How to use Zendesk for HR

We’ll show you how to use Zendesk internally to assist employees, share knowledge, and boost employee retention.
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How do you build for the future of work with all the practical constraints of the present?

HR teams have been put in a tough spot. They are tasked with leading the charge into the new era of flexible work, meanwhile they are still responsible for the daily work of hiring, training, and supporting internal teams.

We’re also in the midst of a workforce revolution, as more professionals are reconsidering their priorities and making career moves. This means companies are experiencing higher turnover, and those who remain are shouldering larger workloads until positions can be filled.

Tickets filed by corporate employees jumped

31%

(last year—nearly double the rates seen by B2B and B2C companies.)
To retain employees, you need to make their lives easier when they’re at work.

This is where your internal help desk plays an important role. You can answer their questions, troubleshoot problems, and be a resource that allows them to do their best work.

But they can’t do their best work if you aren’t equipped to do your best work.

How Zendesk can help

Using Zendesk for internal support gives you the power of a robust ticketing system and the flexibility to create workflows that work for your team. You don’t need to be a developer to understand how to use Zendesk, and you don’t need to be a large team to see its benefits. It’s a flexible solution that can help you do more with less effort.

In this guide, we’ll show you how your HR team can use Zendesk’s low/no code tools to modernize your help desk and start building for the future of work, right here in the present.

• Make institutional knowledge available everywhere employees need it

• Use automation to handle frequently asked questions

• Track KPIs, so you can celebrate wins and identify areas to improve

• Build a solution that fits your needs now and evolves as your needs change
Help your employees help themselves

Tired of answering the same questions over and over? Give your employees the answers, so you don’t have to.

Benefits of an internal help center:

**Stem the tide of incoming questions**
An internal help center allows employees to solve problems independently by searching your library of articles and guides. By documenting frequently asked questions and troubleshooting tips, you can reduce the number of repeat requests coming into your help desk.

**Share information without duplicating efforts**
Your help center also fuels your service team. Team members can access all your help center resources right in the Zendesk Agent Workspace. Plus, if a new problem pops up, they can start creating a new article on that topic, looping in necessary contributors.

**Keep institutional knowledge up to date**
Change is inevitable. You bring on new tools, revise policies, and evolve best practices. These changes need to be captured in your help center for it to remain useful. Zendesk can help you remember when it’s time to update existing articles with automatic reminders.

Launch your help center faster with Zendesk Guide

1. **Get started**
Enable Zendesk Guide via your Support account.

2. **Prepare for release**
Adjust the look and feel, create your content, and test it out.

3. **Go live**
When you’re ready, make it live for end users.
You can start creating your help center now, no need to wait for a web designer.

We have a standard help center theme that can be customized with your brand colors and logo, or you can elevate the look and feel by using one of the design-friendly themes available in the Zendesk Marketplace.

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

1. Sign in to Zendesk Support as the account owner
2. Click the Products icon (.guild) in the top bar, then select Guide
3. Click Get started

See the Zendesk Help Center for more details on how to set up your help center.

You don’t need to be a great writer to write great articles

1. Keep it simple.
   
   Your help center is not the place to practice your puns. Use plain language and get right to the point.

2. Be specific.
   
   When explaining how to use a program or troubleshoot a device, describe the process using specific product names and terminology.

3. Optimize for searchability.
   
   Use the same keywords and phrases that your employees would be likely to use. Look at past help desk requests for clues.

4. Make regular updates.
   
   Out of date content isn’t helpful to anyone. Get in the habit of updating existing articles, and revise or remove articles that are no longer relevant.

5. Collect user feedback.
   
   Pay attention to user feedback (up and down votes on articles), and review page analytics to understand which articles and topics are most useful.
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, and there are a few reasons. First, they can handle some of your most routine, repetitive questions. This makes them a great option for small teams that are working overtime to support a wide range of needs. Second, they are always-on, which means you can better support your employees who are working outside the standard 9-5.

**Answer Bot** is Zendesk’s conversational AI. We built it using a language model that allows Answer Bot to better recognize slang and uncommon vocabulary (like branded product names), making it much more likely you’ll get a helpful answer on the first try.

Why you should make Answer Bot part of your service team

**Give your human team members a much-needed break**

Let Answer Bot pick up some of the slack. Use it to help field some of your most frequently asked questions, so you can save your team’s brainpower for more challenging problems. Plus, if an employee asks for further help, Answer Bot can create a ticket using the information already provided.

You can launch Answer Bot in minutes, no coding needed. Here’s what to do:

- Enable Answer Bot in your Zendesk account
- Decide what you want your bot to say using our Flow Builder
- Turn it on, and start fielding employee questions

Find step-by-step instructions in our quickstart guide to Answer Bot.
Impress employees with helpful, in-the-moment recommendations

How to optimize your help center articles for Answer Bot

Web forms

Wow your employees by answering their questions before they even ask. With a little help from Answer Bot, you can suggest relevant help center articles directly in your help desk form. This helps stem the tide of incoming questions without diminishing your experience.

Visit our help center for instructions on how to set up web forms.

Email replies

You can also provide automatic article suggestions in emails. When an employee receives an auto-reply from your help desk, Answer Bot will populate a short list of help center articles related to their request. If they find what they need, then they can close their request and get on with their day.

How to optimize your help center articles for Answer Bot

Answer Bot crawls your help center articles to identify relevant information based on keywords and phrases. Keep this in mind when creating new help center 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.
You can’t improve what you can’t measure. Track performance metrics in Zendesk, so you can celebrate wins and identify areas for growth.

You need data to help you understand what’s working, what’s not, and how to make it better.

With Zendesk, you’ll have access to support metrics and agent performance stats, so you can start to see trends and identify where improvement is needed.

Watch: Introduction to analytics in Zendesk
Looking at too much data at once can be overwhelming. We suggest creating custom dashboards with your team’s key performance indicators (KPIs). See our help center for guidance on how to create dashboards.

It’s different for every org, but these are a few things you’ll probably want to know:

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

This is good to know so you can plan your staffing strategy (and lunch breaks). It also helps to know your peak times, so you know when not to schedule a meeting with your internal support team.

**What types of questions are most common (based on category tags)?**

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

**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.

You can create custom reports that are delivered on a schedule automatically, or they can be done as needed when it’s convenient for you.
Solve for the present, build for the future

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 new employees who need to be onboarded. We can help you tackle the day-to-day with a little more finesse, and we can give you the data you need to prove the impact of your work.

Organizations also face mounting pressure to retain and develop top talent in the midst of a hot labor market, where employees at all levels are reconsidering what work means to them and what they want to achieve.

Your help desk is a small but mighty part of the employee experience. 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. Our tools can be adapted as your organization evolves to meet new challenges, whatever they may be.

So, once the budget request is approved, what should you do next?
How to set up Zendesk for your internal help desk

1. Get started fast with no/low code tools

You don’t need an engineer or web developer to make Zendesk work (though it never hurts to have an expert on-call). If you want to retain conversations from your old system, you can use our free Help Desk Migration app to transfer them to Zendesk.

Need help onboarding your team? Visit training.zendesk.com for free Zendesk tutorial videos.

2. Add your favorite apps

We want Zendesk to work for you, so we partner with companies like Slack, Microsoft Teams, Zoom, SurveyMonkey, and more to make sure that Zendesk plays nicely with the tools you already know and trust.

To install apps in Zendesk:

• Search apps and integrations at zendesk.com/marketplace
• 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, PagerDuty, Okta
Collaboration | Slack, Microsoft Teams, JIRA, Zoom, PandaDoc, Go2Assist Remote Support, LumApps
Project management | Asana, Trello, SweetHawk, Myndbend Process Manager Lite, Cloudset
Performance | Tymeshift Workforce Management, Kaizo, Klaus, Geckoboard, MaestroQA
Feedback | SurveyMonkey, SweetHawk, Qualtrics, Stella Connect, Harvestr
3 Refine your experience

Experiment with tools like triggers, automations, and integrations to build your optimal setup. Zendesk comes with a set of default triggers, which you can add to (or replace) as you get accustomed to the interface. Triggers are business rules that run automatically when certain conditions are met. Here’s how to set up a trigger.

To access your triggers:
- In Admin Center, click the Objects and rules icon (            )
- Select Business rules > Triggers

Default trigger best practices:
- 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 Ask for employee feedback

Zendesk has satisfaction surveys already built in, and these can be customized. 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 Center
- 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 customize your satisfaction surveys in Zendesk.

5 Look under the hood

As you get comfortable with Zendesk, you can start to explore under the hood. You can tinker with your setup, integrate data from other systems, and even build custom apps specific to your organization’s needs and functions. Whether you have a technical team or not, you can use our developer tools to build your ideal help desk.

6 Build for the future

Do you dream of a smart help desk powered by artificial intelligence? Can you picture providing highly personalized 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.
Zendesk: A smarter way to help your employees

Internal employee support can be a point of pride when you build with tools that are up to the task.

Zendesk is an approachable, low-no code system for internal help desks that you can start using right away, and it can grow with you as your needs evolve.

Get started with Zendesk for HR.