

THE SMB AGILITY PLAYBOOK

# Set yourself up for long-term success



Agility was the word on everyone’s lips when the world went topsy-turvy in 2020, but the truth is that businesses were already being challenged to be more nimble.

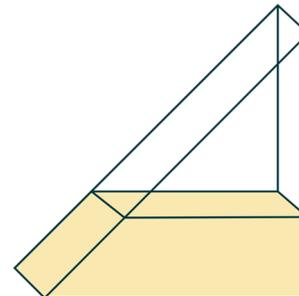
Customers expected better experiences tailored to their needs, pushing companies to devote resources into every corner of their customer experience. CX became a competitive differentiator, with customers often citing it as a reason they chose one company over another, and businesses seeing the value of adapting to those needs.

Then, along came 2020.

Small businesses were hit hardest economically but demonstrated the drive to keep going. In a span of months, they invested in CX capabilities that might have otherwise taken years to roll out.

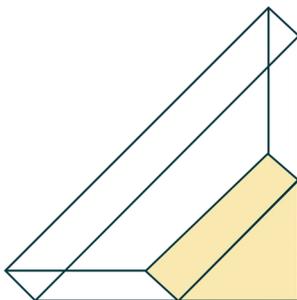
**52%**

52% of SMBs view CX primarily as a revenue driver and only 24% view it as a cost centre.



**23%**

SMBs saw ticket volume increase, on average, by 23% vs. Q1 2020.



Businesses whose ticket volume increased invested more in agility-building tools than those that had declining ticket volumes, according to Zendesk survey data. While this shift might have been necessary for survival, there’s a strong case for making agility a permanent part of every SMB playbook. In other words, the pandemic isn’t the reason companies need to build their agility muscles, but rather a proof point for why building and maintaining those muscles is so important.

To be ready for whatever is around the corner, companies of all sizes need to be responsive to customer needs. Being agile is how you establish CX as your competitive advantage, not for one unusual year, but for every year and decade to come.

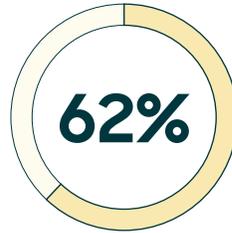
# But what is agility?

Some liken agility to speed, and some equate it more with flexibility in the face of the unknown. It is both: a combination of empowered teams moving toward a shared vision, and operating procedures that allow for experimentation and change.

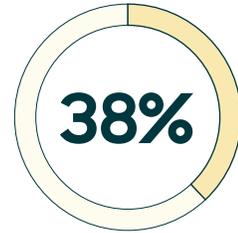
**Agility** is a business' ability to respond to changing conditions quickly, make change easier to manage, and turn change into opportunities to better connect with customers.

It requires building a set of habits that make you stronger over time, more deliberate about your actions, and therefore more likely to respond to the many variables that are out of your control.

It's hard to know where to start. To better understand how businesses are thinking about and becoming more agile, Zendesk surveyed 3,900 customers and 3,900 customer experience and customer service business leaders, managers and agents. We also looked at agility data for more than 90,000 companies across 175 countries on Zendesk.



of surveyed companies rate their organization as extremely or somewhat agile.



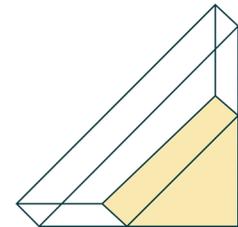
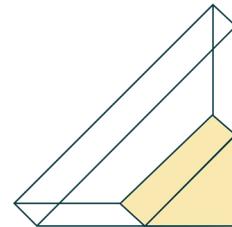
rate themselves as middle of the road or not agile.



saving in costs



saving in time



Leaders in customer service who embody agility report major savings in both cost (more than 25%) and time (35%) for their companies.

To be really agile, you need to do all three of these things:

**1. Make it easier to hear what customers are saying**

**2. Design your team to stay productive through change**

**3. Invest in flexible technology that supports your CX goals**

# D1

## Make it easier to hear what customers are saying

A major business challenge is keeping pace with customer needs, so offering more choices for how customers get in touch is imperative.

Customers are doing their part, communicating on social channels, customer surveys, via advocacy teams, product pilots and more. But it's difficult to turn all of this information into meaningful insights and actions for the company to take.

**Dream state:**  
The business understands what customers want and knows how it will respond to trends or opportunities that arise.

### How you'll get there

**Develop reliable ways to listen to what customers want and offer choices at every stage of the journey**

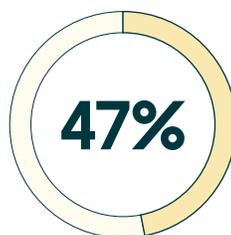
Whether it's providing more channel choices or improving self-service, it's important to open different pathways for customers to communicate with the business. Survey data indicates that the appearance of choice is a critical element for many customers and impacts their likelihood of spending more.

Phone (57%), email (47%) and chat (26%) were the most commonly used channels by consumers this past year.

The same three are also customers' most preferred channels overall.



Phone



Email



Chat

Despite the ongoing preference for legacy channels like phone support, emerging channels, such as messaging and social, are quickly gaining ground. This means it's not a time for complacency as Generation Z – which has readily adopted emerging channels – arrives in the market with buying power.

Remember that a key component of agility is striking a balance between speed and positive outcomes for customers and the business. Ensure you have the resources to adequately support new channels, and that you can align with customers' expectations for response time. Take chat, for example. Chat has the highest CSAT, but only if you can stay within first-response-time expectations of less than a minute.

Customer service channels aren't the only ways for customers to express their CX needs. Integrating online surveys into the entire customer journey, via partners like [Qualtrics](#), [Stella Connect](#) by Medallia or [SurveyMonkey](#), can make feedback a natural part of the customer experience and provide the business with key insights at every step of the way.

### Keep a pulse on evolving trends with comprehensive analytics

Teams need to quickly make sense of customer data to take appropriate action, but they're unable to do so without real-time data on hand. Enabling continuous data-gathering and analysis across your organisation is a key element of agility.

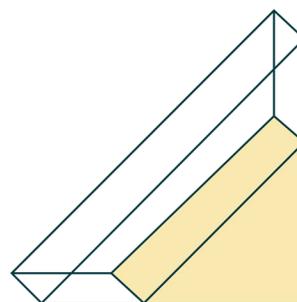
Some 58% of Benchmark companies relied on analytics more to understand how their teams are performing across customer service channels. Workforce optimisation partners, such as [Tymeshift](#), [Agyle Time](#) and [Verint Monet](#) can provide the data, scheduling capabilities and performance training that support leaders need to make teams and agents more efficient and engaged.

### Break down silos by integrating CX data across the business

Data often gets stuck in silos, visible to only a handful of people or within one team. Allow data coming from your CX team to flow to other teams like marketing and operations, and vice versa. A better customer experience is possible when teams merge customer feedback – often managed by a Voice of the Customer programme – customer insights, and overall business data. A complete context-rich view of these variables makes it easier for the entire organisation to spot problems and set priorities.

**43%**

SMBs say they don't have the data they'd like; 43% report their data is only adequate to track customer service and key performance indicators.



## Focus on the entire experience with a unified view of the customer

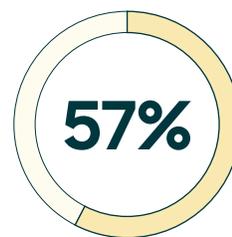
A unified view of the customer can also result in a better customer experience. For example, if an agent doesn't have visibility into the customer's previous purchase history or customer support calls, it can be more difficult to provide efficient service.

Almost 60% of surveyed agents report having a single view of both customer data (59%) and business context (57%).

Though a third of companies reported that their view of the customer is less than ideal, a better one was included on many future roadmaps.



agents with a single view on customer data



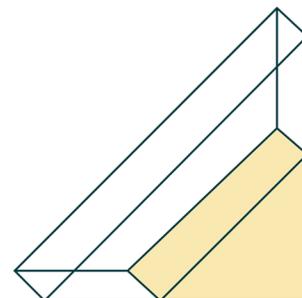
agents with a single view on business context

Agents stand to benefit first from a unified view of the customer, and the impact of those benefits ripples out to the rest of the CX org. For example, having context into the customer's history means the customer doesn't have to repeat information if they get transferred to another agent. Or, it may make a customer's day when an agent thanks them for 10 years of loyalty. The business only benefits when these experiences are associated with the brand.

Listening carefully to customer needs helps ensure you can react to improve CX in the short term and plan properly for the long term. But a word to the wise: agile does not mean that everything changes constantly. Continually analyse your data to truly understand what's driving your business, and give your strategies room to breathe before you make major changes.

## 38%

Consumers report having to repeat information in more than half of their CX experiences. 38% were 'more' or 'much more' likely to buy from a company if they didn't have to repeat information.



# 02

## Design your team to stay productive through change

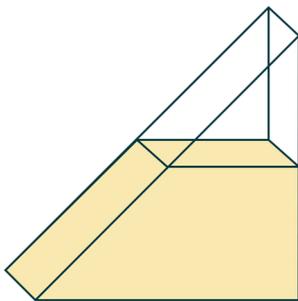
Agility hinges on designing your team and processes to be adaptable and productive in the face of change. Though every business has processes for getting things done, some processes are more nimble than others.

### Dream state:

The company cultivates an environment in which change is welcome, processes are adaptable, and no one defaults to 'we've just always done it that way'.

# 73%

When ticket volume increased, 73% of high performers added help centre articles – 2.2 times more than under-performing companies.



### How you'll get there

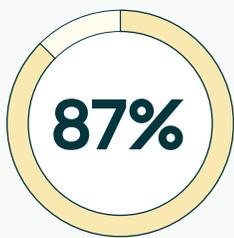
#### Drive collaboration and knowledge sharing

While CX integrations with partners like [Zoom](#), [Atlassian](#) and [Slack](#) saved the day when we suddenly shifted to remote work, collaboration remains a trouble spot for all businesses. Approximately 70% of agents at SMBs say that since the start of the pandemic, it takes more effort to collaborate with teams outside of customer service. Furthermore, 66% of agents at SMBs say that being able to collaborate with teams outside of customer service more easily would help them be more effective.

We explained how customer and business data shouldn't live in silos, and knowledge-sharing is one of the best ways to break them. For example, internal knowledge from the customer support team (answers for frequently asked questions or issues) might be used to populate a self-service portal. Knowledge management can help internally too by ensuring that information about products, tips and tricks is shared openly across teams and departments.

## Use automation to reduce redundant tasks and change management cost

Automation and scaling smartly go hand in hand. The more manual a process, the more difficult it will be to untangle it from other processes. This impedes the company's ability to provide great CX, namely because it makes people think that any change – even one that makes sense for the business to undertake for the good of its customers – is more trouble than it's worth. This is how processes become legacy processes – and bad operational habits.



**87%**  
of Zendesk customers are using automation capabilities.

CX teams can avoid this by placing bigger smarter bets: building processes and devoting resources to more scalable activities. For example, repetitive, data-driven tasks can and should be automated. The more these tasks are automated, the less time you'll need to allot for training and overhead if and when things change.

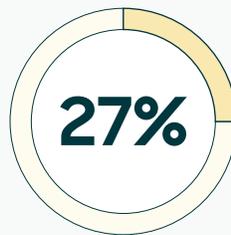
Remember: effort is not the same as work. Finding ways to eliminate repetitive tasks doesn't mean agents won't be productive. It means they have more time to spend on higher impact work that truly benefits customers in need, such as high pressure decision-making, contributing to knowledge management processes or working cross-functionally with other teams.

## Build out workflows to increase quality, transparency and control

Just as automations can take simpler minutiae out of an agent's day, better workflows can have a similar effect. Potential issues can be escalated to admins, and workloads can be more easily balanced across teams if there's a spike in demand. The result is smooth and seamless experiences for customers and agents alike. Process management tools, like SweetHawk and Myndbend, for example, can make new processes feel less painful and more like everyday business.

## Powering smarter business with AI and machine-learning tools

Extending the impact of automation across the customer journey can create more personalised experiences, reduce costs and thereby enhance CX overall. AI and machine-learning capabilities, such as chatbots or 'smart' digital assistants that serve customers the right help centre article or immediately connect them with an agent, are a must-have for any businesses with scalability in mind.



**27%**  
of SMBs say they are adding or expanding AI or ML capabilities.

Overall, almost three quarters of all bot interactions end up with a human. This isn't necessarily a bad thing; the issues that brought customers to an agent may simply have been too complex for self-service. Still, that figure may point to issues upstream. Perhaps the bot wasn't serving up accurate or useful answers – data shows that obtaining an accurate answer was the most highly reported frustration when interacting with a bot. All of this suggests that while customers prefer to use whatever solves their problems faster, when bots don't work, it leads to an especially frustrated one-to-one interaction – which doesn't help the agent experience or boost your CX credibility.

Empowering frontline teams with process and tools allows the entire CX operation to adapt and stay productive even when things are changing. The right technology is yet another way the business can build agility. Let's talk about those tools next.

# 03

## Invest in flexible technology that supports your CX goals

Agile companies rely on flexible tools that make change more cost-effective, faster and less painful for all involved.

### **Dream state:**

The business only invests in tools that value openness, seamless integrations and flexibility.



**[Successful companies] are defining industries rather than building on the status quo. This allows them to be nimble and use technology as a tool that helps them meet business objectives, as opposed to a system that drives how they run their business.**

Colleen Berube, Chief Information Officer, Zendesk

### **How you'll get there**

#### **Take advantage of open technology, inherently built for innovation and scale**

Remember what we said about manual processes that make it difficult to untangle from other manual processes? The same is true of the platforms on which these experiences are built. Any tech investment is a large one, and the most scalable option is an open flexible platform that helps ensure you won't have to take on time-consuming projects, come what may in the future.

Consider speed to market, usability and scalability for your tech investments when making the big decision.

#### **Unite your business by integrating with the apps and partners of your choice**

No business is an island. Being all things to all people usually isn't realistic and, as a business, it requires thoughtful collaboration with the right partners to augment your CX platform. Look for a CX solution that plays nicely with others – particularly apps and integrations that may be better suited to the task at hand. This practice also helps ensure the business is part of a larger ecosystem that evolves in the ever-changing digital landscape.

## Empower everyone to make changes with easy-to-use, low-code tools

Agility depends on both speed and effectiveness. If it takes several technical staff members and a lot of time to do something simple, such as build a new workflow or update a bot, you aren't being agile and your processes aren't scalable.

Remember that simple setup doesn't mean no setup. Companies may be tempted to rely on shadowing and team training to enable staff on new tools, but it's important to keep them in the loop and to clarify your expectations when changes are afoot. The best-laid plans can fail if no one manages the adoption process. Setting up workflows, conditions and triggers within your CX platform, with the help of partners like [Workato](#) or [Tray](#), can add to the seamless agent experience you're going for.

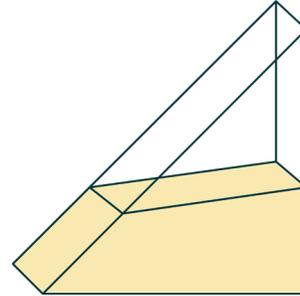
## Differentiating yourself as an agile small business

Small businesses arguably understand the importance of agile CX better than most. Many SMBs pride themselves on being closer to their customers and therefore better able to meet customer needs. While more one-to-one service breeds an enviable level of customer intimacy, one reason for building agility muscle is to retain that intimacy and high level of service as the business scales up.

The good news is that SMBs are already laying the groundwork for agility. Only 5% of SMB leaders report that making changes to customer service is challenging, but it requires constant vigilance to maintain that level of change management enlightenment. Here, we'll describe in greater detail the unique qualities, challenges and opportunities for small businesses embarking on their agility training program.

# 58%

Agility is linked to cost savings at SMBs – 58% of respondents said being agile saved them more than 10% in cost reductions.



Let's break it down using the same three pillars of agility we outlined earlier:

1. Make it easier to hear what customers are saying
2. Design your team to stay productive through change
3. Invest in flexible technology that supports your CX goals

## Make it easier to hear what customers are saying

[Benchmark](#) data shows that SMBs are prioritising conversational tools, such as social messaging, more than other business segments. This is good news; the data shows that customers under 40 are especially willing to spend more on a more personalised customer experience, which includes communicating with brands on channels they already use in their everyday lives.

Data shows that 31% of SMBs report that it's "not at all" or "only slightly" challenging to add channels, but only 52% of SMBs are supporting two channels. Agents prefer working in two channels – enjoying the work variety – and continued agent buy-in will be critical as additional channels are adopted and rolled out. Designing teams and processes to be nimble in the face of change can go a long way. Let's discuss that next.

## Design your team to stay productive through change

Becoming a knowledge-centred organisation is one of the best ways for a small business to scale smartly. Make it easier to turn support ticket answers into knowledge base articles, and have a knowledge management and maintenance process in place.

It might not seem like a big deal if processes are tracked on spreadsheets and shared documents, but it will definitely become a challenge to meet customer expectations as the company grows.

SMBs don't have the data they'd like; 43% say the data is only adequate to track customer service and KPIs. Furthermore, having a complete view of a customer is the most highly ranked challenge for SMBs, and almost a quarter – 23% – of agents at SMBs say they would like to add it as a capability. There's a great opportunity here for SMBs to give agents a more complete view of the customer experience, which will help ensure nothing is lacking in that experience as the customer base grows.

## Invest in flexible technology that supports your CX goals

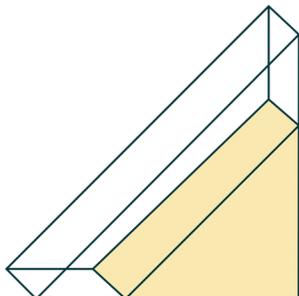
SMBs are more likely to have tools that enable them to make changes without code, or reliance on IT or developers, which puts them in an excellent position for an agile future.



of SMBs say their technology budget is expected to increase, with 5% expecting it to increase more than 25%

# 48%

Approximately 48% of SMBs report using automations and bots to streamline operations, which represents a definite uptick in recent years.



With small businesses already planning their budgets and teams with agility in mind, it's essential to build up an omnichannel support strategy. That means embracing messaging, adding apps and integrations to augment the experience, and deploying automations and AI to streamline the process wherever possible.

# Ready and able, come what may

Even the best training programmes have short-lived effects without strong fundamentals. Stay consistent and deliberate about listening to customers, streamlining teams and processes, and taking a disciplined approach to technology decisions to make CX agility a way of life.

Ready to take your agility training to the next level?

Start a [free Zendesk trial](#) to learn more.



Zendesk partnered with Dynata, a first-party data and insights platform, to conduct the market research cited in this playbook.