

How companies thrive after switching from Salesforce to Zendesk



Switching to Zendesk—and gaining innovation, agility, and superior experiences

The world is changing rapidly, and companies are rethinking how they operate and the tools they use. Cost optimization. Improving customer experience. Becoming more agile. No matter the size or shape of your business, this new distributed world requires more modern, digital ways of engaging with customers.

Support organizations that use Salesforce often reach a crossroads where they lack the agility and responsiveness their business demands. Unable to make the changes they need in a reasonable amount of time and within the constraints of their budget, they find they are paying a premium price, without a premium return.

Salesforce customers who are tired of escalating costs, rigid system configuration, and a lack of agility are choosing Zendesk. Moving away from costly, rigid, and complex implementations, companies switching from Salesforce to Zendesk gain a long-term partner that is dedicated to improving customer experiences, delivering agility, and keeping costs under control.

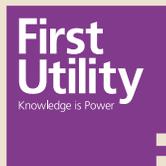
Zendesk is easier to implement, customize, and extend than Salesforce. Gone are the days of lengthy, costly IT projects. Our innovative solutions, point-and-click customization, out-of-the-box best practices, and industry-standard programming language make it easy for businesses to innovate and stay agile.

Finally, and most important, Zendesk does all of this while lowering total cost of ownership. Unlike Salesforce, Zendesk has lower, transparent pricing that includes all the components needed to deliver world class customer experiences. Implementations often take only days and weeks versus months and years. Zendesk is typically self administered and leverages industry-standard skill sets instead of requiring specialized, six-figure staffing.

The following customers switched to Zendesk and realized an array of benefits. See what switching to Zendesk can do:

- 1** First Utility
- 2** Prosper
- 3** Primex
- 4** LendingClub
- 5** Mediaocean

01 Lowering total cost of ownership and gaining a system to better support growth, drive efficiencies, and fuel innovation



700+

Advisors

800,000

Homes served

£2 million

Annualized benefit of switching

50%

Reduction in advisor onboarding time

20 seconds

Reduction in Average Handling Time (AHT)

Challenge

First Utility is the UK's largest independent energy supplier, providing over 800,000 homes with gas, electric, telephony, and broadband. Its team of 700 advisors work across channels including email, phone, chat, and social media.

Having evolved from different businesses, First Utility's customer service platform became very complicated and required interfaces with a number of different back-office systems. First Utility needed to simplify its advisory experience and gain flexibility to ensure it kept costs under control.

First Utility used Salesforce and as they neared the end of a three-year contract, they feared what many customers had experienced, which was a significant price increase. They decided it was time to seek an alternative solution.

First Utility needed a support solution that could:

- Empower agents with a simpler advisor experience
- Provide a flexible platform to support their growth
- Deliver predictable and lower total costs

Solution

By switching from Salesforce to Zendesk, First Utility lowered its total cost of ownership while seeing customer and agent experience gains. The easy to use interface empowered its team and improved productivity, resulting in an across-the-board reduction in Average Handling Time (AHT) time of 20 seconds.

First Utility is using the Zendesk API to integrate support with the Serenova telephony platform, an in-house billing platform, AskFirst (a homegrown chatbot), Cloudset for SLA management, and its data and analytics platform. First Utility has seen significant reductions in its cost of administration as compared to Salesforce and they continue to develop Zendesk applications that are replacing outdated, slow systems that help advisors help customers more efficiently and effectively.

Solution Benefits:

- Empowered the team and improved productivity
- With the streamlined, lightweight API, gained the flexibility to connect disparate systems
- Reduced the cost of software licenses and development resources

Impact

First Utility gained a flexible system that is easy to build on. They are able to approach new development to streamline processes because projects no longer require significant and costly time and resources. This has helped internal stakeholders see the opportunities and there is now considerable internal support and excitement about the Zendesk transition.

First Utility now has:

- Reduced advisor onboarding time by as much as 50 percent
- Decreased call Average Handling Time (AHT)
- Customer Service of the Year award for the utilities industry
- Realized a £2 million annualized benefit from switching, which it expects to grow as additional apps are developed to replace the systems advisors use today



"I definitely feel like I've been listened to as part of this journey, and we all see our relationship with Zendesk as a strategic partnership rather than just a business buying products off another business."

Rob Harris

Head of Customer Service Platforms



02

Moving to Zendesk for innovation and time to value—lifting CSAT 10%

The Prosper logo features the word "PROSPER" in a grey, sans-serif font. The letter "O" is replaced by a stylized icon consisting of two overlapping circles, one orange and one pink.

50% reduction

Onboarding time

+10%

Overall CSAT improvement

Innovation

#1 reason they chose Zendesk

2 weeks

After launch, Chat became highest-volume channel

Challenge

As America's first marketplace lending platform, Prosper enables people to invest in one another. Working toward the success of the company and its customers, Prosper is committed to being as prudent about investments as its customers are about their loans.

After using Salesforce for eight years, Prosper was suffering from service and technical interruptions and their vendor relationship was deteriorating as fast as costs were skyrocketing. With already high license costs, Prosper saw increasing charges for its API use and knew it needed a better, more affordable answer.

Prosper needed a support solution that:

- Offered robust uptime and support
- Lowered its total cost of ownership and didn't penalize it for things like API use
- Would help it to innovate and grow

Solution

Prosper chose Zendesk for its innovation, and also for ease of deployment and time to value. Prosper got its Help Center up and running almost immediately and was able to support and administer the system with resources they already had on staff. With reduced onboarding time, the Zendesk system immediately benefited the team as it quadrupled in size. Chat allowed Prosper to easily scale, and Prosper's overall CSAT has improved by 10 percent.

Solution Benefits:

- Reduced overall costs
- Onboarding time was reduced by 50 percent
- An ability to deflect more support interactions through Chat
- Predictive analytics to help address outcomes proactively

Impact

Prosper switched to Zendesk and gained a true enterprise partner that has been able to support its rapid growth and help it optimize customer support. Prosper was able to get out from under its technical challenges with Salesforce, as well as the increasing license and API costs. It migrated eight years of data into its Zendesk implementation to give its team all the information needed to provide excellent support. Using Chat and predictive analytics, they improved their overall customer experience.

It has rapidly built out Help Center content that ensures customers and agents are provided with the information needed to solve any issue. With Zendesk, Prosper was able to “build, launch, and sustain something for the long haul.”

Prosper now has:

- The ability to administer Zendesk with existing resources
- CSAT gains of over 10 percent
- The agility to test innovative approaches
- A trusted, reliable partner that helps it optimize customer support



“In one of the first conversations we had with Zendesk, we heard, ‘We can help save you money and do this smarter and better.’ It wasn’t about maximizing the profit on a deal with us. After that, Zendesk continued to be a consistent presence and even over delivered.”

Brian Taylor

Sr. Director Customer Experience

PROSPER

03

Switching to Zendesk advances visibility and upgrades customer experience



160,000

Customers supported

70

NPS®

7K

Average tickets/month

29 minutes

First reply median time

2 months

Go live after switch

9.39 out of 10

Maintaining higher satisfaction

Challenge

Primex is one of the leading business solutions for critical notifications and environmental monitoring, serving more than 160,000 hospitals, schools, and private businesses. With Salesforce, its customer and business partner support was suffering from an inability to accurately assess how long agents were taking on tickets as well as an inability to pull accurate and complete reports.

Primex was manually creating tickets and found that they were missing a lot of information. It knew it could provide better support with more robust self service options that would scale its agents and address basic troubleshooting questions. About to hit its busiest time of year, Primex knew it needed to move from Salesforce to a vendor that would offer additional support functionality and robust reporting. It chose Zendesk.

Primex needed a support solution that:

- Could help it create a robust self-service offering
- Offered robust reporting to help optimize staffing
- Provided integrated chat and phone support

Solution

By implementing Zendesk with custom Magento integration for complete business context, Primex was able to immediately connect teams and ensure everyone was on the same page. By sharing the same customer or partner context, they improved the customer experience. Primex now offers more channels to customers for support, including email, chat, social media, and they all flow into one complete customer profile. Zendesk reporting enables robust reports on agent workload and work time to completion, helping Primex optimize staffing.

Solution Benefits:

- Customer experience gains by providing complete customer context
- Freeing agents from many manual tasks
- Detailed reporting that helps them forecast and optimize staffing
- Connecting internal teams to help escalate and solve issues faster

Impact

Primex gained the ability to better support its customers and business partners, with multi channel support, self-service, and better customer context. Waiting times have been reduced, and it is able to optimize its staffing. Improved visibility ensures that it can identify when issues are taking too long to resolve and then connect the internal teams to escalate the issue and get it addressed, a key requirement in a time-sensitive industry.

Primex now has:

- Improved SLAs due to better visibility, information sharing, and internal team connectivity
- NPS® of 70 and CSAT of 9.39
- Better visibility to help identify issues and optimize staffing
- Deflected tickets by providing robust self-service capabilities



“Being able to easily grab customer information without having to search through hierarchies in Salesforce to try to figure out where something is located has been a big help and a time-saver.”

Beth Frye

Project Manager



D

4

Switching to Zendesk improves borrower experience and lowers costs



600

Agents

50,000

Tickets/month

+275%

Email efficiency

12%

Answer Bot resolution

9 days

Up and running

11:1

Self-service to ticket ratio improvement

Challenge

LendingClub connects U.S. borrowers and investors through an online marketplace that offers ethical and easy ways to access credit. The organization is inspired to help empower those who want to achieve financial success.

Providing an engaging and relationship-oriented borrower experience is key to their success. Salesforce, its previous system, did not facilitate agents focusing on borrowers during a call. It required them to create new records and take multiple steps to work through and document a call. LendingClub was also unable to easily report or get data on customer satisfaction or agent performance.

LendingClub needed a support solution that:

- Supports an engaging borrower experience
- Provides visibility to customer satisfaction, agent performance, and other metrics
- Is cost effective, configurable, secure, and meets its legal requirements

Solution

After a thorough evaluation, Zendesk won LendingClub's business by offering significant cost savings with light agent roles, as well as a superior agent experience, which would by extension improve the borrower experience. Zendesk also offered the required configurability.

LendingClub implemented Zendesk in just 9 days. Training and onboarding took very little time and it's easier handling of work queues allowed LendingClub to set triggers and automation to flag cases to train new agents. It uses the Zendesk API to integrate its Cisco phone system. It has increased efficiency because the user interface eliminated extra typing and clicks, allowing agents to get to customer needs as soon as possible.

Solution Benefits:

- Great ticketing, workflow management, queueing, and grouping builds a stronger borrower experience
- AI-powered Answer Bot helps address quick questions and deflect calls
- The Help Center and Apps makes it easier for customers, while keeping their financial and personal data secure

Impact

LendingClub easily migrated to, and onboarded, Zendesk, increasing agent efficiency through ease of use, application extensions, integration, macros, and AI. LendingClub is now able to effectively point customers in the right direction to find solutions independently with Answer Bot. It is able to easily create specialty queues and prioritize time-sensitive customer emails, ensuring tickets that offer the most value to customers are actioned immediately.

The team is able to make changes immediately without waiting on expensive IT resources and lengthy projects.

This agility enables LendingClub to focus on providing a superior borrower experience and easily line up the technology to continue to optimize it.

LendingClub now has:

- All the necessary tools for agents to focus on providing a superior borrower experience
- AI-powered service using Answer Bot for automated replies
- Robust analytics for a view of individual agents' productivity
- The tools and agility to provide customers the support they need



"LendingClub is committed to using technology to drive superior borrower experiences... Zendesk is great because it's highly configurable, and the data reporting is easy to build, even if you're not an extremely technical person. And whenever I had a request, I always felt Zendesk was willing to help me get to a speedy resolution."

Andrew Jensen

Director, Payment Services



05

Switching back to Zendesk uplevels how customers experience their business



98
CSAT

+40%
Increase in employee satisfaction

2 months
To be up and running

305%
Increase in self-service

Challenge

Mediaocean is an advertising service and software company, headquartered in New York City, with over 1,000 employees serving over 80,000 clients in 77 markets. Its team of 120 customer service specialists handle an average of 26,000 tickets every quarter, over half of which are submitted by email.

After five years with Zendesk, Mediaocean was acquired and given a mandate to move to Salesforce. Spending ballooned as employee satisfaction and self-service plummeted. Armed with data, Mediaocean made the decision to move back to Zendesk. Employees stood up and clapped; customers wrote in to thank them.

Mediaocean needed a support solution that:

- Addressed the drop in NPS scores it experienced after moving away from Zendesk
- Was effective, affordable, and easy to implement and provided an excellent agent experience
- Required less administration and removed the system limitations it saw with Salesforce
- Enabled productivity improvements for its customer support and administration teams

Solution

After seeing significant hits in employee satisfaction and web portal usage after moving to Salesforce, Mediaocean compiled an analysis of the issues the team faced. Salesforce's response was that many of the issues would require costly, time-consuming configuration or customization changes. Mediaocean analyzed the list against Zendesk capabilities and found that 90 percent was available out of the box from Zendesk.

Even though it was in the middle of its Salesforce contract, the team made the case that a return to Zendesk would benefit the service team and the company almost immediately. While expecting challenges during migration, there were none — it was a seamless process. Mediaocean took the opportunity to improve its configuration and processes, implementing Guide for its knowledge base and Zendesk Apps for tracking ticket component levels and managing client SLAs. They were back up and running on Zendesk within two months' time.

Solution Benefits:

- Significantly happier agents and customers
- 20 percent increase in the number of articles created over the past year
- Deep integration with the rest of the business — Salesforce, Jira — without the maintenance and overhead of IT admins
- Lowered costs, with end-user license and administrator time savings worth over \$100K

Impact

When Mediaocean moved away from Zendesk, customers were unable to find and effectively use self-service content, with usage dropping 75 percent. After returning to Zendesk, adoption increased by 354 percent within one month. Video usage also skyrocketed and Mediaocean's improvement in self-service content helped them increase the number of tickets they were able to deflect. In this same time, Mediaocean saw client satisfaction scores rise to 98 percent.

Implementing Zendesk enabled Mediaocean to speed content creation and approval. The entire company is able to see the knowledge base, and creators are able to solicit feedback before posting. Since redeploying Zendesk, the number of articles generated has increased by 20 percent.

Mediaocean also saw a big impact in employee NPS scores. NPS had dropped 20 points when they moved away from Zendesk. It then returned to its previous state, and then increased by another 20 points, a net gain of 40 points, upon returning to Zendesk.

Mediaocean now has:

- Experienced an upsurge in customer and employee satisfaction
- Increased Help Center usage by 305 percent
- Achieved an agent attrition rate of less than 3 percent



"We saw a greater ROI in Zendesk versus the other options. We did a cost analysis and showed how we were going to save money and increase productivity with Zendesk...I actually get emails from clients saying they want to thank us for going back on Zendesk, that this is the best thing we ever did."

Stephanie Dorman

Senior VP of Client Services



Conclusion

Simply put, Zendesk offers a superior solution for creating better agent and customer experiences. Salesforce customers who are tired of escalating costs, rigid system configuration, and a lack of agility are choosing Zendesk. They're also seeing significant benefits — from CSAT to agent efficiency to self-service — almost immediately. With Zendesk, businesses are able to deliver exceptional experiences that take advantage of the latest technology, provide omnichannel service, and remain easy to use, all at a fraction of the total cost required for their previous Salesforce implementations. And they no longer have to rely on specialized, high-price-tag administration and development resources for daily maintenance or when they need to make changes.

With Zendesk's flexibility, cost effectiveness, and rich toolset, companies are able to tailor their support experiences not to merely satisfy their customers but to develop long-term relationships with them. In an increasingly crowded marketplace, focusing on customer experience can be the competitive advantage that separates your business from competitors. Customers who have switched from Salesforce to Zendesk are now focused on the potential of doing even greater things with Zendesk moving forward and are happily glancing back at Salesforce in the rearview mirror.

Get started here:
zendesk.com/contact/

