

THE DIGITAL TIPPING POINT

# How SMBs can accelerate CX success in 2021



zendesk

## THE DIGITAL TIPPING POINT

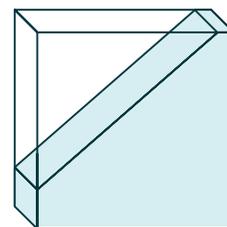
# Forget multi-year plans for digital transition—the time to act is now.

In 2020, companies made seismic shifts in how they do business as the impacts of COVID-19 transformed customer expectations and workplace dynamics, virtually overnight. Being digital-first and, in many cases, digital-only meant companies had to rapidly acquire new technologies to reach customers and connect remote teams.

According to Zendesk's 2021  
Customer Experience Trends Report

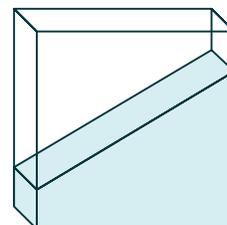
**67%**

of SMBs (businesses with under 100 employees) implemented new tools or processes



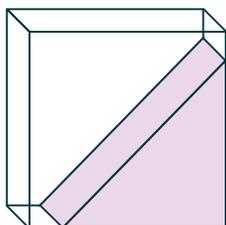
**50%**

of SMB leaders say COVID-19 sped up technology adoption



**34%**

of SMBs anticipate having more to invest in CX technology in 2021



Those who prioritized CX before the pandemic already have an advantage. More mature CX organizations are more than six times as likely to exceed customer retention goals. And while companies must work within their resources to adopt new technologies and processes, there's a risk of falling behind higher-performing peers as customer expectations rise.

Luckily, many anticipate having more budget flexibility in 2021.

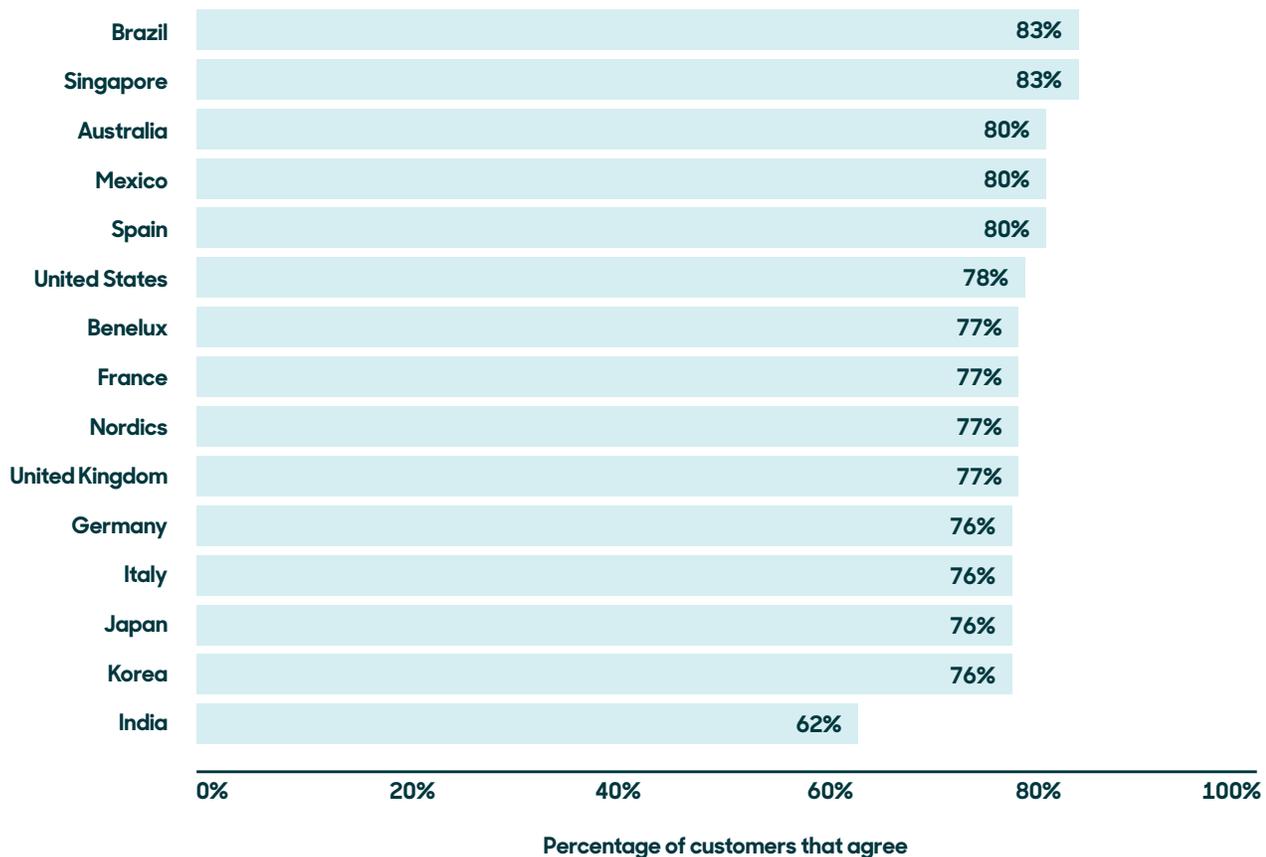
Digital tools aren't just for big-time corporations anymore. Small businesses face at least as much pressure to innovate as the enterprise.

Investing in your customers pays off, but what to prioritize can be a little tricky. To help guide the way, our team of experts reviewed data from businesses using Zendesk worldwide. Here are 8 best practices for delivering winning CX—and the time to act on them is now.

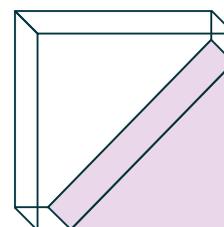
# 01 Make things easy for customers

PRIORITY #

Customers haven't become more forgiving despite the pandemic—80% will go to a competitor after more than one bad customer service experience.



In 2021, customers expect effortless online experiences that are on par with, or better than, in-person experiences. And companies are listening. Many plan to adopt new channels in 2021. They're adding to their help centers so customers can find quick answers without even having to speak to an agent.



**36%**  
of businesses plan to add a new support channel in 2021



## BEST PRACTICE 01:

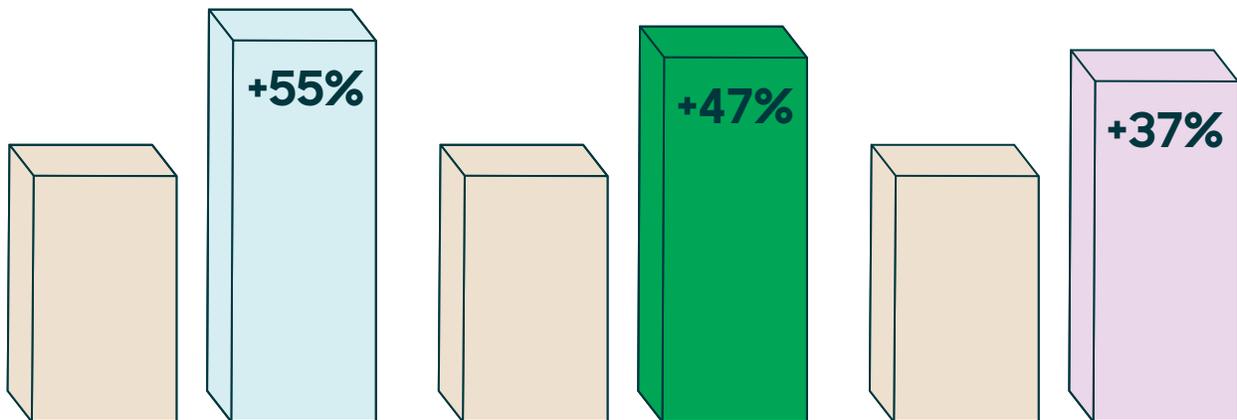
# Meet customers where they are

Customers expect brands to meet them where they are—customers shouldn't have to climb a ladder to reach support. And where they are is on messaging channels, like Facebook Messenger and WhatsApp.

Teams with the best CX results are 1.4 times as likely to use messaging

- WhatsApp
- SMS/text
- Facebook Messenger/Twitter DMs

### SMBs have seen a 40% increase in messaging requests



With support that's fast, personal, convenient, and secure, customers can get answers over the same channels they use with friends and family. Messaging also provides more flexibility for both customers and businesses because conversations can happen in real-time or asynchronously. In other words, customers can start, stop, and continue the conversation when it's convenient for them, without losing conversation history. That means customers can troubleshoot while they take care of other things like walking the dog or running a Zoom meeting, and agents can help more customers at once. And with Zendesk, teams can deploy messaging out-of-the-box—no coding required.

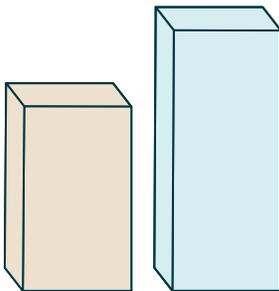
## BEST PRACTICE 02:

# Help customers get answers faster with self-service

When customers want to get in touch, they want convenient options. But for simple questions, they just want quick answers. That's why customers prefer to help themselves and rely on companies' online resources more in our digital-first world.

**40%**

increase in  
knowledge base views



Though high-performing teams are adopting AI, most of their peers aren't. This presents an opportunity for businesses to make AI a better partner to agents. With Zendesk's Bot APIs, they can integrate their CX software with various chatbot solutions like [Ada](#) so agents and bots can work seamlessly together.



**High-performing teams are 4x more likely to use Answer Bot**

Empowering customers to self-serve also saves agents time from answering repetitive requests. Adding a help center or community forum is a good start, but teams can get even greater value from self-service when they pair it with AI. An AI-powered bot, like Zendesk's own, can recommend help center articles to enable customers to self-serve throughout the entire customer journey, such as on your checkout page. Bots are also "always-on," so customers get answers 24/7.



**High-performing teams are 48% more likely to have added to their self-service resources**

# 02

PRIORITY #

## Support your support team

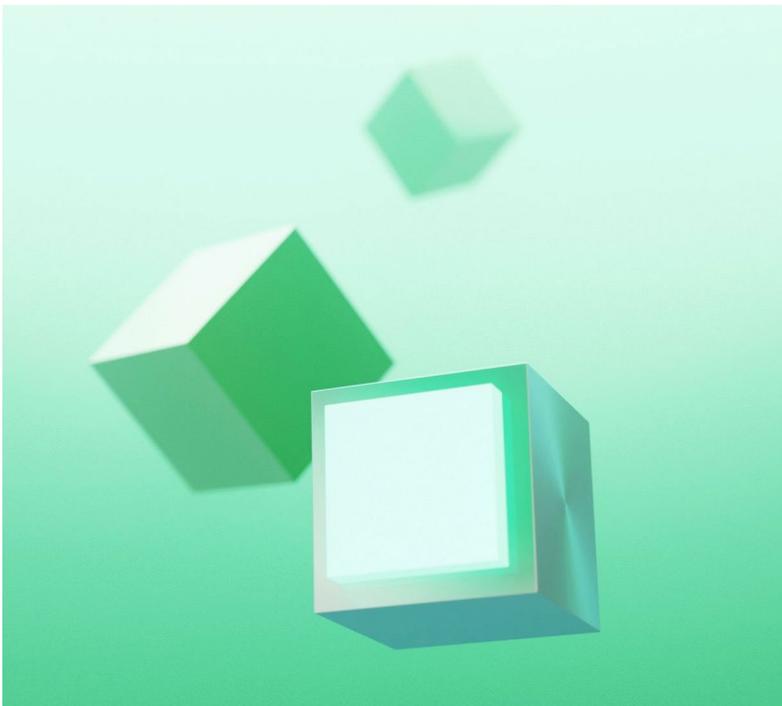
While companies have been expanding their online channels to reach customers, they've also faced the challenge of transitioning to remote work.

With companies learning to work in new and flexible ways, they'll need to become laser-focused on the employee experience (EX). Good CX and good EX are like peanut butter and jelly: they're intimately linked. Yet agents feel overwhelmed.

Meeting customers on their preferred channels is only one part of providing effective support. Equipping teams with tools to do their jobs well—regardless of how a customer reaches out—is crucial to good customer service.



**Only half of agents say they have tools to succeed in this new world**





## BEST PRACTICE 03:

# Bring it all together with one view for agents

SMBs have limited resources, and many were already feeling spread thin with all the channels customers expect to reach them on. And yet, 59% of SMBs are looking for new ways to engage customers—meaning agents can expect to manage more channels in the future, not less. They need a unified workspace that connects all their channels, tools, and customer context to provide quick and personalized support at scale.

**Companies with the happiest customers are over twice as likely to have agents working across channels**

With 40% of customers using multiple channels for the same issue, agents need to be able to seamlessly shift between channels without losing customer context. This ensures customers don't have to repeat information they already addressed or wait on hold while agents search for the details each time they change channels.

### For example, if Tara texts Cool Kitchen to return a blender, agents should have visibility into:

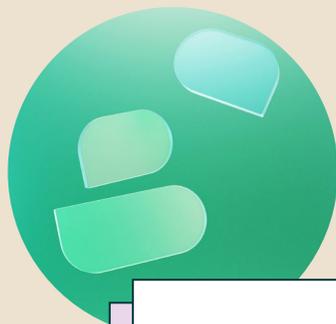
- ◆ If she reached out about issues with the blender before, even if it was over different channels
- ◆ Her contact information, such as her email to send her a receipt
- ◆ How long she's been a customer (perhaps loyal customers get free returns)
- ◆ Her billing, shipping, and order details—Cool Kitchen might integrate its CX solution with Shopify so agents have this information in front of them and can help Tara return her blender inside their workspace

## BEST PRACTICE 04:

# Empower agents with workflows that promote efficiency and collaboration

Companies, especially smaller ones, are investing in tools that promote efficiency and collaboration across teams and departments.

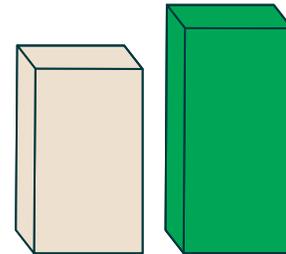
Collaboration tools have had to scale up in our always-on, always-connected world. Higher-performing teams use workflow features to ensure agents have a process for working together and the tools and data needed to realize it. Businesses can enable agents to have conversations with each other inside tickets. And with tools like Slack and Zoom inside their workspace and robust permissioning around who can access what, agents can collaborate with each other, other departments, and even third parties.



**Teams with the fastest resolution times are over twice as likely to use workflow management tools**

**22%**

**more CX teams used collaboration features in 2020, compared to the previous year**



Workflow features also empower agents to work efficiently. For example, teams can capture preliminary details from customers with a bot or automatically route issues to agents with the right skills.

## BEST PRACTICE 05:

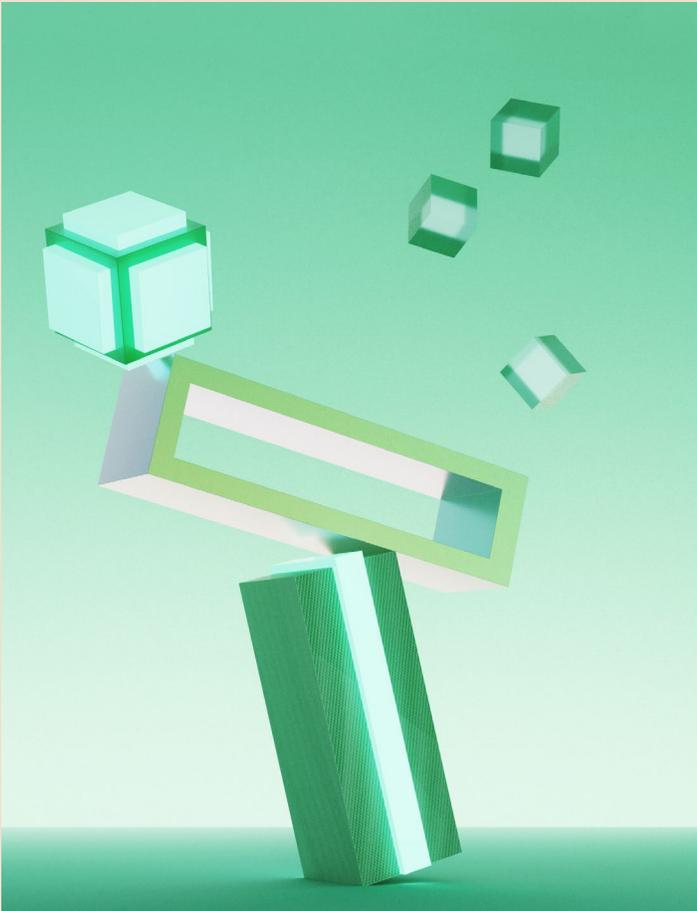
# Scale self-service with help from agents

SMBs must make limited resources go far. For a small team of agents to do the big job of providing exceptional support, you need to equip them with tools to do more with less.

Good knowledge management doesn't just empower customers to find answers faster, it also helps agents find critical information quickly. Those same agents are your best resource for growing your knowledge base and keeping content fresh to make it ever more valuable. Knowledge management tools enable agents to create new articles while answering tickets, and AI-powered suggestions automate knowledge management hygiene.



**Top-performing teams are 40% more likely to use features allowing agents to contribute their knowledge**



# 03

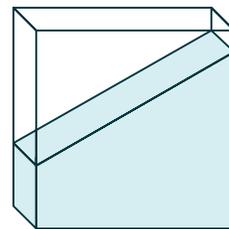
PRIORITY #

## Keep your business in sync

With the pandemic accelerating adoption of digital tools, keeping your business in sync is no easy feat.

Keeping the organization in sync means bringing data between people, tools, and software together, not leaving it scattered and siloed. That's why legacy CRM systems no longer work. SMBs today need a CRM platform that's open and flexible, one that connects the data dots across many sources with plug and play apps and pre-built integrations. This allows them to be agile, empowering teams to go beyond capturing data and focus on understanding and reacting to it instead. And agility is a top priority for them this year.

**59%**  
of businesses  
are looking to  
improve agility



## BEST PRACTICE 06:

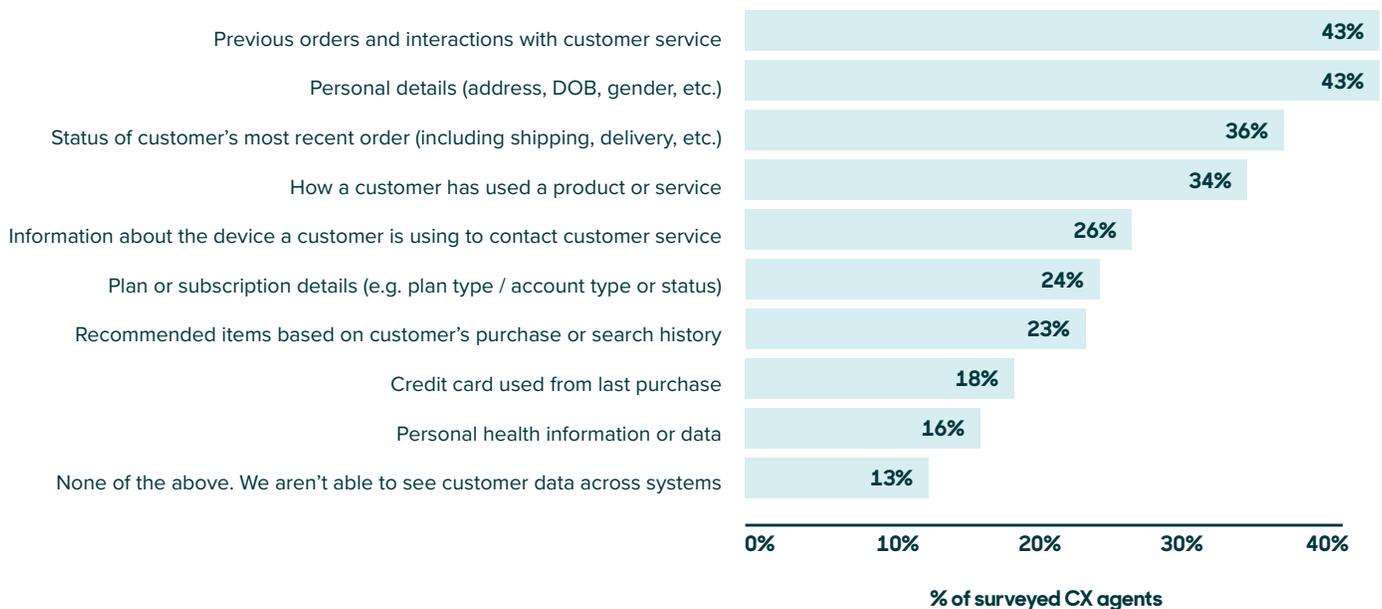
# Personalize CX with a unified customer view

75% of customers expect personalized experiences. Yet, less than half of agents have access to data to personalize conversations.



## Most agents at companies of all sizes don't have access to customer data

Which types of customer data are you typically able to access across systems to answer customer requests?



Relationships are critical during times of crisis, and to deliver personalized experiences that build trust on the front-end, companies need to manage and interpret data on the back-end. This means creating a unified customer view, one that connects customer data wherever it lives, whether it be first-party or third-party.

## BEST PRACTICE 07:

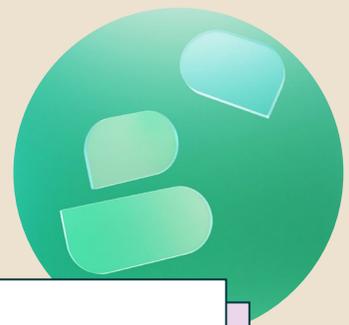
# Extend your agents' workspace with apps and integrations

You want your CX solution to work in sync with all the tools and applications your team depends on, so agents have the up-to-date information they need in front of them. With plug and play apps, SMBs can extend their CX solution without big developer budgets or IT teams that can build custom integrations. [Zendesk's Marketplace](#) gives them access to over a thousand pre-built integrations—from workforce management tools like [Tymeshift](#) and project management apps like [Asana](#) to translation software like [Unbabel](#) and customizable survey tools like [SurveyMonkey](#).

With a treasure trove of customer insights in front of them, agents can anticipate customers' needs and further personalize service. For example, with access to marketing automation tools like [Mailchimp](#), agents can view email campaigns customers have received, and tailor responses accordingly. Being able to access data across all those tools from one location also goes a long way toward improving efficiency. Agents can do their job within one system, without having to swivel between several.



**High-performing teams are 44% more likely to use apps and integrations to extend their CX solution**



## BEST PRACTICE 08:

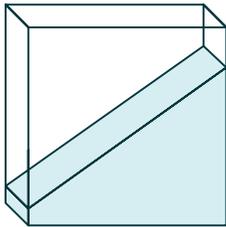
# Learn how to improve with analytics

Keeping your business in sync also means integrating analytics from every channel so you can measure and improve the entire customer experience—from identifying areas of development for your team to understanding how customers interact with you. Yet 43% of managers don't have analytics tools to measure success for remote teams.

**High-performing teams are twice as likely to use an analytics reporting solution**

**43%**

**of managers don't have analytics tools to measure success for remote teams**



To keep up in a pivot-quickly world, CX organizations need analytics software that gives them instant access to insights they can act on. With real-time and historical analytics built inside their CX solution, support teams can take action on what's happening at the moment and understand past trends—no statistics degree required.

# Which side of the tipping point will your business be on?

Making things easy for customers, supporting your support team, and keeping your business in sync are the three keys to delivering great CX in the next-normal. Businesses can't choose just one of the three, focusing on one area and putting the others off until later. Prioritizing all three is essential—and it's actually quite difficult to be good at one without investing in the others.

The Zendesk Suite provides the complete customer service solution that's easy to use and scales with your business. Learn more about how Zendesk can help ensure you're on the right side of the CX tipping point.

Get started here:  
[sign up for a free trial today](#)

