Guide to SaaS Help Desk Solutions: 6 Requirements

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zendesk

Table of Contents

Executive Summary

In the past decade, Software-as-a-Service (SaaS) has come of age. In every industry, enterprises large and small are making the switch from on-premise enterprise software applications to hosted services. SaaS solutions enable employees and customers to take advantage of process automation and business intelligence functionality using any Web browser as the client software. There are no hardware requirements, no software to install, no maintenance required, and users can get up and running quickly.

Among the applications being transitioned to SaaS, high on the list of priorities are those designed to help manage customer support. With the proper approach, web-based help desk solutions not only improve agent productivity, but also greatly enhance customer satisfaction by enabling self-service with a wide range of user options.

Unfortunately, not all SaaS products are equally mature and feature rich. Organizations considering web-based help desk solutions should carefully evaluate vendor offerings against the following criteria:

1. **Ease of Implementation** –Web-based customer support should be significantly faster and easier to implement than traditional software. Look for customer references to validate vendor claims.

2. **Automated Ticket Management** – The SaaS help desk solution should fully support all existing support processes with rule-based triggers, notifications and views.

3. **Multi-Channel Support** – To engage customers on their own terms, the help desk solution should enable agents to centrally manage support processes across multiple communication channels including email, Web, social media, online chat, community forums, and native support for mobile application platforms, including iPhone, iPad, Android and BlackBerry.

4. **Reporting** – Managers and agents should be able to easily run reports and use advanced analytics to track metrics like customer satisfaction, agent performance and ticket resolution times.

5. **Integration** – The solution should come with pre-built integrations to Customer Relationship Management (CRM), Time Tracking & Billing, Project Management and many other applications, as well as offering APIs for custom integrations.

6. **Customization** – Branding in the age of the Internet requires that web-based solutions be fully customizable to conform with company standards.

1. Ease of Implementation

Companies are adopting SaaS solutions for two basic reasons – quicker time to value and lower total cost of ownership (TCO). Enterprise software requires up-front license fees and time-consuming implementations, often involving costly consulting engagements. With cloud-based solutions there are no set-up fees, and users can get up and running very quickly. As a result, more and more corporate functions are being managed in the cloud, with customer-facing processes among the highest priorities.

By proving to be responsive, reliable and secure, SaaS offerings have allayed skeptics' reservations and gone mainstream. "Initial concerns about security, response time and service availability have diminished for many organizations," said Mertz.[1]

Quick implementation is a major selling point for web-based customer support. Agents should be able to implement the SaaS solution significantly faster than traditional software. Full enterprise deployments can take longer, depending on size of organization and complexity of business rules, but in any case should be significantly faster and easier than those for enterprise software. Look for customer references to validate vendor claims.

> *"Content, communications and collaboration SaaS offerings continue to dominate the enterprise application market…"*
>
> *– SHARON MERTZ*
> *GARTNER ANALYST*

2. Automated Ticket Management

Ticket management is at the core of efficient, effective customer support. The help desk solution must provide support for existing business processes with rule-based triggers, notifications and views. Specific requirements include:

- **Unified search** – Agents should be able to search for topics covered not only in tickets, but also in knowledge base articles as well as questions, answers and ideas contributed through customer community forums

- **Custom ticket fields** – In addition to standard fields such as status, type, priority, group and assignee, users should be able to configure new fields and use them for grouping tickets or applying business rules like macros to enable prepared responses to frequently asked questions (FAQs).

- **Customer interface** – The solution should provide interfaces for both agents and customers so that full ticket history is available for all end-users.

- **Customer groups** –Agents should be able to group customers by organization, allow group members to see each other's tickets, and use business rules to escalate issues from priority customers.

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[1] Fahmida Y. Rashid, Gartner Predicts $10.7 Billion Market for Enterprise SAAS Applications, eWeek (December 14, 2010)

3. Multi-Channel Support

To satisfy customers in today's world, it is absolutely essential that the help desk solution support multiple communication channels. Today's customers use a wide variety of means for communicating with each other, and they expect the companies they buy from to do the same. In short, you have to meet your customers where they live. Today that means the help desk must be capable of connecting with customers via email, the Web, social media, online chat and community forums. It also means native support for mobile application platforms, including iPhone, Android, BlackBerry and iPad.

Internet communications have radically changed expectations of how customer service is delivered. Rather than phone support, the trend is to online self-service. According to Forrester Research, 36% of online U.S. customers prefer self-service. That preference is even stronger among younger customers: 46% of 18- to 29-year-olds and 42% of 30- to 42-year-olds prefer to be self-reliant. Only 28% of respondents prefer to resolve a service issue by speaking to someone on the phone.[2]

"There is the trend to being able to work anywhere and anytime," said Roy Atkinson, an analyst with HDI, formerly known as the Help Desk Institute. "And that requires more support, so the environment as a whole is probably more complex."[3] In fact, the proliferation of channels has led to an increase in support requests overall, according to a 2010 study released by HDI, which found that the number of incidents reported to help desks via chat, e-mail, telephone, self-help systems, social media, the Web and walk-ins is rising, with 67% of all help desk operations experiencing increases in 2010. That's roughly the same percentage who reported an increase in 2009.[4]

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> *AN ANALYST WITH HDI,*
> *THE HELP DESK INSTITUTE*

Social media such as Facebook and Twitter are now significant channels for customer support. Almost 20% of people using Twitter seek customer support from a business each month, and 61% seek information about products or services.[5]

Mobile platforms represent yet another rapidly growing channel for customer support. According to Nielson, we are entering a new wireless era where smartphones will become the standard device consumers will use to connect to friends, the Internet and the world at large. This increase will be so rapid, that by the end of 2011, Nielsen expects more smartphones in the U.S. market than feature phones.[6]

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[2] Diane Clarkson, It's Time To Give Virtual Agents Another Look, Forrester Research (December 18, 2009)
[3] Patrick Thibodeau, Help desk calls on the rise, Computerworld (January 5, 2011)
[4] Ibid.
[5] Social Media Stats and Why Dealers Should Care, ISMDealers.com (November 9, 2010)
[6] Roger Entner, Smartphones to Overtake Feature Phones in U.S. by 2011, NielsonWire (March 26, 2010)

The proliferation of communications channels – from email and online chat to social media and smartphones – presents a growing problem for customer support organizations: how to stay on top of conversations going on concurrently across multiple media in order to accurately track and solve customer issues. According to a recent study, 85% of the contact centers observed by Gartner indicated that their multiple interaction channels are not synchronized.[7] Thus, multi-channel synchronization has become the top priority for many companies.

Without the ability to synchronize channels, agents waste valuable time navigating from one communications channel to another. That is why organizations evaluating SaaS help desk solutions should make multi-channel support an absolute requirement. Users should be able to turn any email into a ticket instantly; add a tab to any web page allowing users to search a knowledge base or submit a ticket; convert "tweets" to tickets with one click and take a Twitter conversation private; allow customers to chat online with a support agent from within any ticket or webpage; and publish articles, ideas and questions on community forums with knowledge base access and user voting.

4. Integration

In order to get a single view of the customer, it is important that the help desk solution be integrated with other customer-facing applications. No help desk is an island. Only through collaboration with other departments can the support team deliver outstanding customer service. That means gaining access to customer interactions and histories residing in other systems. The help desk solution should come with pre-built integrations to leading solutions in each of the following areas:

- Analytics

- Authentication

- Content Management Systems (CMS)

- CRM

- Ecommerce

- Feedback Management

- Project Management

- Time Tracking and Billing

Integrations with leading enterprise SaaS applications such as Salesforce, NetSuite and Google Analytics help organizations create a single view of the customer.

In addition to pre-built integrations, users should be able to easily perform custom integration using APIs. To ensure continued high productivity, single sign-on integration should also be included so that users can access the help desk without a separate login.

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[7] Garner (February, 2010)

5. Reporting

One of the key benefits of help desk automation is the ability to analyze tickets by a variety of attributes, including status, priority, type, tag, resolution time, organization, group or assignee. When evaluating solutions, buyers should look for pre-built dashboards with metrics on top trends, as well as the ability to generate custom reports based on tagging. The solution should offer data portability so users can export data using CSV and XML file formats. In addition, the solution should enable the use of advanced analytics for tracking customer satisfaction, agent performance and ticket resolution times.

> *"You can't optimize customer relationships if you don't make analytics pervasive across all channels, touchpoints, transactions, and business processes."*
>
> *– JAMES KOBIELUS FORESTER ANALYST*
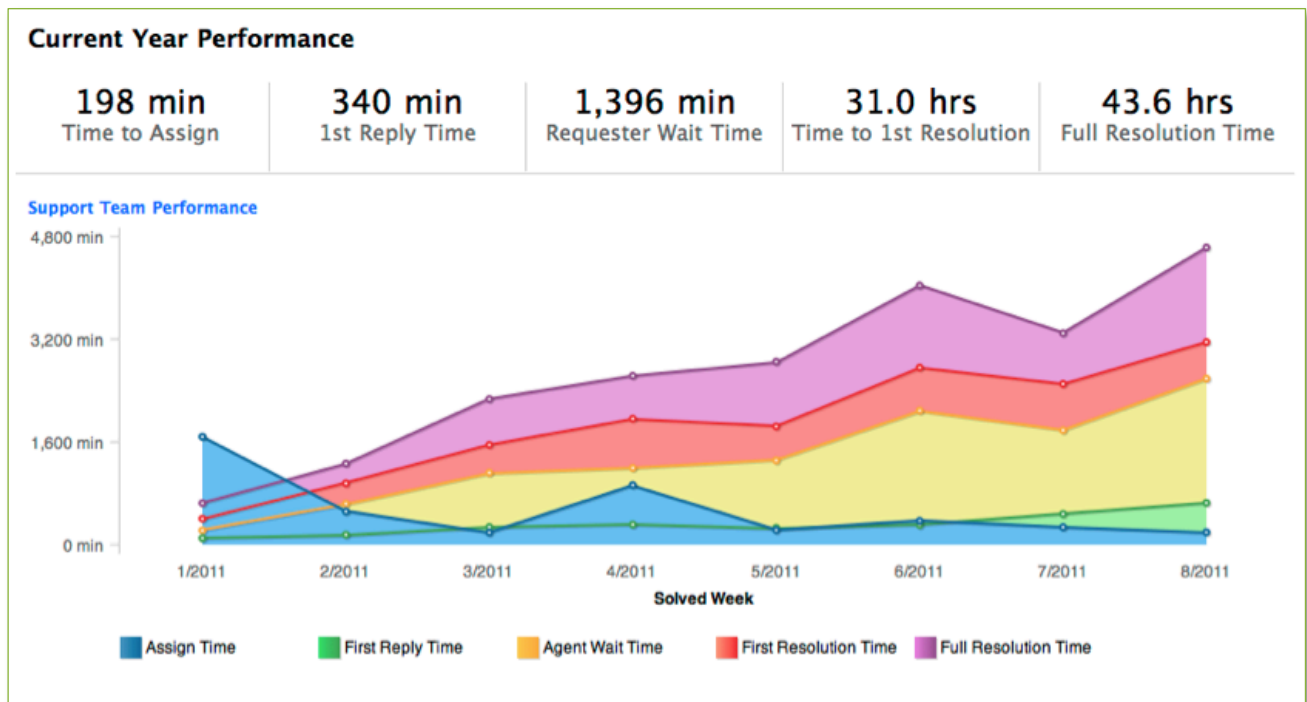
6. Customization

Successful branding in the age of the Internet takes a lot more than logos and colors. It means presenting consistent, recognizable interfaces and processes across every customer interaction, whether in person, by phone or online. Make sure the help desk solution you select allows you to consistently greet and interact with customers according to the unique attributes of your brand. That means domain mapping so that the customer experience centers on your website, not that of the help desk solution vendor. Look for Cascading Style Sheets (CSS) that allow you to modify layout, colors and fonts to meet your brand specifications. And ensure that the solution you select enables multi-language and multi-time zone presentation to fit your global marketing strategy.

Case Study: SAP OnDemand

When SAP recently launched a new business intelligence product, SAP OnDemand Operations Manager Paul Bicknell saw a five-fold surge in support requests from both internal and external customers. Zendesk allowed his team to effectively manage the increase.

"Within 15 minutes we had our customized help desk running and were able to receive tickets," said Bicknell. "You are able to learn as you go. You can use Zendesk right away then grow into the advanced features comfortably and at your own pace."

With Zendesk, the team quickly implemented automatic notifications, email updates, and email-based incident management and started a meaningful dialogue with SAP's OnDemand customers, who noticed the improvement right away.

Now that Bicknell's team is easily managing the flow of customer requests, he is thankful he found Zendesk.

"We had to find something just to keep our heads above water. Zendesk was more than a life preserver, it was like washing ashore on an island resort."

Case Study: Scribd

Based in San Francisco, CA, Scribd is the largest social publishing and reading site in the world. The company makes it easy for anyone to share and discover informative, entertaining, and original written content on the web and mobile devices.

With support requests from teachers, students, aspiring authors and major publishing companies, Scribd's community support department has its hands full. "Our support department was going to fall apart if we didn't put a trouble ticket system in place," said Jason Bentley, director of community support at Scribd.

Scribd implemented Zendesk within a day and a half and gave the system the same look and feel as the Scribd website. Today, Scribd handles up to 600 support tickets per day—on everything from lost passwords to copyright notices— through their Zendesk.

Thanks to Zendesk automation, incoming tickets are automatically reviewed by keyword and routed to the appropriate support technician for immediate attention. This efficiency enables Scribd to resolve about 95% of its support tickets within one day. The company also generates more than 100 standard responses to frequently asked questions using Zendesk macros to cover all basic form responses, and to add tags that classify tickets.

"Zendesk's automatic routing is a lifesaver that's eliminating countless hours of work," said Bentley. "It ensures that each ticket will be handled by the most qualified technician, which means we can deliver better, faster service."

List of Key SaaS Help Desk Requirements

SaaS Help Desk Requirements	Zendesk	Other
1. Implementation		
No setup fees	✔	
No hardware requirements	✔	
No software installation	✔	
2. Ticket Management		
Unified search	✔	
Custom ticket fields	✔	
Agent and customer interface	✔	
Real-time agent collaboration	✔	
Group customers by organization	✔	
3. Multi-Channel Support		
Email	✔	
Web	✔	
Social Media (Twitter)	✔	
Online Chat	✔	
Community Forums with User Voting	✔	
iPhone	✔	
BlackBerry	✔	
Android	✔	
4. Integration		
Pre-built Integrations	✔	
Analytics (GoodData, Google Analytics, etc.)	✔	
Mobile Apps (Android, BlackBerry, iPhone, etc.)	✔	
Authentication (LogMeIn, Microsoft, etc.)	✔	
CMS (Drupal, Joomla, etc.)	✔	
Communication (LiveChat, MailChimp, Yammer, etc.)	✔	
CRM (Salesforce, NetSuite, etc.)	✔	
ECommerce (Magento, osCommerce, etc.)	✔	
Management (JIRA, Freshbooks, Harvest, etc.)	✔	
Custom integrations via REST, JavaScript, Email API	✔	
5. Reporting		
Pre-built dashboards	✔	
Custom reports based on keyword tags	✔	
Custom reports based on business hours	✔	
Data portability via CSV exports and XML backups	✔	
Tickets by status, priority, type, group or assignee	✔	
Advanced analytics to track customer satisfaction	✔	
Advanced analytics to track agent performance	✔	
Advanced analytics to track ticket resolution times	✔	
6. Customization		
SSL Domain mapping	✔	
Full CSS customization	✔	
Multi-language and timezones	✔	

Conclusion

These six requirements – fast, painless implementation; easy ticket management; multi-channel support; comprehensive reporting; pre-built and custom integrations; and brand customization – are a litmus test for SaaS help desk software in today's fast-changing world. If you adopt a solution that support these requirements, your support agents will thank you for making their jobs easier – and your customers will love you for giving them great support.

How to Get Started

Visit us to sign up for a free 30-day trial with full access to all features at www.zendesk.com/signup. Contact Zendesk to get started at +1 (415) 418-7506 or email sales@zendesk.com.

About Zendesk

Zendesk is a leading provider of web-based help desk software that is reinventing how companies engage with their customers. The company serves more than 5,000 businesses large and small, including Groupon, MSNBC, Twitter and Rackspace Cloud. Zendesk products are easy to customize, integrate, and use so companies can quickly start offering better customer support. Founded in 2007, Zendesk is funded by Charles River Ventures, Benchmark Capital and Matrix Partners. Learn more at www.zendesk.com.