

Support - Zendesk

Customer Support Values

Every person from the team please read this article:

<http://about.zappos.com/press-center/media-coverage/zappos-milestone-customer-service>

Configure your Zendesk

- Create 3 user admin level accounts. One general account for floater employees to share, 2 accounts for full time support desk workers.
- Use the company logo for the general account while the 2 accounts for full time support should show pictures of themselves. This would:
- Make customers less mad knowing that they are dealing with “real people”
- More personable

Setting up the Help Center

<https://company.zendesk.com/hc/en-us>

The Help Center has the potential to be a helpful knowledge base for our clients. Most questions that clients have about product info and setup are actually in the tutorials and training manuals. Although we usually have tutorials/training manuals in the Member’s Area, not all clients take the time to take a look at it. You can place links of tutorials/training manuals in the Help Center. If they find what they need here, then they won’t have to open a submit a ticket.

It would also be helpful to create a tutorial for clients on how to submit a ticket in the Help Center.

As a general rule, never give out a zendesk email. Instead give out the zendesk url such as <http://companyname.zendesk.com> This is because we want to force customers to fill out a form and supply us the proper information such as their paypal email and product (from a drop down list) the ticket references. We have found that if customers simply file a ticket via email they will leave out important info and we'll inevitably have to write back to request. Each response/request delays customers and causes frustration not to mention the real cost associated with each ticket \$1+

Submitting a ticket

<https://companyname.zendesk.com/hc/en-us/requests/new>

The ticket fields with * are required for the clients to fill up. We want to collect all the information that we need for the faster resolution of tickets. The Help Center ticket fields can be configured in the Zendesk Admin panel. Under the category Manage, click on Ticket Fields.

- Every company desk needs to have these same fields at a minimum. Be sure to add the custom fields which you do not have so that info is captured.

Ticket Fields can be in different forms.

Macros

A macro is a prepared response or action that agents use to respond to support requests. Macros are very helpful in answering tickets. You can create templates of generic responses for common issues that people email about.

To add a Macro, go to the Zendesk Admin Panel, under Manage, click Macros.

This is a great way for support staff to leave notes about the ticket for the next support staff who would be handling the ticket. To do this, instead of clicking on Public reply, click on Internal note instead. This will post the internal note within the ticket, only visible to the Zendesk agents/admins.

Suspended tickets

You can find the Suspended tickets by clicking on the views tab on the upper left side of the Zendesk panel. This is where Zendesk places those tickets which are categorized as spam. However, there are instances when regular emails are also transferred here so it is still important to this area every day.

To manage suspended tickets, tick the box to highlight all the emails and click on the option Delete 30 tickets. This will delete all the emails in bulk.

To recover a client's email that was mixed up in the suspended tickets, click on the email and choose the option Recover Automatically. The email will be transferred to Zendesk home.

Marking tickets as Spam

Tickets can be marked as spam and suspend the requester at the same time. Tickets marked as spam are permanently deleted but suspended users can be unsuspended if necessary.

Open the ticket you wanted to mark as spam.

Click the Ticket options menu in the upper right, then select **Mark as spam** from the dropdown.

Click **Immediately mark as spam** to confirm that you want to continue.

Merging tickets

Duplicate tickets from the same requester can be merged into one ticket instead of responding the same inquiries with the same message. Once you have merged tickets to another ticket, one gets closed with a note stating that it has been closed and merged into a ticket number.

Check out the tickets that has the same content.

Open the ticket you would like to merge into another ticket. From the left corner click on the down arrow and choose merge into another ticket.

You can enter a ticket number, select one of the ticket requester's open tickets, or select one of your recently viewed tickets.

When you select a ticket to merge into, you'll be prompted to confirm the merge. You can also edit the merge comments that are added to each ticket and also set whether or not the comments will be public or private using the **Requester can see this comment** option.

The ticket that is merged into another ticket will get closed. A note will then be added to the ticket about the merging.

Blocking / Suspending Emails

To add domains or emails addresses to the Suspended/Blocked list, go to Admin > Settings > Customers. Add the email address or domain to the Blacklist. Emails from GTW or DAP should be added to this list.

Removing Emails from Suspended Tickets List

For client emails that you found in the Suspended Ticket list, remove the domains or emails addresses by adding them to the Whitelist to make sure that their emails will not go to the Suspended list again.

Bulk updating tickets

To save time responding the same issue of multiple tickets use the bulk update. To do that open one of your views and select the tickets you want to update. You can pick and choose the tickets you want to update or select the entire list by clicking the check box at the top left of the view.

After clicking the Edit tickets button, a pop-up page where you type in your response or use a macro in response to customers' concern then click the submit button.

Creating ticket filters/triggers

Triggers take action when a ticket is created or updated. High ticket customers must be treated differently than low ticket customers. Triggers can be created to give priority to these clients. Some issues also need to be handled more rapidly than the rest. Triggers can also be applied in this case.

To access this, go to Zendesk dashboard, under Business Rules, click on Triggers.

This is how it would look like in Zendesk Dashboard. Urgent/high priority tickets are grouped at the top of the ticket list.

Creating ticket automations

Automations take action to modify ticket properties at a specified time after a ticket is updated. For example, an automation sets tickets to Closed four days after they are Solved.

Zendesk metrics

Reports give you insight into daily ticket activity, agent performance, trends, average resolution times, and so on.

Tracking Daily Ticket/Agent Activity

This is one of the important reports that should be generated monthly, if not weekly.

To do this, go to Zendesk Admin panel, under Manage, click Reports.

- Click on Add data series.
- Fill up Legend for this data series (Variable 1).
- Choose which ticket report you want to pull up – whether these would be Resolved / Unsolved / Old or All tickets.
- To add parameters, click on the green +
- You can add more than 1 parameter

For the example below, the date coverage was set to 1 week. There were 3 Legend Data Series created (Bilal, General, Marie). This report only included resolved tickets. The Parameter chosen was Ticket Assignee. First ticket assignee is Support Staff 1, 2nd ticket assignee is Support Staff 2, and so on. After that, submit for preview and Zendesk will show you the graph, with the statistics shown below it. The numbers shown below are the number of tickets closed by each agent per day.

Zendesk apps that can be useful

You can find this under Apps > Marketplace

It is advised that you install the App – Five most recent – shows the client's 5 most recent tickets on the right side of the ticket

To install – click on the App Five Most Recent and click on install. After that, restart Zendesk, go to the ticket field and click on the Apps button on the upper right of the screen. This will start the App.

This is how the App will look in the ticket area.

Testimonials

Zendesk is also a great place to find testimonials from clients.

Publishing Zendesk and contact info

- What info to put where so everything goes to support...

Support should monetize tickets by making offers for upsells and upgrades. Buy now links can be created to facilitate on the fly. Support should instruct the customer to reopen the support ticket/update support ticket after making payment. Following code MUST be edited before sending to customer, paying special attention to the amounts and names of the product in the querystring below:

https://www.paypal.com/cgi-bin/webscr?cmd=_xclick&business=payments%40techmarketing%2ecom&item_name=All%2din%2dOne%20Package&amount=200%2e00¤cy_code=USD&button_subtype=services&no_note=1&no_shipping=1&bn=PP%2dBuyNowBF%3abtn_buynow_LG%2egif%3aNonHosted

Tips

- Employees must print off this PDF, tape to their monitor and memorize these.
<https://assets.zendesk.com/agent/assets/keyboard-shortcut-cheatsheet-ace2611cf40fdd7e05ac05ba7b75c79e.pdf>
- Zendesk can handle any email address @deskname.zendesk.com, it does not have to be “support@” can instead be “coaching@”, etc.
- Refunds cost the company significantly. It is always better to offer the customer a future or past product of the same value as a replacement if they are unhappy. In essence offer them a store credit if they agree not to refund.

How to handle refunds/ Reduce refunds

- When handling refunds, it is best to offer support first before refunding. More often than not, clients refund when they do not understand a product or when they feel that they are not getting the help that they get. It would also be helpful to create macros for refunds.
- Previous products can be offered instead of refunding. In some cases customers doesn't have technical knowledge so offering to install the product to their site is a magic that entice them to choose a product instead of a refund.
- Most clients who ask for refund expect an immediate reply to their ticket so it would be best to include refunds in Zendesk triggers.
- There's no harm in asking the reason why they don't want to utilize the product. In this manner ideas can be collected and might be useful for future product updates.

1. Quick and soothing gratification

- a. take your customers immediately to a Thank You page (and perhaps even include a video literally telling them, “Thank you!”)
 - b. email the customer a summary of their order within 15 seconds of the user clicking “Purchase.”
2. Make sure all materials, tutorials/videos needed in implementing the product are available and working properly.
 3. Introduce a feedback forum where customers send their feedback about your products and their feature requests. Then on a weekly basis look at the top features and adjust product development to meet customers’ needs. Giving a bonus for the top feature requests will also encourage customers to share more what’s on their mind.
 4. Actively interact with your customers. Respond to every single comment or forum topic. It shows that you do care about your community and will lower your refund rate.
 5. Respond to inquiries and or give assistance at the soonest possible time to customers who contact support desk. Never mark a ticket as solved if there is no resolution given to the inquiry yet. Making a ticket as solved after initial response gives an impression to customers that you are not happy/willing to help them. In short it gives a bad image of your customer support.
 6. Instead of giving your customers everything at once, stage-out value over time. If you were planning on giving your customers five bonuses, give them a bonus every quarter instead. Best not to announce additional bonuses but just send it to them later as a surprise gift (a week after launch or promo).
 7. Before giving refunds try offering assistance in setting up the product in order for the customers to have a clearer view of how it really looks like once it’s up and running.
 8. If you have previous products you can offer them any in exchange of a refund.

Support: When to escalate tickets?

If support is receiving tickets of the same issue from different clients, it may be a good time to investigate on it further. Ask clients for screenshots and how they got the errors.

Before escalating a ticket, try searching for possible solution and if the client gets back and said it did not resolve the issue then it's time to escalate it to a group. If possible add an internal note of a short description of the issue and what suggested solution was given. This will save time for the other team to know what is going on.

Enhancement requests

- One of the request types in the ticket form submitted by clients through Zendesk Help Center is about Enhancement requests. This gives us an insight of what features clients want in a certain product. This would be useful for products that we plan to re-launch.
- To view Enhancement requests and all the other tags, click on Admin > Manage > Tags
- This will show the Popular Tags along with how many times they were used
- Click on a tag to view all the tickets that used that tag

Swipes/Macros

ACCESS DETAILS SWIPE

Hi <client>,

You can access the <product> here: <link>

Email:

Password:

You can find the bonuses here: <link>

You can view the training videos here: <link>

Feel free to contact us if you have questions.

Regards,

<name>

Support Team

Hello {{Requester}}

Thank you for contacting support desk about your concern.

Here are your login details:

Link:

Username:

Password:

Please find the video tutorials and bonuses in the members area.

Check out also our FAQ about the product in here: (link to the product category FAQ)

For further inquiries or assistance with our products please don't hesitate to contact us.

Good luck and thank you for your continued support!

Cheers,

{{assignee}}

Support Team

NOTE: Most requests for access details occur at the start of a launch. Aside from that, clients also ask about their bonuses and training. It would be best to include these when sending out access details so clients won't have to email back support to ask about them.

REFUND SWIPE

Hi <client>,

We regret that you are requesting for a refund for <product>. We really put a lot of work into this product as you can tell. Were you able to look around and install the product? May we see one or two to see if we can help you improve them?

It saddens us that you feel like this product did not meet your expectations. In fact, we've had many people who have told us the opposite; and that it was much more than they expected!

Would you want to take a look at some of our products instead of refunding? We are willing to offer <product 1>(sales page link) and <product 2> (sales page link). If you are interested, we can give you access to these products. But if you still prefer to refund, please reply to this email and confirm your refund request. Thanks!

Regards,

<name>

Support Team

Hello {{ticket.requester.first_name}},

Thank you for contacting support desk. Sad to know you are requesting a refund for this awesome product.

We are aware it is mentioned there are no questions asked when requesting for a refund but jut want to ask one (1) question. Aside from (REASON MENTIONED), is there any other reason why you don't want to utilize the product? We personally guarantee this product will work for you! This product has a 30 day money back guarantee so would you like to try using the product first and see if this works for you. We also have a team who are more than happy to assist you whenever the need arise.

If not would you like to grab any (INSERT NUMBER OF PRODUCTS) of our high ticket products instead of a refund. Here is the link to our product so you can check what each one does: (LINK TO THE PRODUCTS SITE) For whatever products you choose we will deliver you the main and it's OTOs.

Please let us know what you think and we'll go ahead with it.

Cheers,

{{current_user.first_name}}

Hello {{ticket.requester.first_name}},

Thank you for contacting support desk.

Checking back our record the product that you are requesting a refund for is made more than 30 days ago. It is mentioned in our salespage that we give refunds within 30 days prior to purchase. Sadly we are unable to give you the refund.

Is there anything we can help you with to make this product work for you? Please let us know what assistance you need so the team can help you out. If possible send us screenshots of issues you are getting to give us a clearer vision your concern and will be able to give you the right solution.

Good luck and more success to you!

Cheers,

{{current_user.first_name}}

NOTE: In rare cases some customers ask for a refund after the refund period. Take note to check date of purchase before responding to a refund request otherwise you will be refunding products that is not already valid for refund.

REFER TO DEVELOPER SWIPE

Hi <client>,

Thank you for telling us about the errors you got. We would appreciate it if you can send us screenshots so we can investigate this further. We will be forwarding this issue to our developers. We shall keep you posted on its progress.

Regards,

<name>

Support Team

MISSED PRODUCTS SWIPE

Hi <client>,

Thank you for your interest in <product>. We just wanted to inform you that this product is no longer open to the public. However, we do value our clients so we will make an exception for you. We are willing to give you this product at a discounted price of \$—. All you need to do is to click on this Paypal link to purchase <link>. After that, please forward the purchase receipt you will receive from Paypal and forward it to us so we can give you access details to the product.

Thank you for your continued support!

Regards,

<name>

Support Team

Hello {{ticket.requester.first_name}},

Thank you for contacting support desk.

Unfortunately the offer is closed in the system and we cannot reopen it for individual orders because that would be unfair to those who purchased prior to the deadline. But since you are one of our valued customers my superior agreed to allow you to purchase the product but only as a package at [please choose the package price (Main – \$177; other products- \$97)]. The package will include the main +

OTOs/Dsell.

If you agree with this please paypal your payment to payments@<company-name>.com then send us a copy of your transaction so we will manually create your access.

Cheers,

{{current_user.first_name}}

LOCKED PRODUCTS/CAN'T ACCESS MEMBERS AREA SWIPE

Hi <client>,

We apologize for the inconvenience. Our database shows that you have purchased <product 1> and <product 2>. We have updated your access to the Member's Area. Please try to login again.

You can access your products here:

<link>

<link>

Kindly try it out and let us know if problem persists.

Regards,

<name>

Support Team

UNSUBSCRIBE FROM EMAILS SWIPE

Hi <client>,

We're sorry about the numerous emails. We were excited about our new product that's coming out and we wanted you to be the first to know! If you do not wish to receive emails, you can find the link to unsubscribe at the bottom of the email. Please refer to this screenshot for a guide on how to unsubscribing: <link>

Regards,

<name>

Support Team

Hello

We apologize for the numerous emails. We are excited to let you know about [our new product or one of our affiliate product] which we know you can use to grow your business so we wanted you to be the first to know. But if you do not wish to receive further emails, you can unsubscribe using the link at the bottom of each email. In the future if you would like to opt-in our list again just ping us and we'll be glad to add you in again.

Thank you for contacting support and have a great week!

Cheers,

CLIENT FEEDBACK SWIPE

Hi <client>,

Thank you for the feedback, we appreciate it. Your input will help us improve our products and services to be better. If there is anything that we can help you with, do not hesitate to contact us. Have a great day!

Regards,

<name>

Support Team

NOTE: Be quick to thank a customer whenever a feedback (positive or negative) is received. Let them know we value every comment/feedback because it helps us improve the quality of our products and services. The same when a ticket is rated. Avoid waiting for the ticket to get closed and creating a follow-up ticket just to say thank you. It is a good work ethic to be thankful in everyway.

LOGIN DETAILS WITH UPSELL SWIPE

Hi <client>,

You can access the <product> here: <link>

Email:

Password:

We just wanted to inform you that the upgrades are only available at a discounted price until <date>. Do not miss your chance to grab this great deal! If you are interested, you can check the upgrade here – <link>

Regards,

<name>

Support Team

REFUND AFTER 30 DAYS SWIPE

Hi <client>,

We regret to inform you that we cannot refund your <product> purchase. Our records show that you purchased last <date>. This means that your purchase is no longer within our 30-day money-back guarantee. If there is anything else we can help you with, please let us know.

Regards,

<name>

Support Team