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zendesk support

ZENDESK EFFICIENCY CHECKLIST

This checklist was created to help you start on your path to Zendesk efficiency—it includes basic steps your organization should complete to improve your Zendesk instance and support processes.

If you would like further assistance in taking your Zendesk instance from its current state, to the fully-optimized customer support platform you need it to be, sign up for a Zendesk Efficiency Review.

Book an efficiency review →

BRANDING & PERSONALIZATION

By completing the following checklist items, you can increase brand awareness through your support cycle and make your support processes look and feel more human.

- [ ] **Set up your branding**

Setting up your branding is important to build brand awareness and reduce any confusion your customers have when interacting with your help center. This blog shows how to update the colors, fonts, logos, favicon, and images in your Zendesk help center.

- [ ] **Add agent avatars or photos**

Make sure your agents update their photos and titles in their Zendesk accounts. This is an important step in making sure your customers feel that they are receiving personalized, human-to-human support, which can increase customer satisfaction.

- [ ] **Customize your chat widget**

If you have Zendesk Chat, we suggest you customize your chat widget. This makes your chat bot look and feel more human so that your customers feel like they are connecting with a real representative of your organization.

- [ ] **Add branded agent signatures**

Create branded signatures for all agents on your account. This will make agents feel more human and gives you the chance to redirect your customers to important links like your social media pages, your website, or upcoming event registration pages.

- [ ] **Change your help center URL to your branded URL**

By default, the address of your help center is a Zendesk subdomain: **mycompany.zendesk.com**. However, you can map a subdomain so that your help desk URL looks like this instead: **support.mycompany.com**. This will prevent user confusion and helps keep your customers on your webpage after their support ticket has been resolved. More time on your website = more purchases.

- [ ] **Use your branded email domain to send support emails**

We suggest setting up automated support emails to come from your own email domain instead of a Zendesk email domain. There are a few steps to this process, but it should take you no more than 10 minutes. This will prevent confusion during the support process, show that there is a real human behind your support process, and increase brand recognition.

WORKFLOWS & CHANNELS

By completing the following checklist items, you can automate and streamline your support processes, thereby reducing ticket resolution times and improving both customer and agent satisfaction.

- [ ] **Add custom ticket fields**

A custom ticket field allows you to add an additional form field on your ticket submission form. This helps you gather more information about support issues (outside of the default ticket fields), like which product a customer is needing support for. Custom ticket fields are important because they allow you to build automation and triggers, like which rep follows-up or what priority that submission is given.

- [ ] **Add custom user fields (for B2C)**

Creating custom user fields allows you to gather additional information about individual customers that you service, outside of the default Zendesk user fields. Example custom user fields may be: date of last purchase, subscription renewal date, or average annual spend. By gathering this information, you can determine which customers you need to prioritize.

- [ ] **Add custom organization fields (for B2B)**

Creating custom organization fields allows you to gather additional information about organizations that you service, outside of the default Zendesk organization fields. Example custom organization fields may be: account type, monthly spend, or subscription renewal date. Using this information, you can create a trigger to automatically set the priority of tickets, loop in relevant sales teams when necessary, and assign agents.

- [ ] **Create views to manage ticket workflow**

Setting up views is one of the most important items on this checklist. When you set up views, you enable your agents to work with purpose and efficiency. Views allow you to visually and automatically organize tickets based on certain criteria (like support tier) so that your team knows which tickets need attention first.

- [ ] **Create and organize your macros**

A macro is a prepared response or action that an agent can manually send or apply when they are creating or updating tickets. This saves agents the time and effort of manually responding to multiple customers with the same issue. Agents simply evaluate tickets and apply macros manually as needed. Here's a list of macros available for your support tickets.

- [ ] **Enable and use CSAT Surveys**

If you are on a Professional or higher Zendesk plan, you should take advantage of CSAT surveys. Enabling CSAT surveys will help you track agent performance and understand factors that lead to higher customer satisfaction.

WORKFLOWS & CHANNELS (CONT'D)

Configure email CCs and follower permissions

When you enable CCs, you allow internal users (your agents and admins) and external users (your customers) to 'cc' other users when replying to ticket notifications by email. When you enable followers, you allow internal users to receive email notifications about updates to tickets, but their name and email address do not appear in email notifications to other people on the ticket. This removes communication barriers between teams when solving tickets, leading to faster resolution times and more satisfied customers.

If your Zendesk account was created after 2019, here are instructions to configure your CCs and follower permissions.

If your Zendesk account was created before 2019, here are instructions to migrate to CCs and followers.

Set your support hours and holidays

If your organization does not provide 24/7 support, we suggest setting up schedules in Zendesk so that your customers have clear expectations on when your agents will and won't be available to assist them.

Automatically redact credit card numbers from tickets

Sometimes customers unnecessarily enter sensitive information such as credit card numbers in tickets. You can use a feature called Automatic Redaction to redact, or remove digits from credit card numbers found in ticket comments or custom fields so you can always keep confidential customer information out of harm's way.

Install relevant apps and integrations

Zendesk Marketplace has a great selection of free and paid apps that you should integrate with your Zendesk instance for improved efficiency.

TRIGGERS & AUTOMATIONS

By completing the following checklist items, you can prevent ticket backlogs, prevent customer churn, and improve your customer ratings across the web.

- [ ] **Automatically solve pending tickets after a set amount of time**
  Sometimes customers submit tickets and never follow up to actually receive help. If you'd like to prevent a ticket backlog due to this issue, you can set tickets to automatically solve after a certain amount of time or you can follow Zendesk's Bump Bump Solve technique.

- [ ] **Review the default Zendesk triggers**
  Zendesk Support has a set of 9 standard triggers that are used as a default in your support ticket workflow when you begin using Zendesk. While these triggers are commonly used across organizations, we suggest you review, modify, repurpose, and delete these triggers to better fit your organization's unique support process.

- [ ] **Set up a trigger to notify agents and managers about bad CSAT scores**
  When you receive bad CSAT scores and negative comments, it is important to follow-up with customers immediately to prevent churn and negative word-of-mouth. You can set up a trigger that automatically notifies agents or managers when a customer shares a poor rating so you can resolve the issue immediately.

- [ ] **Set up a trigger to collect additional customer reviews following a good CSAT rating**
  On the flip side, when a customer provides you with a good CSAT rating, it is worthwhile to invite them to provide a review for you on other review websites. You can create a trigger that sends an email asking a customer to review you on another marketplace right after they submit a CSAT survey with a favorable rating.

KPIS & REPORTING

By completing the following checklist items, you will gain understanding of average ticket resolution time, see how each agent is performing, and quickly share high-level information with your leadership team.

- [ ] **Get familiar with the Zendesk Explore dashboards**

  Zendesk Explore comes with some dashboards pre-built for your organization. Get familiar with your Support activity and your Knowledge Activity dashboards so you are able to report to your leadership team with ease.

- [ ] **Set up and use Zendesk's Time Tracking app**

  To understand how your agents are performing and see what your average ticket resolution time is, you should set up the Time Tracking app and define which metrics your organization should be tracking.

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