How software and cloud services companies deliver exceptional technical product support
Technical support engineers in the Tech industry have their hands full, especially in the software and cloud services sector. Customer inquiries run the gamut, from basic account management issues to more complex technical issues, sometimes the result of either critical system outages or just plain bugs in the system.

In addition, your company must support all tiers of service across a wide range of customers, from freemium to Premium. Inquiries can come from end users as well as from administrators, developers or other types of super-users. If your company offers a free trial, then you also need to accommodate both prospects as well as existing customers. Finally, your support team needs to ensure that new customers have a positive first impression of your company during their 30/60/90-day onboarding window. It’s a daunting task for any customer service team.

Fortunately, there is a clear blueprint that your company can follow to ensure that you’re delivering exceptional technical product support. By building and implementing a comprehensive technical support strategy, you can

- Reduce customer churn and drive high levels of net retention
- Achieve significant increase in CSAT scores
- Meet or exceed SLA adherence goals

This strategy encompasses a tiered support approach and is designed to achieve scale by using a range of self-service tools that mitigate the need for implementing a true Tier 1 help desk. This approach then allows your highly-trained support engineers to focus on more involved technical issues. Using a robust set of tools, Tier 2 support engineers can easily tackle and resolve basic break/fix and troubleshooting inquiries. That said, they may still need to escalate more complex technical issues to the Tier 3 technical support team.

Let’s take a look at how Zendesk can empower your technical support team to deliver exceptional customer service and create clear differentiation in your business.

- Deflect Tier 1 requests through self service
- Accelerate Tier 2 product and service support
- Escalate Tier 3 tickets to new heights
- Use dynamic analytics to optimize your technical support operations

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Deflect Tier 1 requests through self service

Customer support inquiries are becoming more complex as the CX team seeks to provide support for an increasingly sophisticated set of products and services. By deploying a self-service strategy to deflect some of the most basic inquiries, technical support teams can keep their heads above water while still providing a high standard of service for their customers.

For instance, a comprehensive set of self-service tools can help your customers activate and onboard new services, assist with account and password management issues and even provide a basic level of troubleshooting support, thereby mitigating the need for your support team to be involved. If done right, self-service can help deflect up to 75-90% of these Tier 1 tickets.

There are three critical elements to a robust self-service solution:

- **AI-powered bots** from Zendesk can perform conversational flows and serve up relevant information – e.g. subscription status, product information, how-to-guidance, etc – to customers. If a customer doesn’t find the answer they need, bots can then collect and consolidate relevant customer info – loyalty status, topic of inquiry, language, etc – to ensure that inquiries are intelligently routed through an assisted channel to the most appropriate agent and that the agent has the context needed to provide high-quality support, thereby ensuring a seamless handoff.

- **Custom multi-branded help centers** make it simple to organize your library of FAQs and how-to guides. Product managers, developers, and technical support managers can add content too, including feature demos, tips and tricks, patch and release notes, etc.

- **Technical community forums** can serve as a crowd-sourced knowledge base where your customers can connect with each other, share resources, and problem-solve together. The information gathered through these communities can then be formalized in your company’s knowledge base so that customers and support engineers alike can benefit in the future.

For a more detailed discussion on this topic, see [how other software and cloud service companies are scaling their CX operations through self service](#).
As the world’s leading development platform for interactive real-time 3D content, Unity supports creators across the gaming, animation, automotive, and architecture industries. Individuals and enterprise-level companies alike are drawn to Unity’s scalable software solutions, which enable faster production for film projects and rapid growth when a multiplayer game gets popular.

From 2019 to 2020, Unity experienced a period of explosive growth with a 56 percent increase in new tickets coming in through Zendesk. Anticipating a squeeze on resources and workflows, the company needed ways to scale support without taking on the burden of more salaries and staff.

The team decided to add Zendesk chatbot to web forms and later email. Now, when a user submits a question, they either get an immediate answer or relevant FAQ suggestions from the bot.

“With Zendesk, we’re seeing more resolutions in web form and email without human assistance. Last year we deflected almost 8,000 tickets due to self-service enabled by Zendesk. That amounts to about $1.3M saved due to the reduction in tickets.” says David Schroeder, Senior Manager of Service Support at Unity.
Accelerate Tier 2 product and service support

Tier 2 tickets generally require a higher level of technical support and, optimally, should take 30 minutes or less to resolve. Support engineers need to have in-depth knowledge of your products and services as well as troubleshooting skills and tools in order to knock down technical inquiries – e.g. performance issues, installation or integration issues, etc. That’s not to say that some Tier 1 tickets won’t sneak through to this team, but if you’ve optimized your self-service infrastructure then a significant percentage of those tickets should have already been deflected.

With this in mind, there are several key capabilities that you should put in place to optimize mean time to resolution (MTTR) and, ultimately, to drive your CSAT scores and net retention rates through the roof.

→ 360-degree customer views
→ AI & Automation
→ Status Monitoring
→ Collaboration Tools
→ Remote Support
Deliver personalized support with 360-degree customer views

In order for support engineers to deliver an exceptional customer experience, they first need to understand the customer they are serving. Personalized support is the holy grail, and software and cloud services companies should strive to provide what feels like VIP-level support regardless of tier, thereby driving brand loyalty and customer retention.

Ninety percent of customers are willing to spend more for personalized experiences, but only 32% of agents in the technology industry say they’re very effective at finding the information they need to meet those expectations. (CX Trends - Technology Report).

Zendesk meets this need by providing an integrated, omnichannel view of customers so that support engineers have complete visibility to the conversational history of each and every customer across all support channels. Zendesk complements this capability by providing both free and paid out-of-the-box integrations, built with our partners and community.

For instance, dynamic two-way integrations with CRM systems allow you to sync customer data in real time, including custom objects, so your support team can access and update full customer profiles from within the unified agent interface. Through these integrations, sidebar apps appear next to the agent’s live ticket window so that they don’t need to open apps in separate browser tabs.

The Zendesk Apps Framework (ZAF) extends this capability even further by enabling you to build custom applications using open and flexible web technologies. Because the apps run in iframes, you can build apps with any technology you like and place them anywhere within the agent interface, typically in either the top navigation bar or in the sidebar.
You can build the app using any client-side or server-side technology you like. If you only use client-side technologies like HTML, JavaScript, and CSS, you can let Zendesk host the app. If you prefer using server-side technologies, you can host the app on a remote server. The framework also gives your apps access to various product resources using our Core Apps API or the ZAF Client API.

The flexibility of ZAF enables you to customize the breadth and depth of customer information that you provide to your support engineers and extend the value they can deliver to your customers. Here are just a few examples.

**ORGANIZATION INFO**

- Increase support engineer visibility and understanding of the customer’s business
- Identify key individuals to help with resolving issues
- Provide visibility into customer entitlements and create opportunities to deliver additional value to the customer

**INDIVIDUAL INFO**

- Increase agent visibility and understanding of the individual and their role within the business
- Highlight the experience this individual has with your product or service and give your agent the ability to proactively engage beyond the current support issue
- In this example, the agent sees that Travis has not yet started the Cloud Training Course that is required for Admin 301 Certification. By clicking on “Notify,” the agent triggers a macro that sends an email reminder to the customer.
While it’s critical that your support engineers know and understand their customers, it’s just as important that they have at their disposal a robust set of tools that will help them efficiently and successfully resolve a wide range of technical issues. Let’s explore some of these tools.
Box was founded on a simple, powerful idea: people should be able to access and share their content from anywhere. Since 2005, Box has helped more than 41 million users and 74,000 companies do just that. They are a leader in cloud content management and file sharing services.

Support engineers at Box were challenged by the fact that key customer data lived in disparate systems, thereby creating a time-consuming and tedious retrieval process as the team had to jump from system to system to copy and paste vital information when solving tickets. Additionally, Box’s trending issues – such as service outages – were stored in another system, leaving agents no visibility into existing problems an organization might be dealing with.

Using Zendesk APIs, Box was able to integrate data from their sales CRM and trending issues database right into Zendesk. They then created a custom sidebar app using the Zendesk Apps Framework (ZAF) that would surface the data instantly and allow agents to tag tickets to specific issues. The result? Since the app has been implemented agent efficiency has skyrocketed and Box has increased trending issue identification by over 50%.
Empower support engineers with AI and automated workflows

Customer service has reached a tipping point, where AI has the potential to revolutionize how companies engage with customers at all levels. You’ve already heard about innovations like ChatGPT, the AI chatbot released late last year, and seen new applications for AI show up in the world of CX.

But the kind of AI you need has been out of reach. That’s because many AI solutions out there in the market are slow and expensive, requiring heavy IT spend, lengthy implementation processes, and highly specialized resources just to get started. Others are incomplete, designed to work on only narrow parts of your CX. As a result, most CX leaders say their plans for AI are ad hoc, not strategic.

With Zendesk’s new Advanced AI, we’re building a different kind of AI to help. It’s enterprise-grade AI for customer service that allows you to tap into powerful intelligence in minutes, not months, and put it to work across your CX operations. Within your customer service center, our intelligence lives at your technical engineers’ fingertips, working alongside our easy-to-use tools to put every agent on the fastest path to resolution. And by continuously learning your CX organization, it allows you to keep getting better at serving your customers. Let’s take a deeper look.

Harnessing the full force of AI to optimize CX operations

The power of AI lies in its ability to perform intelligent triage, using intent detection, language detection, and sentiment analysis to classify and prioritize incoming requests and power downstream workflows based on these insights.

For instance, these AI-powered insights can suggest to your technical support team a recommended set of macros that they can use to quickly and seamlessly resolve the customer’s particular issue, integrated within the Agent Workspace. Another example would be recommending an upgrade to address a performance limitation that a customer is facing.
Like a co-pilot, this Smart Assist capability helps agents do their jobs more efficiently, removing guesswork and repetitive manual tasks. This makes interacting with customers easier with intuitive tools and suggestions that are accessible, which reduces pressure on agents who are experiencing higher volumes of requests and customers who are facing more complex challenges. Furthermore, Zendesk Advanced AI can analyze the constant stream of inquiries coming into the technical support teams and suggest new macros to administrators based on trends. This enables your business to better plan operations, collaborate across departments and identify improvement opportunities supported by data for more efficient CX operations.

Sentiment is a prediction of how positive or negative a customer feels about the request they’re submitting to your team, along with a confidence level in that prediction. The prediction is made based on the text of the customer’s first message and is grouped into one of several categories, from “very positive” to “very negative.” Zendesk’s machine learning model is specifically calibrated for customer service. This means that a ticket isn’t assigned a negative sentiment just because a customer is having a technical issue, can’t find the information they need through your self-service tools, or some other similar “negative” situation.

Instead, the model is tuned to analyze sentiment with the assumption that the customer is contacting customer service because they have an issue that needs to be addressed.

Intent is a prediction of what a particular ticket is about, including a confidence level in that prediction. Administrators can easily establish a taxonomy of terms and topics that are used in the prediction analysis. Natural language processing (NLP) is also used to enhance and enrich the machine learning model.

Intelligent triage is a critical feature that ensures that tickets are being routed to the right agents at the right time. For instance, tickets can be automatically routed to technical support engineers who are knowledgeable on specific products or services or who have been trained as subject matter experts. The language detection feature also ensures that tickets are appropriately routed across a multi-lingual support staff.
Everyone is familiar with websites that allow you to buy and sell goods and services. But what about a software platform that can help you sell your knowledge? Enter Kajabi, the leading platform for knowledge entrepreneurs and creators. Experts create online video courses, podcasts, and communities in their specialties, while buyers can learn and adopt new skills and participate in conversations with like-minded learners.

When the 2020 global pandemic upended people's livelihoods and routines, Kajabi found itself with an enormous increase in members looking to leverage its online platform, nearly quadrupling its customer support queries. The company had already started looking into AI, machine learning and self-service as part of its forward-looking CX strategy, but the surge in volume pushed the team to swiftly take action sooner than planned. They found their answer in Zendesk.

As Kajabi has grown, the AI strategy has delivered numerous benefits to the company's customer service team. In particular, AI-based data collection and analysis has had a significant impact on business.

“When you have a smaller team, you can easily share among each other the feedback and learnings you are seeing from support tickets,” says Jared Loman, VP of Customer Experience at Kajabi. “But when you’re handling thousands upon thousands of tickets, you’re just not having those same conversations anymore.” “AI gives you a better way to understand and keep a pulse on what is happening.”

For example, the Kajabi team was surprised to find that a large number of tickets were coming in for a settings page in Kajabi’s software application.

“The amount of tickets that were coming in for that particular area blew my mind because it's fairly simple and it doesn't seem like a high traffic area of the app,” says Loman. “So AI exposed an opportunity for us to get sniper-targeted on a support area for learning and help that I don’t think I ever would have anticipated.”
Leveraging the skill sets of support engineers

With Zendesk, you can also combine intelligent triage with other powerful skills-based routing tools and workflows. With this capability, you can automatically route tickets based on agent ability. Of course, this requires an understanding of what the customer is looking for and the expertise that will be required to address customer issues.

With skills-based routing, you can set up “skills” and associate each one with individual agents. For each skill, you first define a set of ticket conditions, then configure a view that identifies which tickets match the skills of individual support engineers.

Once skill sets have been established within the Zendesk platform, tickets will automatically be routed, either based on tags that have been manually applied to a ticket (for instance, as part of a Tier 2 to Tier 3 escalation process) or through tags that have been auto-generated via intelligent triage.

Working with problem and incident tickets

Throughout the software and cloud services industry, critical issues can happen any time and cause an avalanche of service calls. In these cases, support engineers can use Zendesk problem and incident tickets to manage the crush.

Once a support engineer identifies a service interruption or critical software bug that’s causing multiple support tickets, that agent can classify related incident tickets and link them to a master problem ticket. Then, instead of handling each ticket separately, the agent can simply resolve the problem ticket in order to resolve all of the related incident tickets in bulk. All customers who have been affected by the service interruption will then be alerted through a bulk notification service.

During this process, system administrators can also use detailed incident reports to track progress in real-time. These reports can also guide your debriefing process after the incident is resolved. With data in hand, your team can identify key learnings and opportunities for improvement.
InVision delivers outstanding support on a solid technical foundation

The first ever all-in-one product design platform, InVision makes it easy for engineering and business stakeholders at companies such as Amazon, HBO, Capital One, and Kayak to collaborate during their design process. Like any SaaS product, things don’t always work perfectly. But the inevitable hiccups aren’t reflected in the customer satisfaction scores.

At the beginning of 2015, InVision switched its CX platform to Zendesk. The company was growing fast, and so was the number of tickets in the support queue. InVision now deploys Zendesk APIs, ZAF, help center, AI chatbot, community and seamless integrations with Jira, Salesforce and GitHub to deliver first-class service to their customers. InVision’s customers don’t limit themselves to expressing their appreciation for the support team by voting thumbs up or thumbs down on the follow-up survey. “Your support so far has proved to be the best I have ever encountered when using a tech product or service,” one customer said.

Sean Kinney, InVision Senior Director of Support, says that Zendesk’s problem and incident ticketing feature enables InVision to track every bug and feature request its customers encounter; problem tickets are kept in sync with the associated Jira issues via the Zendesk JIRA integration so that the support and engineering teams can work in their tool of choice while accessing the same data. InVision’s support group also escalates tickets via Zendesk to the company’s finance, security, and legal departments. The results speak for themselves.
Automating multi-lingual conversations within the Agent Workspace

In today’s technical support world, it is table stakes to be able to support your customers across many languages. As such, it’s essential that you implement some level of automated translation. This capability is particularly important for multinational companies who need to operate across countries and languages. In most locations, hiring for very specific languages can be tough, expensive and time consuming. Eliminating this pain allows them to focus on core objectives.

With Zendesk, agents can choose to translate incoming and outgoing messages across all Live Chat and messaging channels. Zendesk supports this capability across 134 different languages.

If you’d like to move beyond the native capabilities of the Zendesk platform, you can also add out-of-the-box integrations like Unbabel to your translation engine. Powered by state-of-the-art AI and a worldwide community of translators, Unbabel delivers translation at enterprise scale. This app helps you serve customers in any language, with fast, native-quality translations of your customer support tickets in Zendesk. In addition, you can customize the solution by incorporating your company’s glossaries, brand terminology and tone of voice. Finally, the self-learning nature of the Unbabel system means that it produces better results over time.

You gain several advantages by taking this approach:

- Hire support engineers for talent rather than language ability
- Launch in new markets without seeing the friction and complexities that multi-language support might create
- Ensure that the best support agent for a ticket is working on it, rather than the agent who speaks the language of the customer
- Ensure that your Help Center is available in all languages at the click of a button.

You can watch a short overview of this powerful language translation capability here.
As you can see, Zendesk’s Advanced AI platform, combined with skill-based routing, problem and incident ticketing and automated translation, lets your technical support engineers work smarter and faster and streamline resolution of technical tickets. But there’s more.

**Status Monitoring**

As your Tier 2 support engineers deal with problem and incident tickets, you can give them a leg up by making it easy for them to quickly assess the health of their customer’s software or service instance. As discussed previously, you can use the Zendesk Apps Framework to surface high-level status information to your agents through a custom application.

Another approach is to use an off-the-shelf status monitoring application like Statuspage from Atlassian. This out-of-the-box Zendesk integration provides agents visibility to incidents from within the Agent Workspace.

When your agents are viewing tickets in Zendesk, they can quickly and easily see when new incidents occur or maintenance is underway. They can also obtain more details of incidents, making them more aware of any service disruptions that may impact your customers. Support engineers can then easily drill down into incidents or service degradations by viewing the Statuspage app either in the top navigation bar or in the sidebar and can even post status information directly into a ticket by clicking Add to Comment in the sidebar app.

Extending this capability even further for B2B SaaS instances, you can display system status information directly within your customer’s login portal. In this case, end users and/or system administrators can quickly and easily determine whether or not there is a known issue with their instance, thereby mitigating the need for them to reach out directly to your technical support team.
Extend support with powerful collaboration tools

Your support engineers will sometimes need a little help from others in order to address a customer issue. For instance, an agent may need to reach out to the Finance team to help clear a payment issue for a customer account or to a Product Manager to clarify a feature on the software roadmap.

In these cases, agents can collaborate on tickets within the Zendesk Agent Workspace without leaving the ticket. For example, the support agent can start up a Side Conversation with just about anyone, across internal and external organizations. Support agents can also use Light Agents to give limited access permission to key team members so they can stay informed about tickets and provide expertise via private comments, if necessary. This video gives a high-level overview of these collaboration features.

This native capability in Zendesk is easily extended with out-of-the-box integrations with Slack and Microsoft Teams. Through these integrations, support agents can easily launch Side Conversations through your company’s primary messaging platform. Individuals who have been tagged in private or public channels can then participate in conversations as well as receive notifications and updates on tickets.

Furthermore, you can extend your external support reach by using either Slack or Microsoft Teams to establish an additional technical support channel for your customers. Through this additional channel, customers can directly interact with your company through chatbots and/or live interactions with your support team. Your customers can also create formal Zendesk tickets within these platforms. Whether a customer reaches out through Slack or Microsoft Teams, through a web form or web widget within your customer’s login portal or through email, all conversations will seamlessly flow into the integrated Agent Workspace.
If any company can be called “nerdy” (in the most positive sense), it’s GitHub, a platform software developers use to host and review code, manage projects, and build software alongside a community of 50 million fellow developers.

GitHub initially relied on home-grown solutions to manage support requests from customers and internal employees. As the business grew, it became too costly to keep dedicating engineering resources to maintaining these systems. Implementing the Zendesk CX platform was an obvious choice.

With 100 percent of its support team working remotely, the company also saw in Zendesk the opportunity to streamline communication and support not only for its customers but across the GitHub organization, providing more fluid ticket routing and collaboration. GitHub takes advantage of Zendesk’s native integration with Slack to enable collaboration between teams that may not be in Zendesk every day, allowing people to remain in their primary environment while engaging in cross-team discussions using Side Conversations.

“A lot of cross-team collaboration occurs in GitHub, but when we need a lightweight option for transient discussions, our teams rely heavily on Slack. Side Conversations lets us initiate these discussions in either a Zendesk ticket or in Slack,” says Premila Anand, Director of Support Operations at GitHub.
Remote Support

While technical support tickets are typically resolved using the wide range of Zendesk CX platform tools that we’ve already shared, some customers may require some level of face-to-face, remote support.

In fact, you may offer this as a standard feature within your Premium plans. Zendesk offers several out-of-the-box integrations to support this capability.

The Zoom integration for Zendesk provides the following feature set:

- Schedule and launch a Zoom meeting from within a Zendesk support ticket
- Save Zoom Meeting details, recordings, transcripts, chats, duration and any notes after a call directly within Zendesk as an internal note. Easily access them anytime for future context or quality assurance.

This collaboration tool achieved ubiquity during the pandemic, so it’s already familiar to support engineers and customers alike.
The TeamViewer integration with Zendesk empowers your technical support team to access and control devices remotely in order to troubleshoot technical issues for customers over a variety of channels.

With TeamViewer, your support engineers can easily create a remote support session directly from a ticket in Zendesk to Windows, Mac, Linux and mobile devices. They simply insert the created link into the ticket and send it to the customer. Once the customer goes online, they will appear in the TeamViewer service queue and the support engineer can instantly connect with a single click to his device.

Watch a short overview of the TeamViewer integration with Zendesk [here](#).

The Recursive Labs integration with Zendesk empowers your technical support team to interface with their customers live. They can provide remote support on any device at the click of a button – without the need for a download. They can interact with customers directly from inside Zendesk, automatically attach session data to trouble tickets for reporting/auditing purposes, and view session recordings right from within a ticket. Implementation is simple, fast, and effective. You can be operational in a matter of hours.

The Recursive Labs customer engagement capabilities include no-download video and voice chat, patented co-browsing, session archival recording, and the ability to live stream video from any mobile device without the need for an app.

In addition to providing technical support, your team can use this platform for customer onboarding, video chat, mobile app support, and identity verification.

Watch a short overview of the Recursive Labs integration with Zendesk [here](#).
Escalate Tier 3 tickets to new heights

Tier 3 support engineers typically offer the highest level of technical support, tackling the toughest customer problems. Tier 3 agents are product and service specialists who are equipped to tackle one-off issues that haven’t been encountered before and that may require additional engineering work to resolve. Before escalating these tickets to a backend development team, a Tier 3 support engineer will typically first vet and validate the customer issue. Tier 3 support agents also typically test any fixes that are put in place by the development team, before settling the issue for the customer.

Given the complex nature of their role and their need to interface with backend engineering teams, Tier 3 support engineers require an expanded set of process tools relative to those used by lower-level support teams. Fortunately, Zendesk easily integrates with a wide range of these industry-standard tools. Let’s take a look at a few.

→ Bug reporting & tracking
→ Incident management
→ Change management

Bug Reporting & Tracking

Once a Tier 3 technical support engineer validates that a software bug exists, it’s imperative that the agent engages the engineering team through the applications and systems that it already uses. Bug reporting and tracking tools help development teams find, record, and track bugs in their software.

A robust bug and issue tracking tool gives your team a single view of all items in the backlog, regardless of whether the work item is a bug or a task related to new feature development. Having a single source of truth of all issue types helps teams prioritize against their big picture goals, while continually delivering value to their customers.

Zendesk provides out-of-the-box integrations with most industry-standard bug tracking tools. Let’s take a look at a couple of those apps.
Through the **Jira** integration, your support and engineering teams will always be on the same page whenever a development issue arises. This integration makes it easy for your Tier 3 technical engineers to escalate and link Zendesk tickets to a Jira issue so critical information is shared and collaboration is effortless. They can notify engineering of bugs that are impeding your customers’ experience and get updates on the issue’s resolution—all from within the Zendesk platform.

On the other side of the house, in Jira your engineering team will have a complete view of customer conversations related to an issue. They can collaborate with your support team to resolve issues—without having to leave Jira.

While this is an out-of-the-box integration, you can also customize it to fit your team’s workflows while maintaining complete control over what data gets shared between teams. For instance, you can choose what Jira information that you want to show in the Agent Workspace and you can share tags from Zendesk to Jira.

Watch a short overview of the Jira integration with Zendesk [here](#).

Through the **Azure DevOps** integration, technical support engineers can easily create new Azure DevOps work items and get in touch with developers from within the Agent Workspace. The app allows support agents to link existing Zendesk tickets to existing Azure DevOps work items. In addition, the DevOps integration enables support agents to notify the Azure DevOps team by sending comments directly within Zendesk.

![Azure DevOps Integration Demo](image)

Azur DevOps Integration Demo

(1) Linked Work Items:

#618 test demo ticket subject

Work Item Details:

- **Item**: #618
- **Type**: Issue
- **Project**: First Project
- **Status**: Closed
- **Assignee**: Not Assigned
- **Title**: test demo ticket subject

Watch a short overview of the Azure DevOps integration with Zendesk [here](#).
Limeade’s integration with Azure Devops helps drive their global expansion

Limeade is a well-being software company that helps build great places to work. A pioneer in the world of HR technology, Limeade helps companies amplify care for their employees every day in order to deliver improved people results.

Over the last two years, the company has more than risen to the challenge of helping their 2M+ users navigate unprecedented changes to the new way of work. True to its SaaS roots, Limeade has continued to innovate and develop its product and service offerings, launching over 25 new features in the last year alone. Pair this with the acquisition of three new companies and an ambitious strategy for global expansion, and it’s clear to see why the priority for Limeade has been agility.

Zendesk quickly became Limeade’s customer service backbone, empowering the team to innovate at the same rate as the rest of the business and scale efficiently. With Zendesk, Limeade has been able to increase its user base by 60 percent without needing to increase customer support headcount.

One of the keys to Limeade’s drive towards efficiency is their out-of-the-box integration with Azure Devops, which has helped Limeade’s development team facilitate a quicker, smoother experience for customers submitting technical tickets.

The app automatically creates an Azure Devops ticket for the technical team and feeds updates back into Zendesk. “That made a huge improvement to the time it took for us to resolve those types of tickets – dropping by 35 percent” says Ryan Putnam, Director of Customer Service at Limeade.
Incident Management

Incident management is one of the most critical processes a technical support organization needs to get right. Service outages can be costly to the business and teams need an efficient way to respond to and resolve these issues quickly.

An incident management process helps technical teams investigate, record, and resolve service interruptions or outages. A solid incident management workflow goes a long way towards reducing downtime and minimizing both financial and reputational impact. Using templates designed to manage incidents, you can create a repeatable incident management workflow, which ensures teams log, diagnose, and resolve incidents and have a record of their activities.

Once more, Zendesk provides a native set of workflows for reporting and managing incident and problem tickets. You can also use out-of-the-box integrations to connect Zendesk to other industry-standard apps that enable your support engineers to collaborate and route incident tickets to other teams.

### PagerDuty

PagerDuty’s real-time operations platform helps companies increase reliability and customer satisfaction by routing and escalating critical issues to the proper teams that can resolve the issue in a timely manner. As the acknowledgement, research and resolution process is happening, your Tier 3 support engineers can stay up to date with the PagerDuty integration and provide updates to your customers.

The PagerDuty integration delivers a core set of capabilities to your Zendesk-powered support team.

- **Event Intelligence:** Make it incredibly easy to separate the signal from the noise and provide total situational awareness when issues occur, with advanced event automation, adaptive machine learning, human context-enriched triage, and a flexible team-oriented model.

- **Visibility:** Provide both technical and business stakeholders a shared, real-time view of how technical incidents impact digital experiences, enabling them to proactively do the right thing for the business in real time.

- **PagerDuty Analytics:** Combine machine and human response data to provide modern operational insights to business and operational leaders, enabling them to accelerate process maturity and better business outcomes.

You can watch a demonstration of full-case incident ownership through the PagerDuty integration [here](#), including notification and resolution swarming through Slack as well as internal collaboration through Zoom.
Opsgenie by Atlassian is a modern incident management platform which empowers Dev & Ops teams to plan for service disruptions and stay in control during incidents. Opsgenie provides the tools needed to design actionable alerts, manage on-call schedules and escalations, and orchestrate communication and collaboration during the incident resolution process.

Opsgenie provides a powerful integration with Zendesk. When a new ticket is created in Zendesk, your Tier 3 support engineer can create a corresponding alert in Opsgenie. Opsgenie provides rich notifications based on on-call schedules, rotations and escalations, thereby ensuring the best incident management for Zendesk users.

Opsgenie's integration to Zendesk enables your agents to:

- Manually create alerts in OpsGenie for Zendesk tickets. Updates to the Opsgenie alert such as acknowledging or closing would be reflected to the alert details shown in the Zendesk ticket.
- Add responders to your Opsgenie alert right from your Zendesk ticket to route the alert to a specific user or team.
- Close your Opsgenie alert right from your Zendesk ticket when the ticket is resolved.

This video demonstrates a complete end-to-end incident management scenario using both the OpsGenie integration as well as the Statuspage integration previously discussed. This combination is a powerful solution that enables your Tier 3 support agents to quickly chase down critical incidents as they occur.

**Change Management**

Change management processes are designed to minimize disruptions to products and services while engineers are making changes to critical systems and services. Whether you’re rolling out new services, managing existing ones, or resolving problems in code, modern change management approaches break down silos, provide context and transparency, avoid bottlenecks, and minimize risk. You can use the Zendesk Change Management Process Wizard when you are implementing standard service changes and want to achieve maximum efficiency.

In the extreme, emergency change requests arise from unexpected issues that are severely impacting your customers’ service. These need to be addressed without affecting other systems and customers. As we saw earlier, a major technical issue or problem can trigger an avalanche of incident tickets, and that problem ticket may be escalated to the backend development team for resolution. In this case, the solution may require a formal change to the system. In conjunction with our integration partners, Zendesk enables your Tier 3 engineers to manage this process from within the Zendesk CX platform.
By leveraging the capabilities of Zendesk, you can streamline your change management processes and ensure that changes are carried out effectively and efficiently.

The **SweetHawk Change Manager** app enables you to:

- Specify a “change” ticket type.
- Predefine the information required for change approvals.
- Predefine the approver(s) who need to assess a change before it can be implemented.
- Send out clear and simple-to-action approval requests.
- Easily track audit logs of who approved/implemented what on a ticket.
- Plan changes on a change calendar.
- Link changes to their origin and build workflows based on the status of change tickets.

In addition, this app is designed to work seamlessly with other SweetHawk apps such as **Approve**, **Tasks** & **Calendar** to help nail every element that you require for your change management processes.

You can watch a short overview of the **SweetHawk Change Manager** integration with Zendesk [here](#).

Through the use of bug reporting & tracking tools, robust incident management platforms and prescriptive change management processes and apps, your Tier 3 team is empowered to effectively collaborate with backend development teams to investigate and resolve even the most difficult technical issues.
Use dynamic analytics to optimize technical support operations

In order to optimize and fine tune your end-to-end technical support operations, it’s imperative that you continuously measure performance across every step of the customer service journey.

Customer service can either make you or break you in the marketplace, and it’s critical that you empower your support team to deliver exceptional customer experiences across all service tiers. This will set your team apart and create clear differentiation.

In parallel, you need to optimize technical support processes to effectively manage and control operational costs. At the end of the day, it’s all about collecting data and turning that data into actionable insights that enable your teams to fire on all cylinders.

Out-of-the-box and custom analytics

One of the strengths of the Zendesk CX platform is its robust set of out-of-the-box reporting and analytics tools. With Zendesk, you can:

- Collect and analyze real-time and historical data and access powerful reporting tools to understand past trends and take action on what’s happening in the moment.
- Analyze the performance of your technical support team using pre-built dashboards that are prepopulated with best practice customer service metrics.
- Create dynamic reports and live dashboards to better understand how technical support engineers are working.
- Share dashboards and reports to keep teammates and stakeholders in the loop about key insights and trends.
In addition to these out-of-the-box capabilities, Zendesk enables you to build custom dashboards (or custom tabs added to standard dashboards) so that you can establish and track unique metrics that tie back to strategic goals. For instance, you might want to track Cost per Ticket to ensure that you are appropriately balancing automation with staffing.

Custom dashboards also enable your product managers to track the performance of individual products and services, including support ticket trends, defect history, customer feedback and reviews, etc. This type of information can help drive product roadmaps, feature prioritization, and more. It also helps your teams identify potential underlying issues and proactively address them before they turn into major problems or incidents.

CUSTOMER STORY

MongoDB shapes its CX success through data and automation

Founded in 2007, MongoDB is the developer data platform company empowering innovators to create, transform, and disrupt industries by unleashing the power of software and data. With offices throughout the Americas, EMEA, and the Asia-Pacific region, MongoDB is always close to its 37,000 customers in more than 100 countries.

Due to a severe lack of meaningful data, MongoDB looked for a customer service solution that would provide real-time metrics and data for its agents. In January of 2022, MongoDB implemented Zendesk. And the results have been tremendous.

With Zendesk, MongoDB can provide complete transparency for its agents into the lifecycle of each request. Agents can immediately see total wait times for customers, incentivizing them to complete the tickets as quickly and efficiently as possible. Zendesk also provides agents information on their queue and on tickets that need urgent attention, which were previously not visible. Agents can not only see the reporting elements, but SLA’s as well. MongoDB can now monitor the number of tickets an agent has taken, different types of metrics, and efficiency.
### SLA Management

Service Level Agreements (SLAs) are the lifeblood of any technical support organization, especially if a customer is paying for a higher level of support. They ensure that you are delivering a consistent experience to all of your customers. SLAs represent a promise to your customers that you will solve their issues within a certain time. Meeting those commitments builds trust with your customers. On the other hand, breaching those commitments on a regular basis will most certainly lead to higher customer churn rates.

But why are companies breaking SLAs at all? The failure to meet SLAs is generally due to a lack of visibility into how long a conversation stays active within your team. As such, support organizations can’t recognize or solve bottlenecks that are causing a slowdown in ticket resolution. The ultimate cost for not understanding SLAs is an overall drop in net retention for your business.

Fortunately, the Zendesk platform provides a rich set of SLA management tools. Zendesk helps your administrators establish SLAs by defining service targets and by enabling them to track performance against your company’s service goals. With Zendesk, you can establish SLA policies, provide visibility to tickets that are about to breach those policies, and trigger automated workflows that ensure that your technical support team is staying focused on delivering against commitments.

SLA policies can either be customer-based or service-based. Customer-based policies represent commitments to a specific customer or to a specific set of customers within a given support tier. On the other hand, service-based policies represent standard commitments to all customers who have purchased specific software or service packages.

Along the same lines, Zendesk empowers your administrators to establish Group SLAs for your support operations. Whereas a standard SLA establishes response and resolution times to your customers, Group SLAs or Operational Level Agreements (OLAs) establish how quickly one team needs to respond and resolve tickets from another team within your organization. Zendesk Group SLA is a scalable solution that gives administrators, supervisors, and others who need to keep track of SLAs a clear understanding of how long tickets sit with certain teams, automatically reroutes tickets when an SLA is approaching a breach, and provides clear visual cues of a ticket’s existing status.
Gear up for the next release: Transformative CX

The software and cloud services industry continues to explode, and the SaaS model makes it easy for customers to leave you for a competitor. You can’t afford too many missteps, especially with high-value customers and accounts. Your technical support team is on the front lines ensuring that your customers are successful with an increasingly complex array of products and services, so it’s imperative that you put the best tools in their hands and empower them to be at their best. Zendesk is here to help.

✔ Self-service: Deploy Zendesk self-service technologies that enable your customers to quickly and easily get answers to most basic Tier 1 questions without engaging directly with your support engineers.

✔ Agent productivity: Use Zendesk’s powerful set of standard, out-of-the-box tools and automations to enable your Tier 2 support teams to work smarter and faster and quickly resolve next-level inquiries in under 30 minutes.

✔ Apps & integrations: For more complex technical issues that ultimately get escalated to Tier 3 teams, seamlessly integrate Zendesk with a wide range of industry-standard tools and enable your support engineers to easily engage and collaborate with backend development teams.

✔ Reporting and analytics: Using Zendesk’s industry-leading reporting and analytics platform, deliver actionable insights to your business and fine-tune your technical support operations.

This is an established blueprint that companies throughout the software and cloud services industry have successfully used to deliver exceptional and personalized technical support experiences to their customers.

Ready to deploy Zendesk?

→ See how other software and cloud companies have empowered their technical support engineers with transformative CX

→ Talk to a sales rep.