

THE DIGITAL TIPPING POINT

How mid-to-large-sized businesses can accelerate CX success in 2021



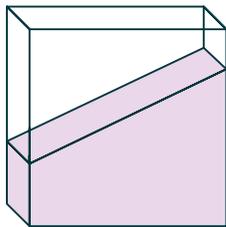
THE DIGITAL TIPPING POINT

Forget multi-year plans for digital transition—the time to act is now.

In 2020, companies made seismic shifts in how they do business as the impacts of COVID-19 transformed customer expectations and workplace dynamics, virtually overnight. Being digital-first and, in many cases, digital-only meant companies had to rapidly acquire new technologies to reach customers and connect remote teams.

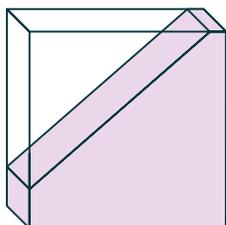
57%

of mid-sized companies anticipate having more to invest in CX technology in 2021



65%

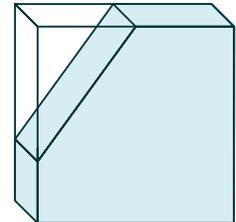
of enterprise companies anticipate having more to invest in CX technology in 2021



According to Zendesk's 2021 Customer Experience Trends Report

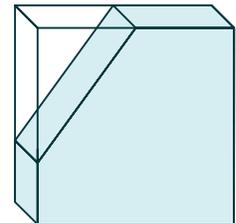
89%

of leaders at mid-sized companies (businesses with 100-999 employees) say COVID sped up technology adoption



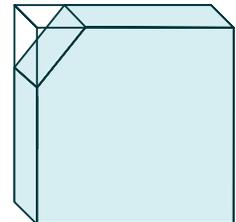
91%

of leaders at enterprise businesses (businesses with over 1000 employees) say COVID-19 sped up technology adoption



98%

of mid-to-large-sized companies implemented new tools or processes



Those who prioritized CX before the pandemic already have an advantage. More mature CX organizations are more than six times as likely to exceed customer retention goals. And while companies must work within their resources to adopt new technologies and processes, there's a risk of falling behind higher-performing peers as customer expectations rise.

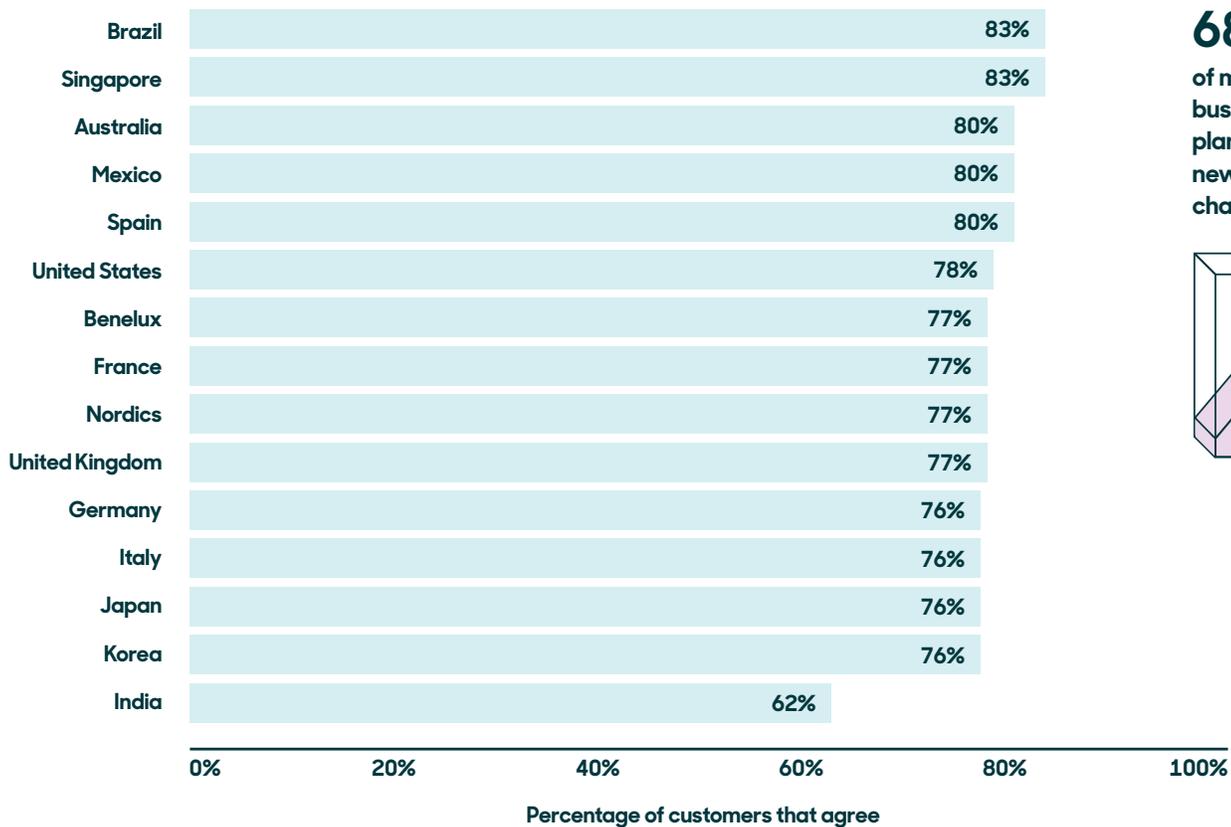
Luckily, most anticipate having more budget flexibility in 2021.

Investing in your customers pays off, but what to prioritize can be a little tricky. To help guide the way, our team of experts reviewed data from businesses using Zendesk worldwide. Here are 8 best practices for delivering winning CX—and the time to act on them is now.

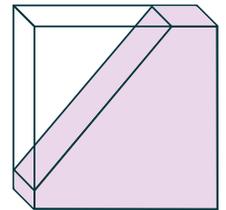
01 Make things easy for customers

PRIORITY #

Customers haven't become more forgiving despite the pandemic—80% will go to a competitor after more than one bad customer service experience.

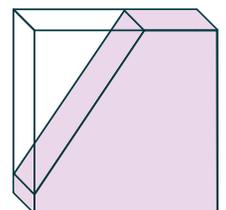


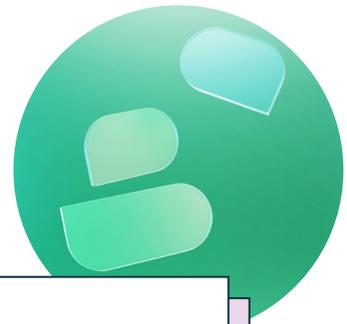
68%
of mid-sized businesses plan to add a new support channel in 2021



In 2021, customers expect effortless online experiences that are on par with, or better than, in-person experiences. And companies are listening. Most businesses plan to adopt new channels in 2021, and many are investing in self-service so customers can find quick answers without even having to speak to an agent.

76%
of enterprise businesses plan to add a new support channel in 2021





BEST PRACTICE 01:

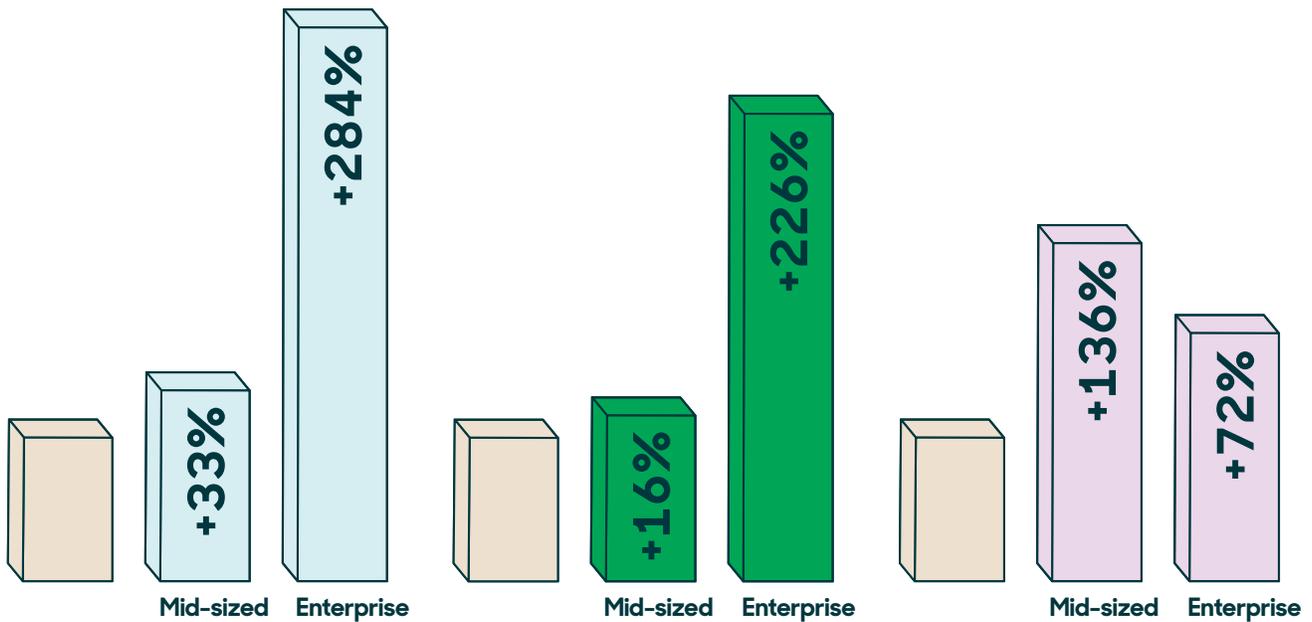
Meet customers where they are

Customers expect brands to meet them where they are—customers shouldn't have to climb a ladder to reach support. And where they are is on messaging channels, like Facebook Messenger and WhatsApp.

Teams with leading CX results are at least 1.5 times more likely to use messaging

- WhatsApp
- SMS/text
- Facebook Messenger/Twitter DMs

Companies saw messaging requests double in 2020



With support that's fast, personal, convenient, and secure, customers can get answers over the same channels they use with friends and family. Messaging also provides more flexibility for both customers and businesses because conversations can happen in real-time or asynchronously. In other words, customers can start, stop, and continue the conversation when it's convenient for them, without losing conversation history. That means customers can troubleshoot while they take care of other things like walking the dog or running a Zoom meeting, and agents can help more customers at once.

BEST PRACTICE 02:

Help customers get answers faster with self-service

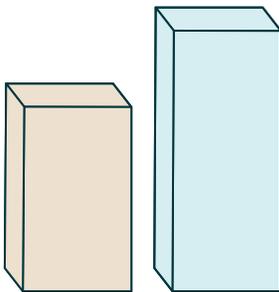
When customers want to get in touch, they want convenient options. But for simple questions, they just want quick answers. That's why customers prefer to help themselves and rely on companies' online resources more in our digital-first world.



High performing mid-sized businesses were 34% more likely to add self-service resources in 2020 and 4x more likely to use Zendesk's Answer Bot

37%

increase in knowledge base views from customers since COVID



Empowering customers to self-serve also saves agents time from answering repetitive requests. And teams can get even greater value from self-service when they pair it with AI. An AI-powered bot, like [Zendesk's own](#), can recommend help center articles to empower customers to self-serve throughout the entire customer journey, such as on your checkout page. Bots are also "always-on," so customers get answers 24/7.

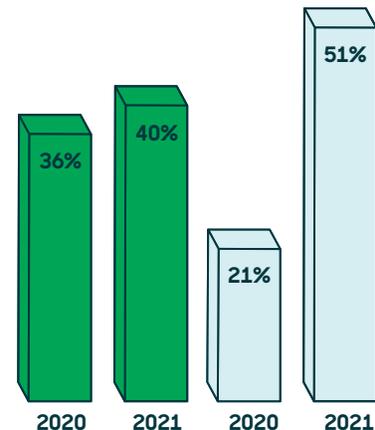
Though AI saw adoption rates jump 50% in 2020, usage rates remain low. This gap presents an opportunity for businesses to make AI a better partner to agents. With Zendesk's Bot APIs, support teams can integrate their CX software with various chatbot solutions like [Ada](#) so agents and bots can work seamlessly together.



High performing enterprise companies were 35% more likely to add self-service resources and 3x more likely to use Answer Bot

● Mid-sized ○ Enterprise

AI remains an underutilized tool, despite adoption boost among larger firms



02

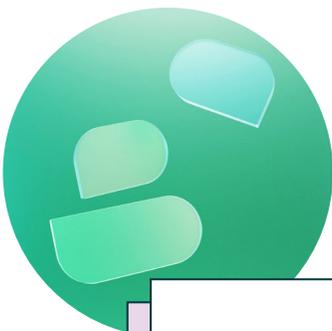
PRIORITY #

Support your support team

While companies have been expanding their online channels to reach customers, they've also faced the challenge of transitioning to remote work.

With companies learning to work in new and flexible ways, they'll need to become laser-focused on the employee experience (EX). Good CX and good EX are like peanut butter and jelly: they're inextricably linked. Yet agents feel overwhelmed.

Meeting customers on their preferred channels is only one part of providing effective support. Equipping teams with tools to do their jobs well—regardless of how a customer reaches out—is crucial to good customer service.



71% of agents at mid-sized companies and 69% at enterprise companies feel overwhelmed



Only 59% of agents at mid-sized companies and 56% at enterprise companies believe they have tools to succeed in this new world



BEST PRACTICE 03:

Bring it all together with one view for agents

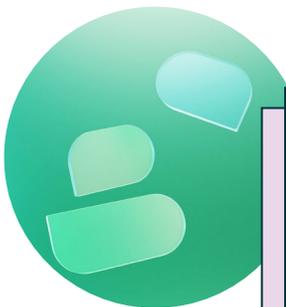
In 2020, larger companies experienced the highest ticket volatility of organizations of any size. Their agents need a unified workspace that connects all their channels, tools, and customer context to provide quick and personalized support at scale.

With 40% of customers using multiple channels for the same issue, agents need to be able to seamlessly shift between channels without losing customer context. This ensures customers don't have to repeat information they already addressed or wait on hold while agents search for the details each time they change channels.

**High-performing
mid-sized teams are
93% more likely to
have agents working
across channels**

For example, if Tara texts Cool Kitchen to return a blender, agents should have visibility into:

- ❖ **If she reached out about issues with the blender before, even if it was over different channels**
- ❖ **Her contact information, such as her email to send her a receipt**
- ❖ **How long she's been a customer (perhaps loyal customers get free returns)**
- ❖ **Her billing, shipping, and order details—Cool Kitchen might integrate its CX solution with Shopify so agents have this information in front of them and can help Tara return her blender inside their workspace**



**High-performing
enterprise teams
have 3 times more
agents working across
multiple channels**

BEST PRACTICE 04:

Empower agents with workflows that promote efficiency and collaboration

Companies, especially smaller ones, are investing in tools that promote efficiency and collaboration across teams and departments.

Continuous change means agents must be efficient. The onus is on businesses to arm them with tools to work smarter. Organizations can improve agents' workflows by:

- Equipping agents with prepared answers, so they don't have to type out your reimbursement policy
- Automatically routing issues to agents with the right skills
- Capturing preliminary details from customers with a bot

Collaboration tools have had to scale up in our always-on, always-connected world. Higher-performing teams use workflow features to ensure agents have a process for working together and the tools and data needed to realize it. Businesses can enable agents to have conversations with each other inside tickets. And with tools like Slack and Zoom inside their workspace and robust permissioning around who can access what, agents can collaborate with each other, other departments, and even third parties.



High-performing mid-sized teams are 35% more likely to have added to or adjusted workflows in 2020. High-performing enterprise teams are a third more likely

BEST PRACTICE 05:

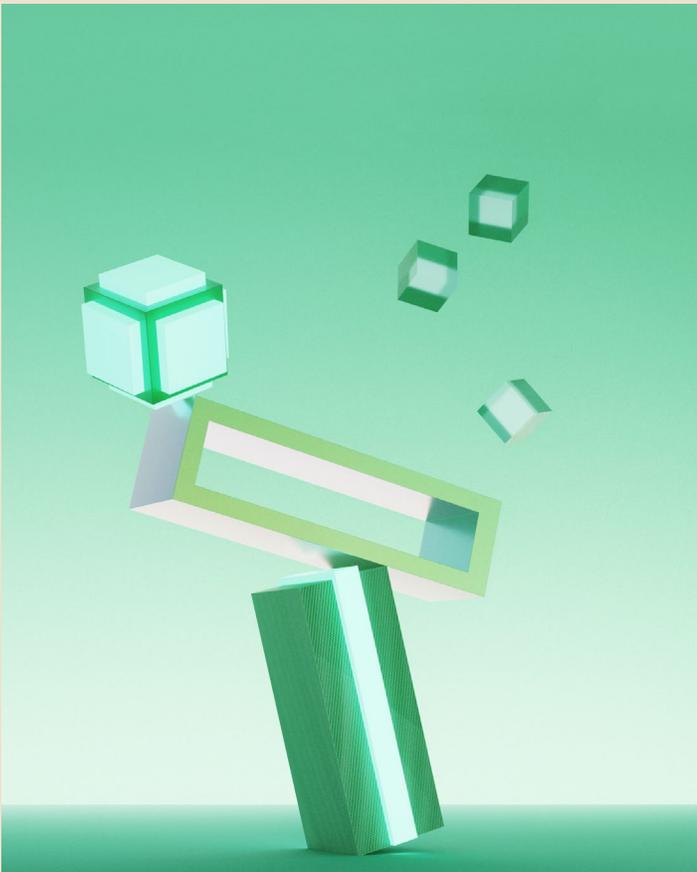
Scale self-service with help from agents

Good knowledge management doesn't just empower customers to find answers faster, it also helps agents find critical information quickly. Those same agents are your best resource for growing your knowledge base and keeping content fresh to make it ever more valuable. Yet, many agents still can't contribute to knowledge.

Businesses can build knowledge management into agents' workflows. [Knowledge management tools](#) enable agents to create new articles while answering tickets, and [AI-powered suggestions](#) automate knowledge management hygiene.



Leading teams are 37% more likely to enable features allowing agents to contribute knowledge



03

Keep your business in sync

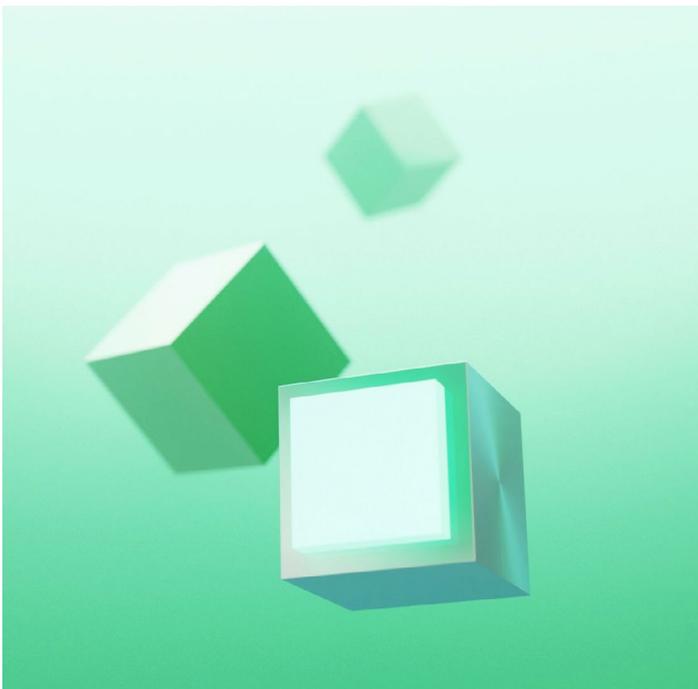
PRIORITY #

With the pandemic accelerating adoption of digital tools, keeping your business in sync is no easy feat.

Keeping the organization in sync means bringing data between people, tools, and software together, not leaving it scattered and siloed. That's why legacy CRM systems no longer work; companies today need a CRM platform that's open and flexible, and can connect the data dots across many sources. This enables businesses to be agile, empowering them to go beyond capturing data and focus on understanding and reacting to it instead. And agility is a top priority for them this year.



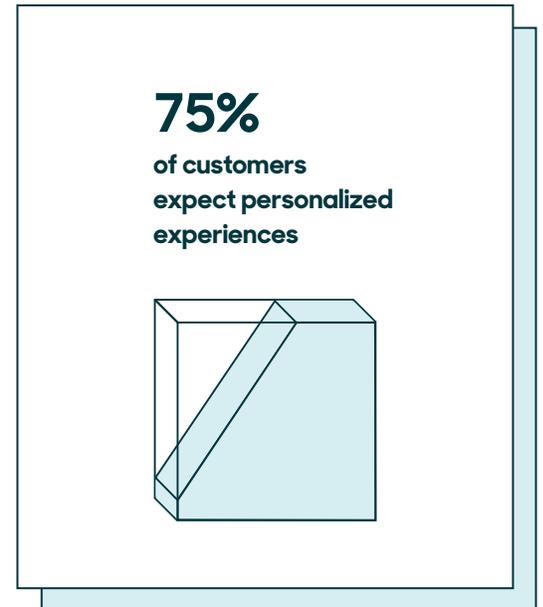
**Improving agility
is a top priority
for over half
of businesses**



BEST PRACTICE 06:

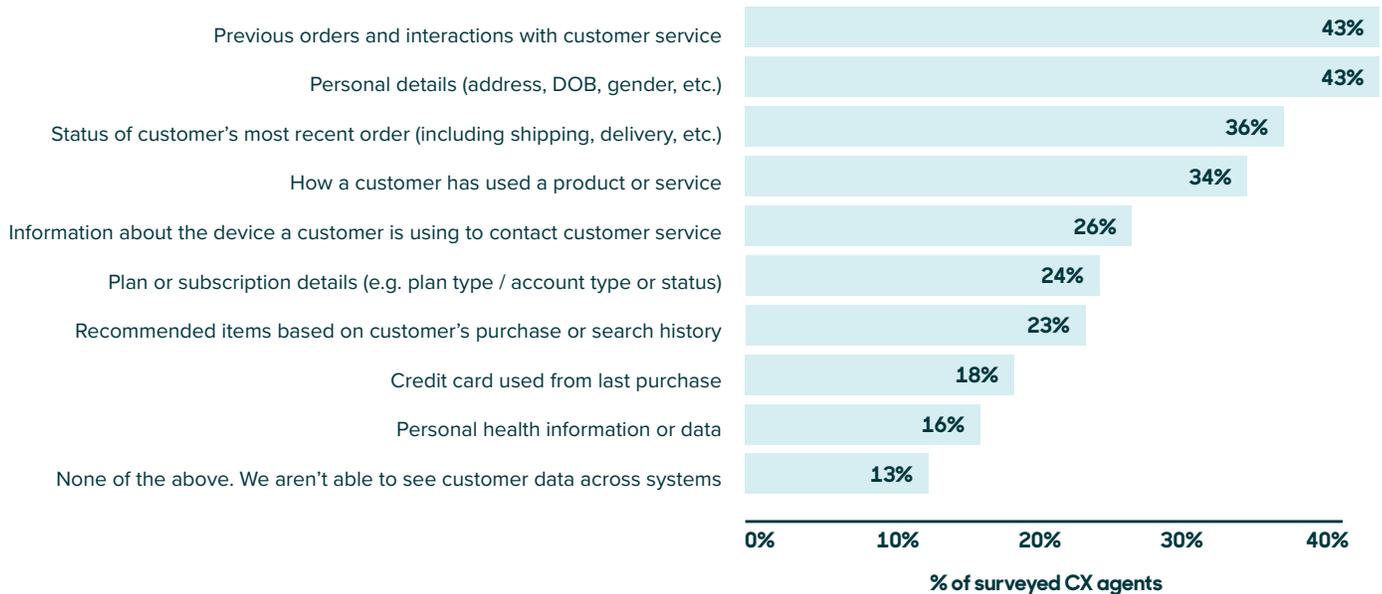
Personalize CX with a unified customer view

Relationships are critical during times of crisis. Despite having many customers, bigger businesses need insight into each of them. But at large companies with sprawling customer bases, customers often feel like another ticket in the queue. That's because many agents can't access customer data to personalize interactions.



Most agents at companies of all sizes don't have access to customer data

Which types of customer data are you typically able to access across systems to answer customer requests?



To deliver personalized experiences that build trust on the front-end, businesses must manage and interpret customer data on the back-end. This means creating a unified customer view, one that connects customer data wherever it lives, whether it be first-party or third-party.

And of course, as companies leverage more data and remote work continues, information security is critical. Security management is a high priority for 80% of tech decision-makers in 2021. Businesses today need a CX platform with enterprise-class security features and comprehensive audits, and that complies with industry-accepted general security and privacy frameworks.

BEST PRACTICE 07:

Extend your CX solution with apps, integrations, and automation

You want your CX solution to work in sync with all the tools and applications your team depends on, so agents have the up-to-date information they need in front of them. Companies today no longer need to have just one platform to get a unified view of their customer's journey and their data. Tools like [Workato](#) enable businesses to sync data between cloud-based applications throughout their organization to get the benefits of best-of-breed tools while eliminating silos.

[Zendesk's Marketplace](#) gives teams access to over a thousand plug and play apps and pre-built integrations—from workforce management technology like [Playvox WFM](#) and project management apps like [Atlassian](#) to translation software like [Unbabel](#) and customizable survey tools like [SurveyMonkey](#). Open and flexible technology also ensures organizations can extend their agents' workspace with custom apps. Indeed, 68% of mid-sized companies and 73% of enterprise companies report having access to developers to customize their CX solution.

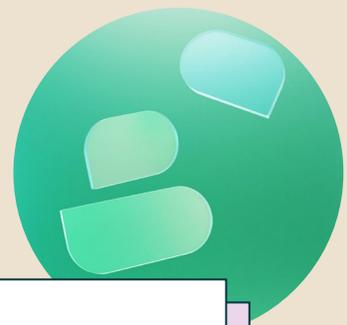
With a treasure trove of customer insights at their fingertips, agents can anticipate customers' needs and further personalize service. Being able to access data across all those tools from one location also goes a long way toward improving efficiency. It streamlines agents' workflows, using data to automate processes and transform time-consuming retrieval processes into a one-click step. And for larger businesses, automation is a must.



High-performing teams are 33% more likely to extend their CX solution with apps and integrations



High-performing teams use more than twice as many tools to improve agent workflows and automate tasks



BEST PRACTICE 08:

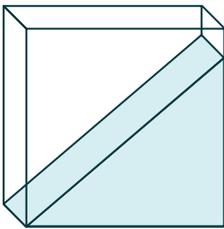
Learn how to improve with analytics

Keeping your business in sync also means integrating analytics from every channel so you can measure and improve the entire customer experience—from identifying areas of development for your team to understanding how customers interact with you. Yet 38% of managers at mid-sized companies, and a third at enterprise companies don't have the right analytics tools to measure success for remote teams.

High-performing teams are over 40% more likely to use an analytics reporting solution for CX

38%

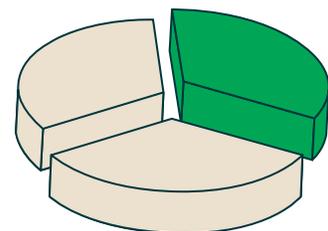
of managers at mid-sized companies don't have the right analytics tools to measure success for remote teams



To keep up in a pivot-quickly world, CX organizations need analytics software that gives them instant access to insights they can act on. With real-time and historical [analytics built inside](#) their CX solution, support teams can take action on what's happening at the moment and understand past trends—no statistics degree required.

1/3

of managers at enterprise companies don't have the right analytics tools to measure success for remote teams



Which side of the tipping point will your business be on?

Making things easy for customers, supporting your support team, and keeping your business in sync are the three keys to delivering great CX in the next-normal. Businesses can't choose just one of the three, focusing on one area and putting the others off until later. Prioritizing all three is essential—and it's actually quite difficult to be good at one without investing in the others.

The Zendesk Suite provides the complete customer service solution that's easy to use and scales with your business. Learn more about how Zendesk can help ensure you're on the right side of the CX tipping point.

Get started here:
[sign up for a free trial today](#)

