach that is woefully inadequate for the mortgage process, which requires tracking conversations, documents sent and received, and input from underwriters.

“Everyone was using group email boxes in Outlook, and they were like, ‘There’s gotta be a better way,’” said Ben Chapman, director of client-facing experience and analytics at Homebridge.

As Chapman brought in Homebridge teams one-by-one, word about Zendesk spread, with everyone from account executives to partners giving it positive reviews. Now Homebridge’s Marketing, HR, Compliance, Operations, and Customer Success departments across their brands use Zendesk Support, Guide, and Chat to process customer requests via phone, email, chat, and to offer self-service. Even the human resources department uses the platform.

The improved visibility, as well as Homebridge’s reliance on real-time analytics, has helped the company close loans faster. “Zendesk Explore helps us monitor and analyze where there might be gaps, where employees might be lagging behind for one reason or another so we can improve performance,” Chapman said.

Follow the data

[Learn more](#) about the top trends in customer support and understand how your team stacks up.