zendesk
talk

Getting started with Zendesk Talk

Contents

Introduction

Even in the age of email, social media, and whatever new channel is just around the corner, customers still prefer to use the phone for communicating with companies. Whether it's to resolve complex support issues or to receive personalized service, many people appreciate companies that make the investment in providing quality support over the phone.

Zendesk Talk is cloud-based call center software that helps companies provide more personal, productive phone support. It's built right into the Zendesk multichannel support ticketing solution, allowing teams to deliver phone support from the same platform they use to manage all other customer conversations. Easy to set up and use, Zendesk Talk helps organizations boost agent productivity, improve cross-channel reporting, reduce costs, and—most importantly—improve the customer experience.

This ebook is designed to help you successfully implement Zendesk Talk. It includes high-level guidance, as well as best practice tips, to ensure you and your team can provide—and continue to improve—great phone support for your customers.

CHAPTER ONE

Goals and Strategy

Your Zendesk Talk setup strategy will vary based on your organization's goals. A team with dozens of phone support agents, for example, will have different business goals than a small startup introducing phone support for the first time.

After talking to lots of Zendesk customers, we've found that the majority of their goals fit into three main categories: (1) introducing phone support; (2) boosting customer satisfaction; and, (3) improving operational efficiencies. These goals certainly aren't mutually exclusive, but honing in on your team's primary goals will help you and your team prioritize decisions about setup, staffing, and key metrics.

GOAL 1: INTRODUCING PHONE SUPPORT

We talk to lots of companies that start with email only support, but eventually find that it's important to provide their customers with a way to contact them over the phone. In fact, we spoke with one fast-growing e-commerce company with resourceful customers so eager to speak with someone for support that they uncovered the CEO's cell phone number on a financial filing and published it online for others to call.

If your goal is to introduce phone support in a way that's minimally disruptive to your current support operations, here are a few tips:

Introduce your phone number gradually

Displaying a phone number prominently on your website can increase credibility with customers and assure them that help is just a phone call away, but it might be better to slowly "ease into" phone support by strategically sharing your phone number. DonorsChoose.org, a leading nonprofit, first started out with phone support by sharing their support line only with their high-value donors. You can also put a support number on the specific sections of your help center that cover subjects you know customers may need to talk through.

GETTING STARTED WITH PHONE SUPPORT: DONORSCHOOSE.ORG

DonorsChoose.org

DonorsChoose, a leading nonprofit that allows individual donors to contribute directly to teachers in high-need communities, initially used Zendesk to support contributors and teachers only via email. After noticing that many members of their community were eager to speak directly with a DonorsChoose employee, they introduced Zendesk Talk for phone support, starting with their high-value donors.

Now, they are able to assist high-value donors and nurture projects in new regions, while maintaining their commitment to organizational transparency and efficiency.

Use an IVR to deflect FAQs

Well-designed interactive voice responses (IVR) menus (also known as "phone trees") not only make your business feel more established, but can also provide recordings to deflect common questions. If you know that many customers call in to ask for opening hours, a pre-recorded greeting at the start of the IVR will allow your customers to "self-serve" on the phone, saving them (and your agents) time.

Create a voicemail inbox

If you don't yet have a large enough team to support a full call center, you can use Zendesk Talk as a voicemail inbox. All voicemails automatically create tickets, making it easy to keep track and divvy up among agents for follow-up. With optional voicemail transcription, you can see at a glance why a customer has called. Plus, you can create triggers based on words in the voicemail transcription, which could, for example, automatically assign any voicemail with the word "refund" to the agents in the refunds group. Agents can follow up on voicemails with either an outbound phone call, email, or even text message.

GOAL 2: BOOSTING CUSTOMER SATISFACTION

Research continually shows that the phone channel results in higher customer satisfaction—it's not surprising, given the immediacy and personal touch of a call. That said, if your primary goal is to improve customer service, it's not enough to just provide a phone number to call. You have to make sure to strategically design your phone support operations in a way that minimizes the major sources of customer frustration.

Staff enough agents to field inbound calls

Customers hate waiting on the phone to talk to an agent. If customer satisfaction is your team's primary goal, then you need to ensure that you have enough staff members to meet your customers' phone support demands. For those unpredictable spikes in call volume, limit call queues and provide customers the option to exit a long queue and leave a voicemail.

Empower agents to make outbound calls

If you know that you are more likely to achieve positive satisfaction with a phone call, encourage your agents to respond to frustrated customer emails with a phone call. Not only will your customers appreciate the proactive, personalized approach, your agents may find that it's faster and easier than crafting a long email response, especially for complicated issues.

Measure satisfaction

If boosting customer satisfaction is your main goal, make sure that it's your primary key performance indicator. Your agents don't have to challenge the Zappos eight-hour phone support call record, but if you measure agent performance based on call length rather than customer satisfaction, it'll be difficult for your team to fully resolve your customers' issues.

To solicit customer satisfaction using Zendesk Talk, send follow-up emails after each call. Not only will you be able to understand what's working well when your agents help customers over the phone, but you'll be able to compare CSAT scores across all your other channels.

If boosting customer satisfaction is your main goal, make sure that it's your primary key performance indicator.

“Using Talk helps us constantly improve our customer service.”

BETTER SUPPORT WITH ZENDESK TALK: BRAYOLA

Brayola is an online marketplace that matches women with the perfect bra by allowing them to share the details of their favorite bras with each other privately. For their team, phone support is strategically important—for both the satisfaction it provides customers and the insights it provides the company.

“Nine times out of ten, if there’s a problem it’s better to have a personal interaction with the customer,” Fiona Adams, Brayola’s Director of Communications and Customer Service, said. “When you hear a voice at the other end of the line that genuinely wants to help you, it takes the edge off of the frustration and gives us a chance to explain the process.”

With Zendesk Talk, agents can see at a glance if a caller has any other tickets, and if they are open or closed. Plus, dashboards show how many calls the team is handling, how many people are on hold, and how many have hung up before the team could respond, revealing where the team is performing well and where it can do better. Automatic call recording provides further opportunity for analyzing which approaches are most effective, and for coaching both old and new team members on the best way to handle different issues.

“Using Talk helps us constantly improve our customer service.” Abrams said.

GOAL 3: IMPROVING OPERATIONAL EFFICIENCIES

Although we hate to think about compromising the customer experience to minimize costs, sometimes the reality is that teams are trying to do more with less. The good news is that by moving to Zendesk Talk you're already taking a big step towards saving your team time and money. Zendesk Talk is much less expensive than traditional call center solutions and allows agents to be more efficient by managing all their channels in one place. Here are a few tips to keep in mind as your team sets out to reduce your phone support overhead with Zendesk Talk:

Put information at the agent's fingertips

The time that agents spend looking for information to help their customers adds up. Upload your customer phone numbers into Zendesk Support (details here) so that agents know exactly who is calling and can see any prior communication with that customer. When known customers call, the automatic screen pop-up includes vital customer information, so agents don't need to spend time identifying the caller or asking repetitive questions. Plus, use your Zendesk internal knowledge base or other helpful apps that make it easy for your agents to get access to the customer, product, or troubleshooting information without making callers wait.

MANAGING A REMOTE TEAM: GETAROUND

Getaround is an on-demand car sharing community, creatively tackling the very real problem of car overpopulation. Since 2010, they've launched car sharing in five major U.S. cities, and expansion at this speed has required their Customer Happiness team to scale in step. Given the risk and liability involved in driving, and considering the physical value of a car, phone support is essential to their success.

With Zendesk Talk, the Getaround team can quickly onboard new agents to their call center in the Philippines, without investing in any additional equipment. Agents only need their laptops to start helping out customers over the phone.

Streamline routing

Routing callers to the wrong agent takes up valuable time—receiving agents will spend time on the phone with a customer, even though they may not be equipped to help them. A well-designed IVR routing system, or phone tree, will allow callers to select who they need to speak to, so they are connected to the correct agent on the first call. We provide more information for designing effective IVR trees later in the ebook.

Train and support your team

They'll help you improve first call resolution, decrease handle time, and increase customer satisfaction. We'll teach you more about hiring, training, and coaching agents in the section on "Staffing and training agents".

Consider remote agents

If your team is looking for ways to decrease costs, you might consider hiring remote agents, which can reduce staffing and infrastructure costs. Because there is no specific equipment required to use Zendesk Talk, agents can get started anywhere in the world. Plus, real-time dashboards make it easy for you to keep tabs on agent performance, even if they aren't in the same office.

Confident and well-trained agents are the best resource for delivering efficient phone support.

CHAPTER TWO

Environment and System Requirements

You've established your team's main goals for phone support and are ready to get started. But before you dive into recording your call greetings and testing out your new Zendesk Talk line, there are a few things you need to check to be sure your team's environment is properly set up for your new VoIP solution.

Zendesk Talk is a VoIP solution, which allows you to make voice calls using a broadband internet connection instead of a regular (or analog) phone line. VoIP solutions are flexible, customizable, and generally more cost-effective than traditional phone lines.

A call over Talk requires at least 80 kbps per session, and we recommend 500 kbps to provide leeway for other network connectivity needs.

Here are five easy steps that you (or whoever manages your network and IT) will need to follow before you get started:

Check your connection and bandwidth

First things first: you'll need a strong and stable Internet connection. Wireless network connections can work, but a hardwired connection to your network will provide optimal results. A call over Talk requires at least 80 kbps (kilobits per second) per session, and we recommend 500 kbps to provide leeway for other network connectivity needs. Concurrent network activity, like streaming media or transferring files, can impact call quality, so a dedicated network for your calls will provide best results.

Configure your router with open ports and QoS (quality of service) enabled

Make sure your router has the required ports open. With your router's QoS, prioritize these ports or the IP address of the computer(s) making and receiving calls. Two different ports are required to meet two different needs (learn more here):

- Transmission control protocol (TCP) for call initiation
- User datagram protocol (UDP) for the audio component of the call

Open the correct ports in your computer's firewall

Mac and Windows operating systems might have system firewalls enabled that block the same ports required for Zendesk Talk. Make sure to allow incoming connections for Chrome or Firefox. Here's a quick tutorial.

Use a recently updated Chrome or Firefox browser

Speaking of web browsers, for best results, use a recently updated version of Chrome or Firefox. New features built on the Twilio framework (or Zendesk as a whole) are dependent on the browser's feature set, and some features may not be available in earlier versions of a browser. Additionally, older versions of browsers may have bugs that would impact call quality.

Enable wired headsets in your browser

We recommend wired headsets that connect to the 3.5mm audio port on your computer, or USB headsets. They're reliable and don't require batteries. Bluetooth headsets can result in broken streams of audio, and wireless can cause dropouts. The one downside of wired headsets is it can lead to an agent's workstation becoming a tangled mess of wires. Plastic zip or velcro ties are cheap and will help maintain some order. Our own support team at Zendesk has specific headset recommendations—you can find them in our Community here.

CHAPTER THREE

Phone Numbers

It seems obvious enough: to use Zendesk Talk, you'll need a phone number. You may already have one that your customers call for support, or you might be choosing your very first one. In either case, here are a few things to consider.

IF YOUR ORGANIZATION DOESN'T YET HAVE A PHONE NUMBER

Zendesk Talk offers phone numbers for 40+ countries, including toll-free, local and national numbers. Here is a full list of number types and countries.

There are several factors to consider when choosing a new number:

Where are my customers?

Answering this question will provide clarity around the toll-free vs. local number debate.

A global or even national customer base might be better served by a toll-free number. Offering toll-free numbers can signal to your customers that you're committed to providing great phone service and not expecting them to pay for it. Plus, it provides the opportunity to snag a vanity phone number that is easy to remember and indicative of your brand.

A local number might make more sense if customers are calling from one or more specific locations. In addition to costing less than a toll-free number, a local number is just that: local. It might help build a human connection between you and your customers.

How many phone numbers do I need?

This will vary business to business. You might find that customers living in specific, high-concentration areas prefer local numbers, in which case you would provide a local phone number for each. However for customers who live outside of those areas, it might make sense to also provide a toll-free number.

THE BENEFITS OF LOCAL PHONE NUMBERS: TAQUILLA

Zendesk Talk customer Taquilla, a Brazilian online shoes retailer based in Belo Horizonte, wants their customers nationwide to know that their service team is readily available. They decided to offer local phone numbers for the states of São Paulo, Rio de Janeiro, Parana and Distrito Federal. It is less expensive for their customers to call local numbers, and gives the impression that the small retailer is accessible nationwide.

The ease of contact—plus the reassuring sense of proximity—helped Taquilla boost revenue by 50%. Zendesk Talk not only makes it easy for their agents to manage these multiple phone numbers, but the lower price point and increased agent productivity helped the team reduce telephony costs by 30%.

In addition to locale, you might want to consider offering multiple phone numbers for different types of customers or service issues. It might make sense to provide your most important customers with a phone number that will escalate them to a special group of agents. The "Measuring and Improving" section of this ebook provides insight into how to determine if this is even necessary.

IF YOUR ORGANIZATION DOES HAVE A PHONE NUMBER

You have two options for using your existing phone number with Zendesk Talk: porting or forwarding.

Porting

Zendesk supports "porting" (moving a phone number from an existing provider to Zendesk Talk) for a number of countries (see a full list here). Be sure to budget four weeks for the number porting process in the US, longer in other countries. This support article on porting numbers into Zendesk Talk provides the details you need.

Porting your number in five easy steps:

1. Get up and running on a new Zendesk Talk phone number.

2. When you are ready, forward calls from your existing number to your new Zendesk Talk number.

3. Submit your port request to Zendesk support and your existing provider.

4. When notified, configure your existing number in Talk before it ports.

You're done! Seamless transition.

Forwarding calls to Zendesk Talk

You may work with your existing provider to forward any call to an existing phone number to your Zendesk Talk number. This allows organizations with phone numbers in countries where we don't yet support porting to continue using their existing phone numbers. If you do decide to forward calls, be sure to check with your existing provider about passing inbound caller ID to your Zendesk Talk number.

PHASING OUT AN EXISTING PHONE NUMBER

So you've got a fresh new Zendesk Talk number that you'd like to use instead of your old one—we don't blame you! Sometimes it's nice to have something new. But replacing a phone number can be a tricky prospect. Here are some tips to make things run a little smoother:

Communicate, communicate, communicate

Use the tools at your disposal to communicate—as early as possible—that you are changing your phone number. Use email blasts, social media posts, and any other communication channels to make sure your customers, partners, and employees are aware of the new number and when the change is taking place.

Update everything

Update your website to reflect the new number and be sure to do a local search of the old number, because it might be hiding in places you don't expect. All of

Implement the new number while the old number is still in service.

the PDFs of ebooks, case studies, white papers, etc.? They'll need to be updated too. Crowd source this question: Where else do we share our phone numbers? Business cards, social media profiles, and phone directories all need to be updated.

Create some buffer

If possible, implement the new number while the old number is still in service. This will prevent customers who use the old number from falling through the cracks, and will also provide the opportunity to give them the new number.

CHAPTER FOUR

Routing, greetings, and queues

Now that you've clarified what numbers your customers will call to reach you, you can design the experience they'll have once they place a call—the greetings they'll hear, how long they might wait, and where they'll get routed for help. Zendesk Talk makes it really easy to fully customize your phone support operations, no matter the size or complexity.

CREATING AN INTERACTIVE VOICE RESPONSE PHONE TREE

An IVR is essential for any large company to scale quality customer service. When used correctly, it can provide answers to FAQs without straining support agents, and, when agents are needed, route customers to the correct agent, limiting wait times and transfer.

However, the fact remains that customers are easily frustrated with IVRs, with as many as 11% hanging up when encountering them. It's important to be thoughtful when creating an IVR, to put the customer first, and to take efforts to improve over time. Here are some best practices to help get you started:

Remember who you are

First and foremost, an IVR, just like an advertisement or tradeshow booth, is a public-facing extension of your brand. Keep that in mind when considering everything from the way you organize the IVR to how you record messages (see the greetings section for more information).

Keep things simple and quick

According to a recent study, 75% of consumers "agreed" or "strongly agreed" that IVRs forced them to listen to irrelevant options. We recommend limiting the number of IVR options—no more than 5 is best.

Deflect FAQs and allow for self-service

Limit call volumes and save your agents (and customers) time with greetings that provide answers for simple questions, such as how to reset a password or find information about a shipped item. Use

90%

of consumers want to speak to a live agent.

tags in Zendesk Support to identify the common questions that drive a high volume of calls so you can satisfy a high volume of customer inquiries without the help of a live agent.

Let them talk to a human

While an IVR can mitigate the strain on your support agents, it's by no means meant to replace them. Many customers have problems that require speaking to an agent, and many more simply prefer it—in fact, at the beginning of a customer service experience, 90% of consumers want to speak to a live agent. Don't intentionally hide this option through an overly complex phone tree—we don't recommend having an IVR menu with more than 2 or 3 levels.

Never stop improving

There's no such thing as a perfect IVR, so it's important to monitor important metrics like average wait times and abandoned call rate, and look for ways to improve. Support managers should meet regularly, particularly when first launching a new IVR to monitor performance. Too many abandoned calls? That might indicate an overly complex IVR. Wait times too high? You might need to highlight more self-service options, lightening the strain on live agents. The point is, identify the problem, make a hypothesis about the cause, and experiment with solutions until you see an improvement. And, of course, the best way to learn how your IVR works is to ask your customers—or, better yet, ask to watch them as they navigate through your IVR options.

Learn how to set up your IVR menu here.

Defining and refining agent groups for your IVR

Your customers call for different reasons. Some need technical support. Others customer service. Still others need sales. With your IVR, customers can choose the agent group they'd like to reach. Create agent groups based on different functions or skills, like specific departments (billing or shipping) or language (English speaking and Spanish speaking).

Tag phone tickets by type of issue (technical support, sales, customer success, etc.) to learn if you need more granular distinctions to improve call routing and limit transfers.

MANAGING GREETINGS

Your support line greetings are an extension of your brand and an opportunity to communicate your company's personality. Keep in mind your company's overall "voice" as you write and record your IVR greetings, including:

Main greeting

This is the first thing a customer hears when they call you, so it's essential to get this correct. Record a greeting that is welcoming, on-brand, and signifies to the customer that you're going to help them. Keep it short and to the point, clearly listing the various options of your IVR (remember, try to keep it around 5).

Available agents greetings

This greeting informs callers that an agent will be with them soon. We know customers don't like to wait, so now is not the time to be overly bubbly or verbose. Record a message that apologizes for the delay, offers appreciation for the customer's patience, and assures that an agent will be available as soon as possible.

Voicemail greeting

When prompting customers to leave a voicemail, ask them to provide the information your agents will need to best help them, such as account number, best time to call back, type of issues, etc. You should also provide the customer with information such as normal business hours and other support options (like self-service) so they can make informed decisions about how to proceed. (like self-service) so they can make informed decisions about how to proceed.

Hold and wait music

Hold music can be very polarizing. The right music can put a customer at ease, while the wrong music can take the unfortunate act of waiting for an agent and downgrade it to an unbearable nightmare. Empathy is a good tool when choosing hold music. Listen to the music yourself for a few minutes and note how it makes you feel. Have some other people do the same and ask them to imagine they're listening to this music while they wait for a support agent. If you're looking for inspiration, Zendesk held a contest to find the best hold music. The results are in and the winning music is free to download and use!

Learn more about managing outgoing messages here.

Splice information into your wait music

Add in helpful tips, announcements or self-service options to your wait music using a free program like Audacity so your customers hear more than just music while they wait for an available agent.

SETTING YOUR QUEUES

With Zendesk Talk, you can easily determine how many and how long callers will wait in the queue to talk to an agent. Industry "averages" are 80% of calls answered in 20 seconds, but what works best for your team may be different. Here are some things to consider to you set your queue configuration:

Ask your agents

Have they received feedback from any customers that they were waiting too long? Or have they themselves noticed anything that would be improved? Your frontline agents could be your best resource.

Consider your callers

What is the phone support experience that you'd like to provide your callers? Would you prefer that they wait longer to reach a live agent, or wait a short time before leaving a voicemail? Refer to customer satisfaction ratings or even reach out to customers to get their take.

Continue optimizing

Keep an eye on call queues and metrics (find more details in the section on "Measuring and Improving"). If you see, say, high levels of caller abandonment, you may need to shorten your queues.

The right music can put a customer at ease, while the wrong music can take the unfortunate act of waiting for an agent and downgrade it to an unbearable nightmare.

CHAPTER FIVE

Staffing and Training Agents

Now that you've taken the proper steps to set up Zendesk Talk, it's time to focus on the people who will use: your agents.

CHOOSING THE RIGHT AGENTS

As with everything else in work (and life), for the best possible results you want the right people for the job. In a broad sense, there are general skills that you'll want in any support agent: patience, intelligence and empathy to name a few. But phone support requires some specific attributes. Here are a few to look for when choosing agents:

Buoyancy

Working in customer service can be frustrating for even the most seasoned veteran. You don't want your agents to take the stress of the previous call into the next one. Look for agents who can deal with a stressful call and quickly bounce back for the next call. And the next. And the next.

Articulateness

Phone support is more immediate than email or even chat, where agents have a bit more time to think through responses. Phone agents must posses the ability to quickly provide clear, concise information.

Stamina

Phone support is a marathon, not a sprint. Agents must give consistently good service, call after call. Unlike other channels, they will have to maintain and project a positive demeanour, via their voices, throughout the day.

ANSWERING CALLS ON-THE-GO

Your agents can answer calls on their computers or, if they are away from their desks, forward calls to a mobile device or landline.

TRAINING AND COACHING YOUR AGENTS

Hiring the right agents is important, but you also need to train them properly and give them proper feedback and coaching so they know how to improve. Here are some tips for training and coaching your agents:

Give agents relevant knowledge

When a new agent joins your team, they will lack the relevant product or service knowledge. To get them onboarded, make sure you have a well-organized internal knowledge base (KB) they can use to learn about your product or service. Once they have read through the KB, role play with them to help them get comfortable helping customers on the phone.

Teach phone etiquette

Customers want to feel like they are talking to humans, not robots—in fact, research shows that agents with a more casual tone can result in higher satisfaction ratings than more formal, or robotic, tones. Give your agents the support and coaching they need to feel confident helping customers in a way that feels natural. Call recordings can be a helpful way to provide feedback to your agents. You can identify specific examples of things they've done well and opportunities where they could improve.

Train agents on Talk

We've designed Zendesk Talk to be easy to set up and use. In fact, it's so simple it only takes a couple of minutes to install and start helping customers over the phone. But, Talk also comes with a variety of tools that can help your agents serve your customers more effectively. Encourage your agents to read the short "Using Zendesk Talk" article in the Help Center and practice how to answer phone calls, make warm transfers to other agents and put customers on hold.

Give them helpful tools to optimize their workflows

The time that agents spend looking for information to help their customers adds up. Here are a few ways to simplify your agents' workflows:

- Use your Zendesk Support internal knowledge base or other helpful apps that make it easy for your agents to get access to customer, product, or troubleshooting information without making callers wait.
- Create macros and triggers for quick follow-up and triage. We already mentioned that you can build triggers to automatically assign voicemails for quick triage and resolution. We've also found it helpful for teams to create macros to send customers an email after a call, inviting them to reference the call recording in the customer portal and asking for their feedback.

Staffing your agents

In addition to understanding who you want to assign to phone support, you'll also need to develop a logistics strategy, including everything from phone support hours to the number of agents to staff.

TIPS FOR MORE EMPATHETIC PHONE SUPPORT

MIRRORING

- [ ] Listen to the customer and react accordingly. Someone in a hurry doesn't want cheerful chatter, and someone who wants to chat doesn't want to be rushed.

VALIDATING

- [ ] Sometimes your answer isn't what the customer wants to hear, even if it's the correct answer. Let them react, listen to what they have to say, address their concerns, then repeat the correct answer.

ACKNOWLEDGING

- [ ] Tell the customer you understand the problem and the reason for their call. Make sure they feel heard.

LISTENING

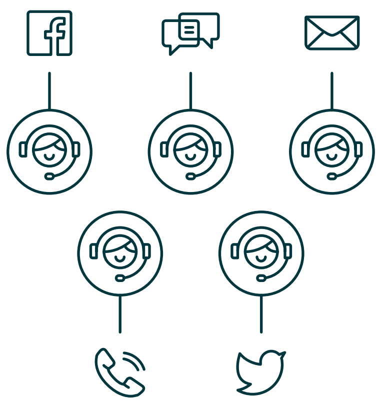
- [ ] The call will often go quicker and smoother if you just let the customer vent. Interrupting them to get the conversation back on track too often and aggressively can make the call drag on even longer. Hear what they have to say and help them.

SUMMARIZING

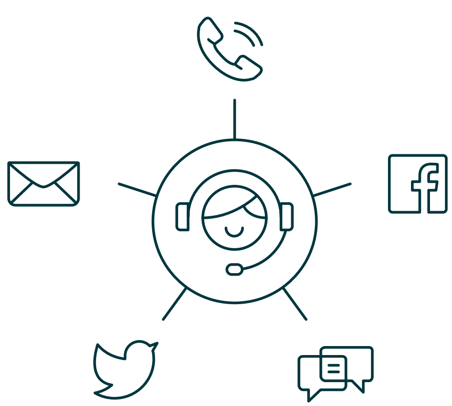
- [ ] Repeat back what a customer has told you in a supportive way. This demonstrates that you understand the problem.

COMMUNICATING

- [ ] Ask permission to put customers on hold and let them know how long it will take. If it looks like it will take longer, check back in and communicate this to them. The pain of waiting can be diminished if you set an expectation of how long it will take.



Dedicated model



Shared model

STAFFING YOUR AGENTS

In addition to understanding who you want to assign to phone support, you'll also need to develop a logistical strategy, including everything from phone support hours to the number of agents to staff.

WHAT STAFFING MODEL SHOULD I USE?

Consider what staffing model to use as you put together your agent assignment plan. Offering multi-channel customer service is the core of any organization's support strategy. But, in some cases it's not possible for agents to manage multiple channels and it's critical that there is a plan in place for assigning agents to channels. There are two methodologies for channel assignment: a shared agent model and a dedicated one. In a shared model, agents handle some or all channels simultaneously. In a dedicated model, agents are focused on a single channel.

Dedicated Model

There are pros and cons to either method, but in general if your organization has more than 10 agents it is recommended to use the dedicated model, at least for some channels. In this format, agents focus their attention on customers from one channel. For example, phone agents would only service phone customers for the duration of their shift. This model allows agents to develop a solid understanding of one channel and find the most effective methods of helping customers. Further, a dedicated model allows the support team to scale more effectively. The downside of this model is that agents often don't get a deeper understanding of a customer's problems as they end up escalating complex queries. This results in them (potentially) developing a shallower skillset.

Shared Model

In a shared model, agents are expected to work on the channels that require most attention and then switch over to other channels as they become busier. For example, a shared agent might start their day working on email support, but then switch over to answering phone calls as more start coming in. The advantage of this model is that agents maximize their time and are always solving customer queries. However, an agent would have to be highly trained to be able to effectively switch between multiple channels with little notice.

HOW MANY AGENTS DO I NEED?

Determining how many agents you need to staff is a little bit of an art and a science. The Erlang C formula helps estimate the number of agents required based on the estimated number of calls, average handling time (total time per call), maximum wait time and service level (the industry “average” is 80% of calls answered in 20 seconds). You can find a link to a handy Erlang C calculator here.

HERE'S A QUICK EXAMPLE:

100

Calls per hour

240

Average handling time (seconds)

80

Maximum wait time (seconds)

20

Service level (% answered within max wait time)

10

Recommended agents

WHEN SHOULD I STAFF AGENTS?

This is a slightly easier question to answer. In addition to knowing what hours to staff agents, you need a sense of when they can take lunch, breaks, and vacation. The answer will require you to track some data and tweak things until you get it right:

Days of the week

Mondays and Tuesdays are typically the busiest days for support, but you can keep an eye on your team's unique call volumes with the call volume dashboards.

Times of day

Lunchtime might seem like the best time to take lunch, but the fact is many customers use their lunch break to contact customer service. You might need to schedule lunch an hour before or after midday rush. The same goes for breaks; ask agents to take them during known quiet times.

Time zones

If you're a larger enterprise with customers in multiple time zones, you might want to stagger phone support to meet the real-world demands of your customers. Not everyone can provide 24/7 support, but that doesn't mean you have to limit work hours to local 9-5 hours.

Seasonality

It's important to understand busy times of year as well. If you're a retailer, and see a spike in calls during the holidays, you'll need to plan to staff up for those busy times.

HOW LONG SHOULD AGENT WRAP-UP BE?

Agent wrap-up gives agents the opportunity to put the finishing touches on a ticket after the call has ended but before they take the next call. It might be tempting to make this as short as possible, but doing so might lead to mistakes, such as important notes not being logged.

Luckily, automatic ticket creation and call recordings capture a lot of important call information, so agents don't need to spend too much time recording details after a call. However, the agent still needs time to log notes, particularly if the issue hasn't been resolved. If it's being escalated, the more information the agent can provide, the better.

Having said that, spending too much time on wrap-up can lead to longer hold times for customers. So if you find that too many tickets consistently lack relevant information, you might want to extend wrap-up. If hold times are too long, consider reducing.

CHAPTER SIX

Measuring and Improving

You've set up and configured Zendesk Talk and staffed phone support with talented, well-trained staff. Your work is done, right? Well, not quite. If you want to provide the best service to your customers, the kind that makes them choose you over your competitors and tell their friends and colleagues that they should all do the same, you must actively monitor phone support and take action to improve it.

There is no one-size-fits-all approach to this. Your company's profile and goals are unique, and things change. New products and services are launched, companies grow, local businesses become global businesses, and revenue goals are updated. It's up to you to decide what to measure and actions that can be taken to improve, but Zendesk is always here to help with powerful tools for measuring and improving your call center in the moment with real-time dashboards and over time with call data in Insights.

Remember: No metric lives in a vacuum. Tweaking one will impact others. For example, spending more time with customers to walk them through issues can improve first call resolution and/or customer satisfaction, but—without additional staffing—may lead to longer average wait time or abandonment.

Real-time queue activity

The Zendesk Talk real-time dashboards make it easy to monitor your queue and agent activity and make in-the-moment decisions to relieve bottlenecks, reduce wait times, and ensure your customers are getting the help they need.

Customers waiting too long or agents overburdened with long queues could indicate several problems:

- Too few phone agents
- Non-optimal IVR design (not properly deflecting or routing calls)
- An unexpected spike in volume caused by an outage, promotion or other unscheduled event

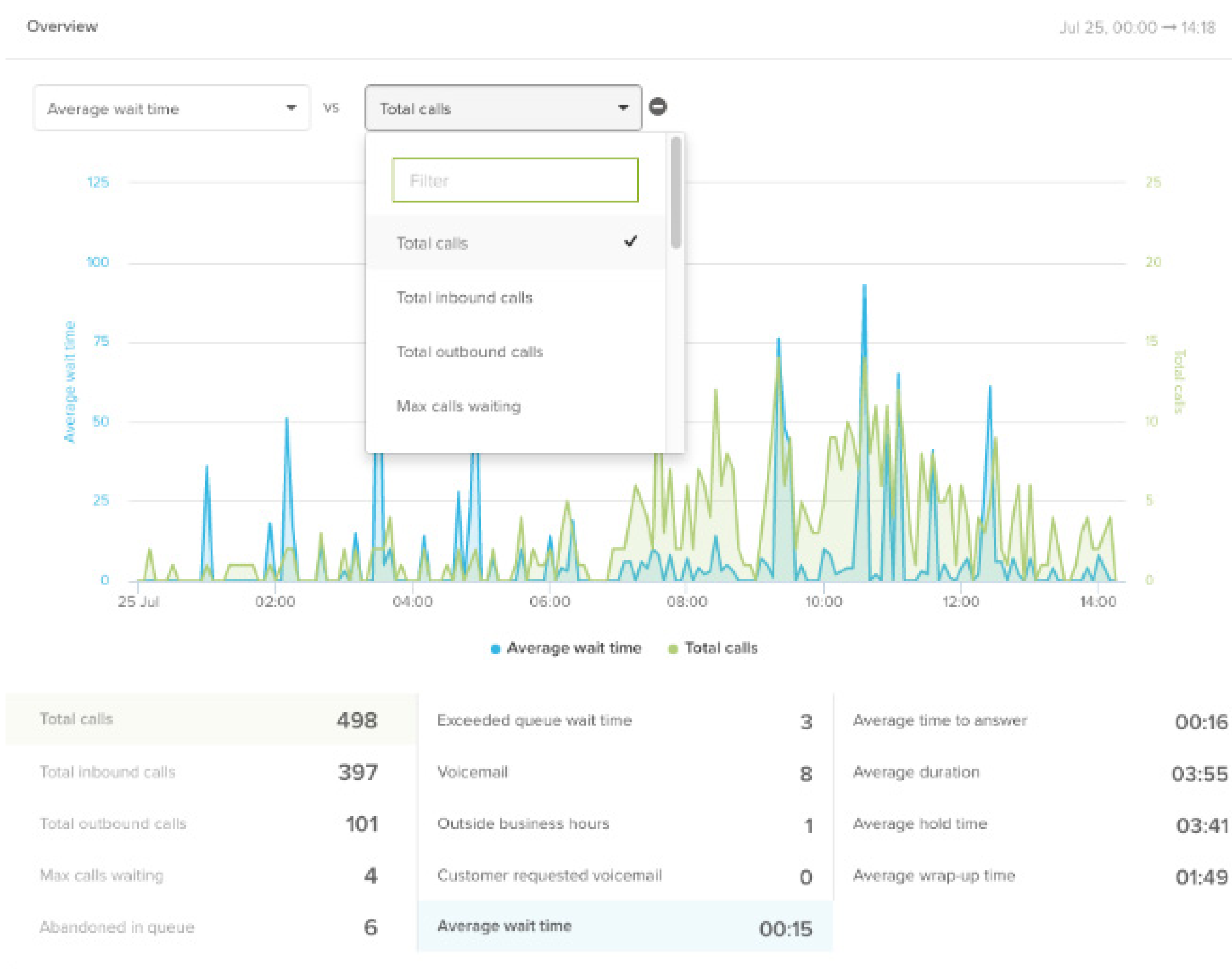
Quick tip

If your team is experiencing an unexpected spike in call volume due to a technical outage or other event, quickly change your main greeting to let callers know that you are aware of the issue and working to resolve it. That will get your customers the answer they need quickly and reduce the amount of callers in the queue.

METRIC	DEFINITION
Calls waiting in queue	Number of callers waiting for an available agent
Average wait time	Average time a customer has been waiting for an agent in the queue
Agents online	Number of agents online and available for Talk calls
Longest wait time	Longest time any customer has currently been waiting for an agent in the queue

Overview

Overview metrics take a much deeper look into the health and efficiency of your phone support.



The following are great metrics for scrutinizing during regular meetings and long-term planning sessions. They let you know where you're strong and which areas need improvement.

METRIC	DEFINITION
Total calls	Total number of inbound and outbound calls
Total inbound calls	Total number of inbound calls
Total outbound calls	Total number of outbound calls
Max calls waiting	Maximum number of calls waiting at any point in the specified window
Abandoned in queue	Total number of calls where customer hung up while waiting in the queue
Exceeded queue wait time	Total number of calls sent to voicemail after exceeding the max wait time in the queue
Voicemail	Total number of calls that went to voicemail for any reason
Outside business hours	Total number of calls received outside business hours

METRIC	DEFINITION
Customer requested voicemail	Number of calls where customer requested to be put through to voicemail by dialing 1
Average wait time	Average time a customer has been waiting for an agent in the queue. Excludes Available agents greeting.
Average time to answer	Average length of call, including wait time, hold time and time with transferred agents
Average duration	Average length of call
Average hold time	Average time spent on hold per call (based only on calls where hold is used at least once)
Average wrap-up time	Average wrap-up time across all calls

Agent Activity

These metrics focus on agents, both individuals and as a whole, and are essential for understanding agent performance.

METRIC	DEFINITION
Total online time	Total time the agent was on a call, in wrap-up mode, or online (browser must be open if using browser, can be closed if using phone forwarding)
Time available	Total time agent was available to answer calls and set to online. Does not include time on calls or in wrap-up mode.
Average talk time	Average talk time across all calls (excludes hold time and consultation)
Total talk time	Total talk time (excludes hold time and consultation)
Average hold time	Average time spent on hold per call (based only on calls where hold is used at least once)

METRIC	DEFINITION
Total hold time	Total time with calls on hold
Calls accepted	Total number of calls the agent answered
Number of calls transferred	Total number of calls the agent transferred to someone else
Transfers accepted	Total numbers of transfers the agent accepted
Calls missed	Total number of calls that rang for 30 seconds with no response and were placed back in the queue
Calls declined	Total number of incoming calls where agent clicked Decline in the given time period
Calls put on hold	Total number of calls placed on hold
Average wrap up time	Average wrap-up time across all calls
Total wrap up time	Total time spent in wrap-up across all calls

These metrics can surface some important issues. Are some agents not pulling their weight while others are doing too much? How many customers are calling but unable to talk to an actual person, or unwilling to wait for an extended period to do so? Are calls taking too long?

Monitoring these metrics will provide insight into which agents need better training as well as opportunities to improve workflow.

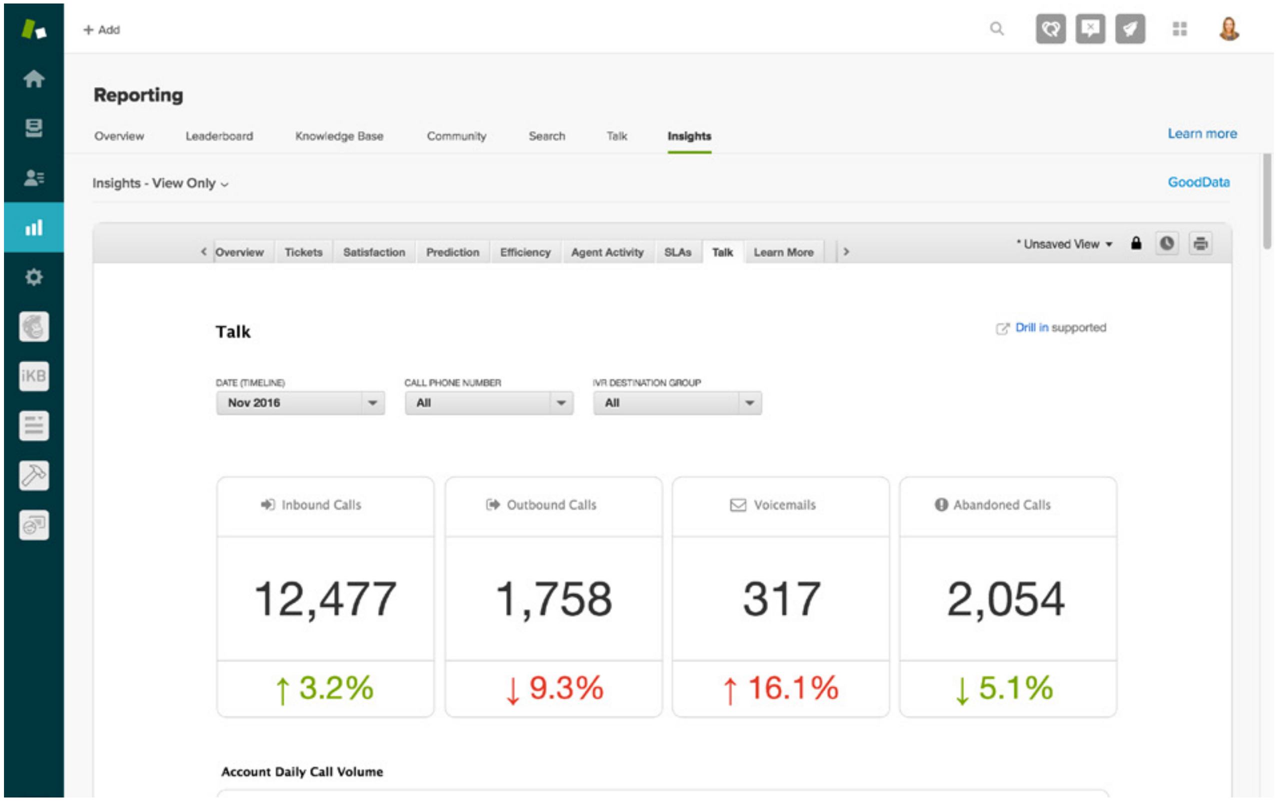
HISTORICAL ANALYSIS WITH CALL DATA IN INSIGHTS

In addition to the real-time dashboards, Zendesk Talk comes with the analytical power of Insights, which allow you to drill down into the historical performance of your call center. The out-of-the-box dashboards give you and your team the tools you need to understand what's working and how to improve. These include amount of inbound, outbound, and voicemail calls; inbound vs. outbound day-to-day call volume; call wait times; talk time; time spent in IVR; agent times; and number of abandoned calls.

Zendesk Talk comes with the analytical power of Insights.

Just a taste of the metrics available with the out-of-the-box Insights reports.

In addition to the out-of-the-box dashboards, you can create your own custom reports. You can find more information in our Help Center.



CHAPTER SEVEN

Conclusion

We hope this guide has given you everything you need to kick off and optimize a thriving phone support effort, one that runs efficiently and meets your customers' needs. We'll leave you with one key takeaway: improving phone support is an ongoing endeavour. The longer you offer it to your customers, the more experience and data you'll have at your disposal to improve. Zendesk is here to help you every step of the way.

Learn more at: www.zendesk.com/talk