

Zendesk for Employee Experience

How IT leaders use Zendesk for employee experience



We'll show you how to use Zendesk internally to improve workflows, increase visibility and share knowledge.



zendesk



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How do you embrace the future of work and solve problems in the present?

IT teams have a lot of responsibility.

Employees count on you to answer their questions and troubleshoot their devices. Leaders are looking to you for strategic guidance on digital projects. Meanwhile, your team is on the hook for protecting organisational data and meeting compliance requirements.

On top of that, employees are asking for greater flexibility to work where and when they want. This poses a challenge to organisations which have been slow to take on new technology projects and now need to accelerate their timelines in order to deliver on expectations.

Tickets filed by corporate employees jumped

31%

last year – nearly double the rates seen by B2B and B2C companies.

Zendesk Employee Experience Trends Report 2022



To remain competitive, you need technology that can keep up with the times.

This is not your grandparents' workplace. Your employees will expect best-in-class technology and service, because that's what they're used to experiencing from the brands and businesses they interact with in their daily lives.

How Zendesk can help

With Zendesk, you can do more than simply react to incoming questions. You can solve problems consistently, securely and at scale. You can create a culture of information sharing across your organisation.

In this guide, we'll show you how to use Zendesk to power your IT help desk to:

- Help employees when and where they need it
- Gain efficiencies with AI-powered workflows
- Use data to demonstrate the impact of your work
- Build your ideal help desk by adding apps, integrations and customised workflows



01 Help employees when and where they need it

When employees can work from anywhere, you need to make your help desk available everywhere.

Give employees multiple ways to seek help:



Help centre

Empower employees to find their own answers any time they need them, and you can easily share knowledge in one place without duplicating efforts.



Phone and SMS

Talk to your employees via the little computer in their pocket. This makes it easier to get support no matter where they are – at home, in a coffee shop or in the office.



Messaging

Make support feel more friendly and conversational with live chat and messaging apps, without sacrificing visibility or security.



Chatbots

Use artificial intelligence (AI) to respond to routine questions and complete basic conversation flows, so you can focus on more complex problems that need your attention.



How to get started with Zendesk Guide:

Build a help centre yourself using Zendesk's tools and templates, no design team needed. We have a [standard help centre theme](#) that can be customised with your brand colours and logo, or you can elevate the look and feel by using one of our [design-friendly themes](#).

To get started building your help centre, follow these steps:

- Sign in to Zendesk Support as the account owner
- Click the Products icon (☐☐) in the top bar, then select Guide
- Click Get started

See the Zendesk Help Centre for more details on [how to set up your help centre](#).



Your knowledge is safe with us

Employee help centres can be incredibly helpful for sharing information, but they need guard rails. That's exactly what Zendesk provides.

☐ Define roles and privileges

Set clear roles within your internal support team, so you know exactly who can create and edit content as well as remove permissions when employees leave or transition roles.

☐ Limit who can view help centre content

Create a password protected help centre that only signed-in employees can see and further restrict based on user type. See here for instructions on [restricting help centre access](#).

☐ Comply with data and privacy protection laws

You have certain obligations to protect employees' privacy, which could include removing someone's personal information from help centre articles or comments. See here for more information on [meeting privacy obligations](#).

Gain efficiencies with AI-powered workflows

Carrying the workload of a much larger team? Automation can help fill the gap, so you can focus on high-impact work.

What's the deal with bots? Are they even worth it?

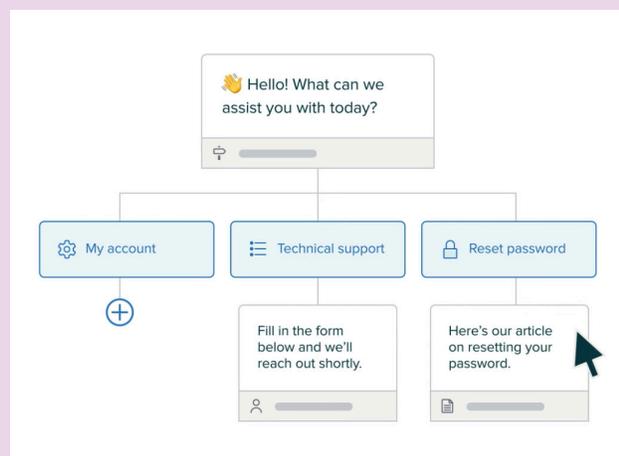
We think so. First, they can handle some of your most routine, repetitive questions. They're a great option for small teams supporting a wide range of needs. Second, having an always-on bot means you can provide 24/7 assistance, no matter when or where your employees are working.

[Answer Bot](#) is Zendesk's conversational AI. We built it using a language model that allows Answer Bot to better recognise slang and uncommon vocabulary (like branded product names), making it easier to get a helpful answer on the first try.

HOW IT WORKS

Flow builder for Answer Bot

Use our Flow Builder to map conversations between Answer Bot and your employees. Once you build a flow, you can publish it in multiple languages. All this is possible in just a few clicks, without writing a single line of code.



Why you should make Answer Bot part of your IT team

Stem the tide of incoming questions

Use Answer Bot to help field basic FAQs and then let the bot escalate issues to your IT team, if they can't be solved in a few simple steps. Deflecting simple requests with a bot can take some of the pressure off your team and give you more time for focused work.

Answer employees' questions before they even ask

Answer Bot can provide automatic article suggestions based on the information provided in a web form or email. If the employee finds what they need in the list of suggested articles, then they can close their ticket and get on with their day.

- [How to configure Article Recommendations for email notifications](#)
- [How to configure Article Recommendations for web forms](#)

How to activate Answer Bot:

- In **Admin Centre**, click the **Channels** icon (↔) in the sidebar, then select **Bots and automations > Article recommendations**
- Click **Activate Answer Bot** or **Try Answer Bot for 30 days** to activate your 30 day unlimited trial

Find step-by-step instructions in our [quickstart guide to Answer Bot](#).

How to optimise your help centre articles for Answer Bot

Answer Bot crawls your help centre articles to identify relevant information based on keywords and phrases. Keep this in mind when creating new help centre articles or updating existing articles.

✔ Titles:

Try to title your articles using language and phrasing your customer might use in a search, or in a ticket description. For example, "How do I reset my password?" or "Resetting a password"

✔ Introductions:

Answer Bot weighs the first 75 words of an article most heavily, so including relevant keywords in your introduction is key. Try to start your articles with clear, focused paragraphs.

✔ Topics:

Create bite-sized articles that address single, narrowly focused topics, rather than long articles with multiple sections that relate to the same topic.

03 Use data to demonstrate the impact of your work

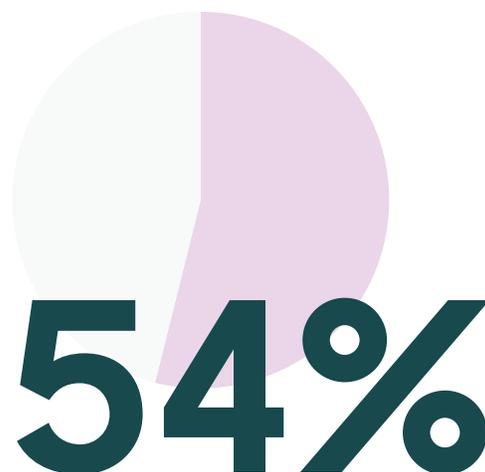
Track performance metrics in Zendesk, so you can celebrate wins and identify areas for growth.

Now more than ever, all eyes are on IT.

Your team has the power to shape the future of work for your company, and higher-ups will be looking to you for actionable insights that can move the business forward. They need to hear from you to understand what's working, what's not and where change is needed.

With Zendesk's reporting and analytics capabilities, you'll have greater visibility into usage trends, agent performance and employee satisfaction ratings.

 Watch: [Introduction to analytics in Zendesk](#)



of internal support team members say their visibility with senior leadership is higher than ever before

Employee Experience Trends Report 2022

Which metrics matter most?

Good question. It's different for every org, but these are a few things you'll probably want to track no matter what:



When are your employees most likely to reach out (days and times)?

This is good to know so you can plan your service desk coverage (and lunch breaks). It also helps to know your peak times when planning for system maintenance and downtimes.



What types of questions are most common?

If you receive a lot of requests on a certain topic, that could indicate an area where you need to create or improve help centre content.



How fast are you able to respond to employees' questions?

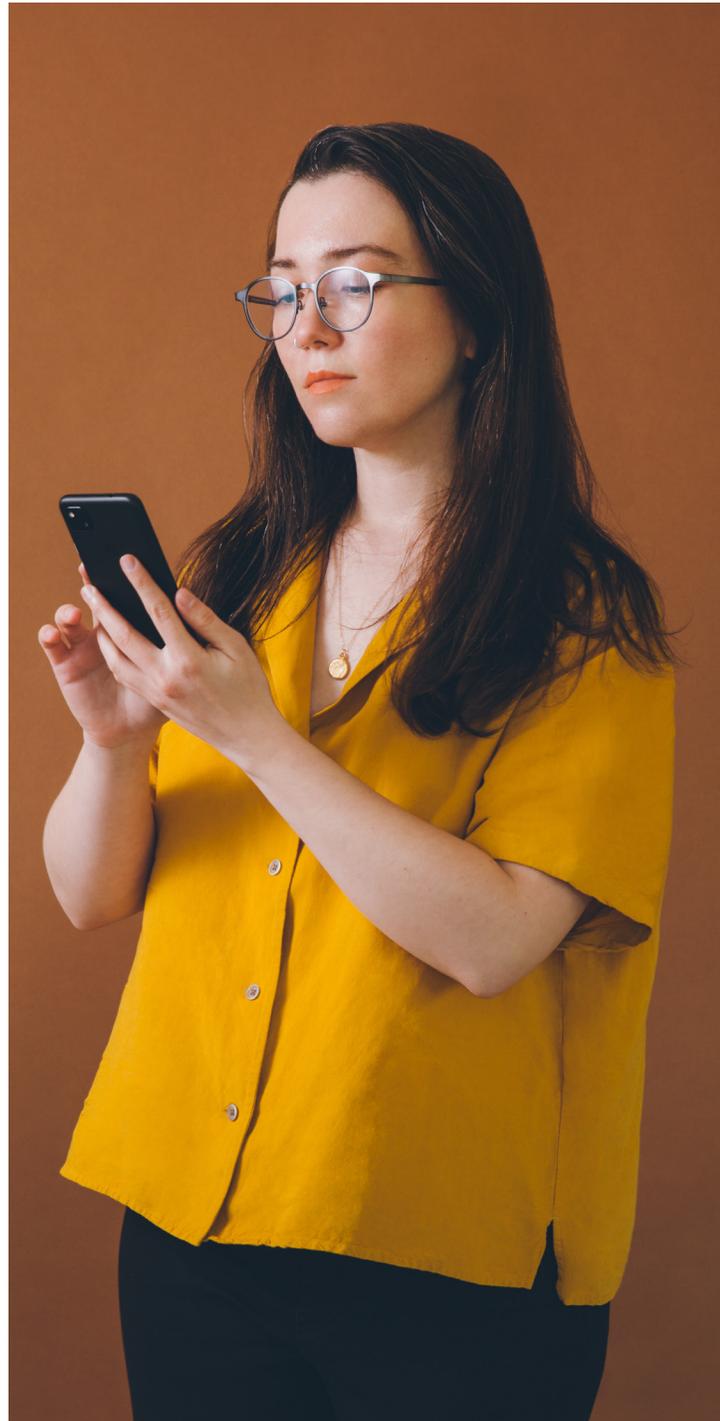
Employees expect fast answers, especially if they have a technical issue. Monitor your response time to make sure that you're staffing your service desk appropriately to meet employee demand.



Are your employees satisfied with the service you provide?

Satisfaction metrics can give you a quick read on how well you are meeting employees' needs. Pay attention to any negative comments and develop a process for handling them.

See our help centre for more information on [using Zendesk Explore for analytics and reporting](#).



Build your ideal help desk

Zendesk can meet you where you are today and help you build for the future of work.

Not sure what the future holds? Neither are we.

No matter what happens, you've still got daily problems that need to be solved: lost passwords, slow computers and system maintenance. We can help you tackle the day-to-day with a little more finesse while also giving you the data you need to prove the impact of your work.

How to use Zendesk for your IT help desk:

Employee onboarding	Employee service	Asset management	Change management
Assist with technology setup and educate on security protocols	Field employee questions and facilitate IT service requests	Keep a digital paper trail of issues related to company provided devices	Share information regarding new tools and implementations

In the midst of a “Great Resignation”, organisations are under pressure to reimagine their employee experience and your IT service desk shouldn't be overlooked. Everyone from interns to C-Suites relies on the service you provide, so the potential impact is significant if you can provide exceptional service consistently and at scale.

The beauty of Zendesk is that you can change it as much (or as little) as you like – add, subtract, simplify, modify and make it your own. Rely on our out-of-the-box offerings or use your own code. We provide the tools, but you're the architect.

So once you're ready to try it, what should your next move be?

How to set up Zendesk for your IT help desk

1 Structure your team

First, you'll want to organise your team and assign roles. You can create Groups of agents based on the channels they support (e.g. email or chat) or the functions they perform (e.g. technical support or security/compliance). Groups matter because you can use them to route tickets and prioritise incoming requests. Create groups with a clear purpose and give them a name that matches their function.

To create a group:

- In the **Admin Centre**, click the People icon  in the sidebar, then select **Team > Groups**
- Click **Add group**
- Enter a group name and select the agents you want to add to the group
- If you want this group to be the default group that all new agents are added to, click **Make default group**
- Click **Create group**

2 Create customised ticket fields

A ticket is a record of the conversation between employees and IT. You can use ticket fields in Zendesk to capture important information about the ticket, such as the type of issue, employee designation or department. This will be important later on when you want to track and report on ticket requests by type.

Zendesk includes a default set of fields for your tickets and you can add customised fields as needed. See here for instructions on [creating customised ticket fields](#).

Ticket tip:

It's almost always best to use drop-down fields when possible. Drop-downs allow you to have clean reporting, apply simple business rules effectively, and simplify the experience for your agents and end users.

3 Automate repeat actions with triggers

You can create triggers to automatically process tickets and save time. Triggers are **event-based** business rules you define that run immediately after tickets are created or updated. At their core, triggers are cause and effect statements. If a ticket meets a set of conditions, **then** an action is performed.

Zendesk comes with default triggers, which you can add to or remove based on your business needs. Here's [how to set up a trigger](#).

To access your triggers:

- In Admin Centre, click the Objects and rules icon (🔧)
- Select **Business rules > Triggers**

Default trigger best practice:

- ✓ **Do not deactivate all triggers.**
Triggers are the mechanism that lets your employees and help desk team know where an issue stands and what action is needed.
- ✓ If you want to change a default trigger, **clone it and create a new trigger based on its structure**, then deactivate the original default trigger.
- ✓ Consider deactivating **“Notify all agents of received request”** to avoid clogging your inboxes unnecessarily.

4 Choose your apps (or build your own)

We want Zendesk to work for you, so we partner with companies like Slack, JIRA and more to make sure that Zendesk plays nicely with the tools you already know and trust. You can also [develop your own customised apps](#) to integrate data from external sources, like an employee database. See our [developer tools](#) for more information on how to build customised solutions for Zendesk.

To install apps in Zendesk:

- Search apps and integrations at zendesk.co.uk/apps
- Click install and follow the instructions
- To configure your apps in Zendesk, go to **Settings > Integrations > Apps**



Use case	Apps
Getting started	Help Desk Migration, Knowledge Capture
IT teams	Okta, PagerDuty, JIRA, Watchman Monitoring, EZOfficeInventory, AssetSonar
Collaboration	Slack, Microsoft Teams, Zoom, PandaDoc, Go2Assist Remote Support, LumApps
Project management	Asana, Trello, SweetHawk, Myndbend Process Manager Lite, Cloudset
Training and performance	Tymeshift Workforce Management, Kaizo, Klaus, Geckoboard, MaestroQA
Feedback	SurveyMonkey, SweetHawk, Qualtrics, Stella Connect, Harvestr

5 Ask for employee feedback

It's easier to understand employees' needs when you can get their feedback directly. Zendesk has satisfaction surveys already built in, and these can be customised. You can also use apps like SurveyMonkey or Stella Connect to collect feedback and identify areas for improvement.

To enable customer satisfaction ratings in Zendesk:

- Click **People** () in your Admin Centre
- Select **Configuration > End users**
- Click the Satisfaction tab, then click **Allow customers to rate tickets**
- Click **Save** at the bottom of the page

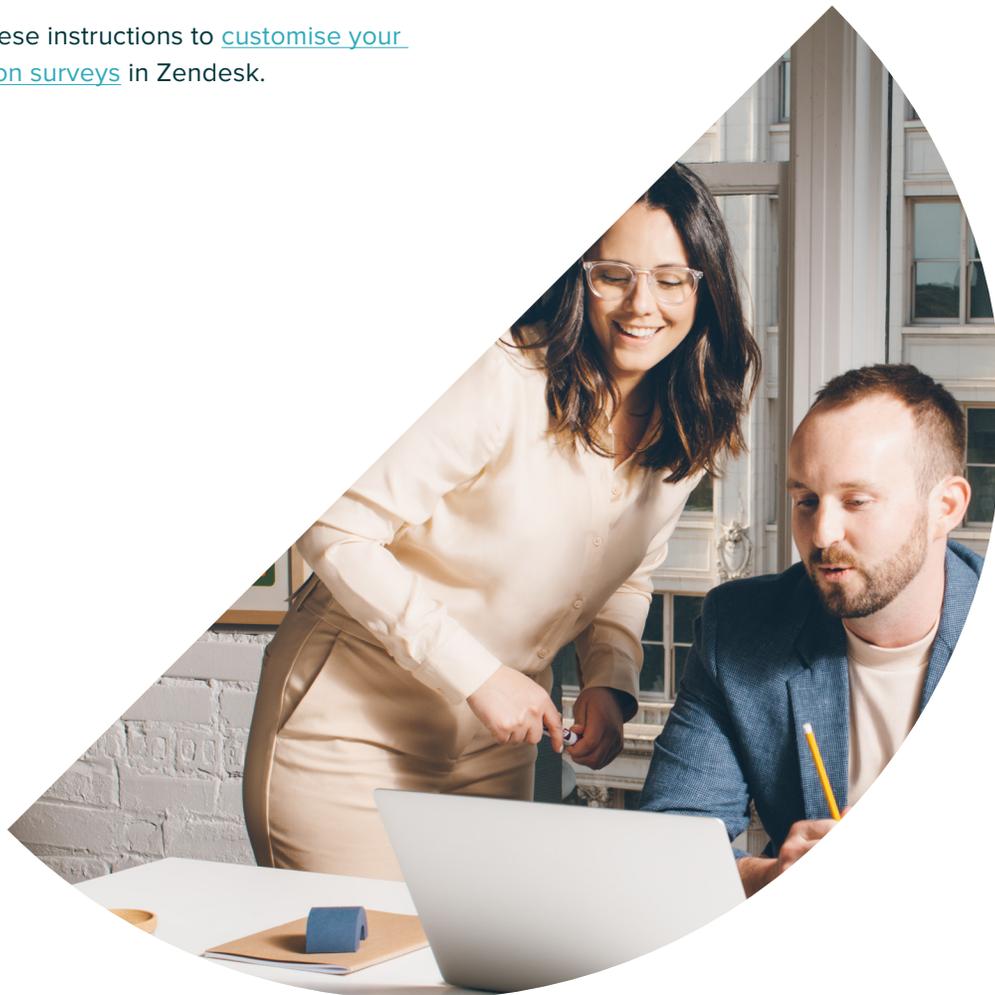
Follow these instructions to [customise your satisfaction surveys](#) in Zendesk.

6 Build for the future

Do you dream of a smart help desk powered by artificial intelligence? Can you picture providing highly personalised service in the Metaverse? Or maybe you simply want to achieve inbox zero. With Zendesk, you can feel confident that you're building on a foundation of powerful tools that can get where you want to go, one step at a time.

Need inspiration? Tap into our [Community](#) for practical advice from experienced Zendesk users.

For more information on how to set up Zendesk Support, see our [quick launch guide](#).



Zendesk: A smarter way to help your employees

The new world of work demands intelligent digital experiences.

Employees need service-from-anywhere and IT teams need modern solutions that can actually get the job done.

Zendesk checks the boxes. 

[Get started with Zendesk for IT](#)

