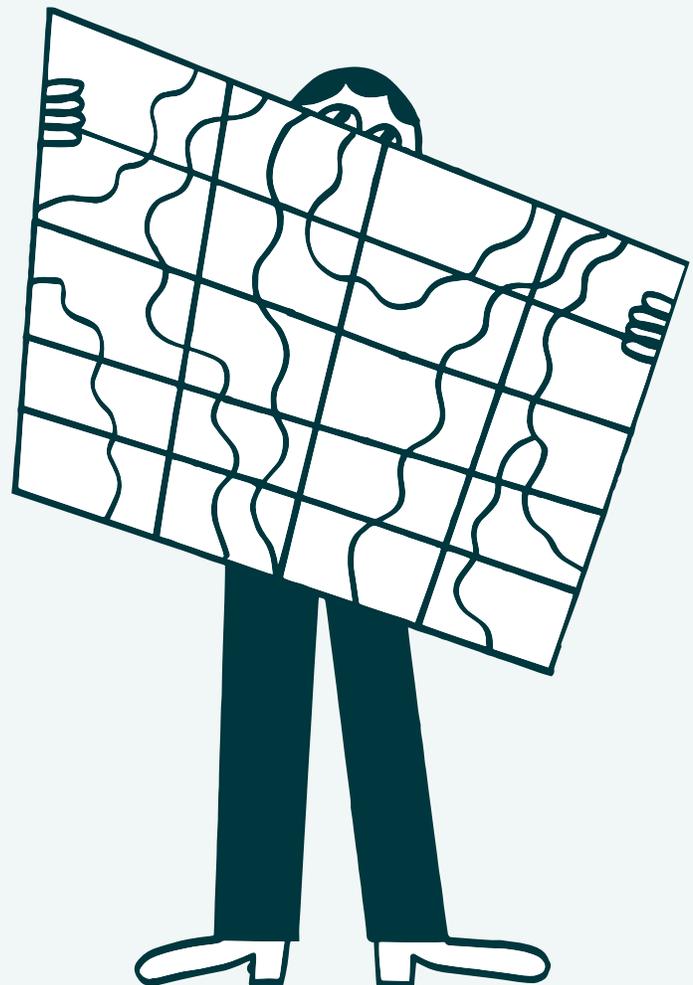




Getting started with Explore

- your guide to customer analytics



03

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Customer interactions are producing more information than ever, providing businesses with greater insights into who their customers are, how their customers use specific products and services, and how their customers seek help.

Understanding these details from both a bird's-eye view and deep-dive perspectives can help drive a high value initiative: providing customers with a better customer experience.

Building those better experiences begins with how your organization approaches analysis. It means knowing what needs to be measured and how those measurements constitute success. It involves figuring out how information should be shared and how it's presented to different stakeholders. Improving customer experiences means ongoing analysis, so your analysis has to be designed to scale with your organization's growth.

Zendesk Explore is an analytics product that helps businesses measure and improve the entire customer experience. Explore ties together data

from every Zendesk channel, to give customer experience leaders a complete view of how customers interact with their business.

In this guide, we will cover a variety of topics to help your business get up and running with Explore quickly. We'll cover:

- **Key topics and best practices for getting started**
- **What comes out of the box: pre-built dashboards, the query builder, and the dashboard builder**
- **How you can customize Explore to fit your needs**
- **How you can share your findings with your organization**

01

Pre-built dashboards and user roles



Your usage of Explore will depend on your business's goals and the key performance indicators (KPIs) that are used to measure how you're tracking towards the success of those goals. Every organization will have different goals; for example, a retail business might want to focus on responsive chat support while a software company will be more invested in its self-service offerings.

Before setting up Explore, the first thing to know is which metrics can effectively measure the success of your business's goals—namely, the ones that'll guarantee you're making smart business decisions. As your business evolves and scales, you may find that some metrics hold more importance over others. A great introduction to the types of metrics found in Explore is available in our guide [“Customer service metrics that matter”](#). If you aren't sure where to get started, Explore can help show you the way.

Pre-built dashboards

The Explore team has spent countless hours researching best practices in customer experience analytics and have transformed their learnings into a set of **pre-built dashboards** that come right out of the box with Explore. These dashboards include important metrics and capabilities for customer experience leaders who want to optimize their operations, improve efficiency, and better understand their customers—across every channel that your business uses to support customers.

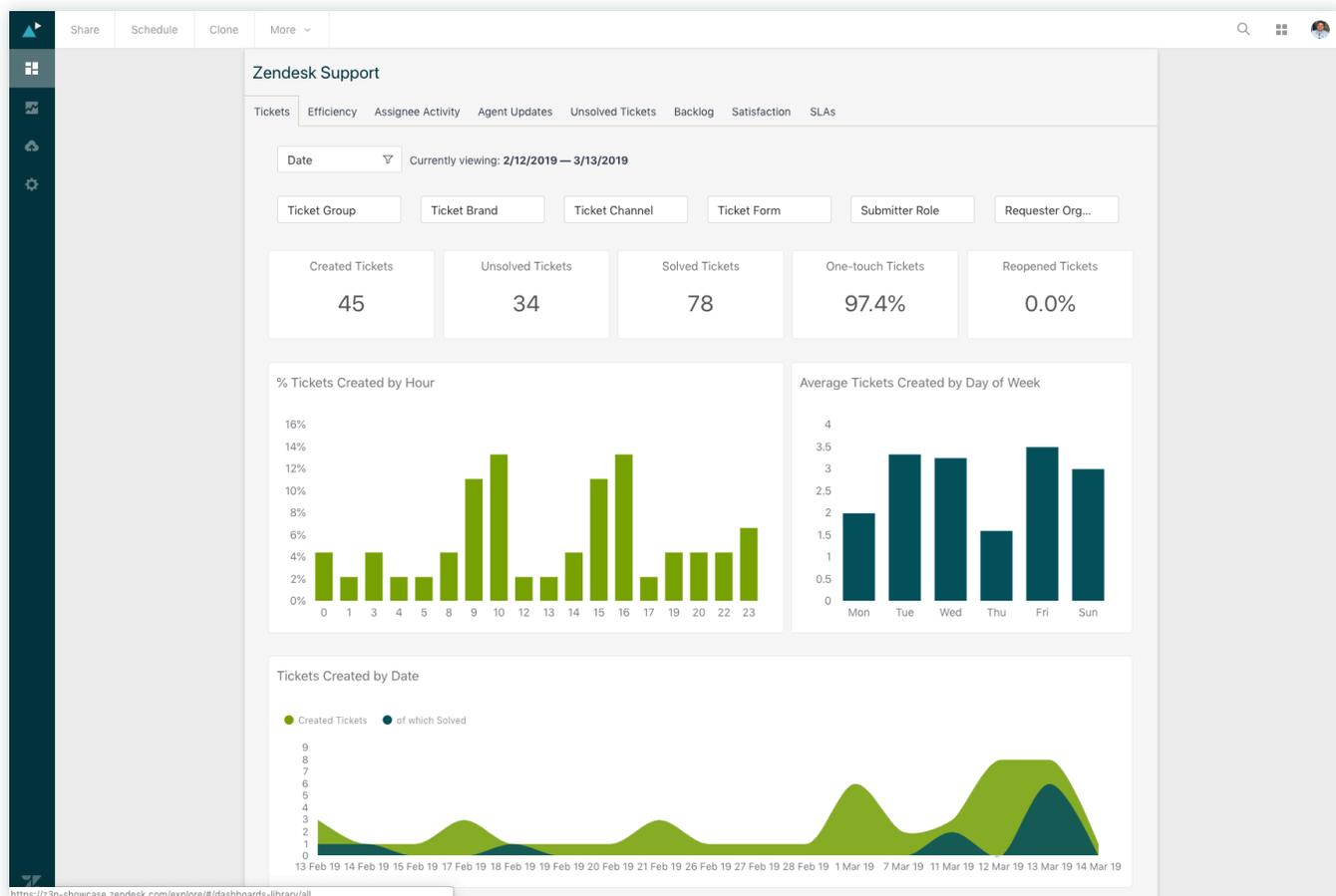
Many organizations who are just getting started with customer analytics use Explore's pre-built dashboards exclusively, while others with more granular customer analytics need them as templates for their own customized analysis (which we'll cover later on). Pre-built dashboards can be a great foundation of your customer experience analysis—each one provides necessary information related to your organization's efficiency and your customers.

Understanding pre-built dashboards

A pre-built dashboard is available for most Zendesk products that your business uses. To ensure these dashboards provide a stable foundation for your analytics, it's not possible to edit them—however, they can be filtered to display specific information, like data fields and date ranges.

We'll walk through all four of the pre-built dashboards to help you understand what's provided in each:





The pre-built Zendesk Support dashboard provides key ticketing, agent, and customer satisfaction (CSAT) metrics.

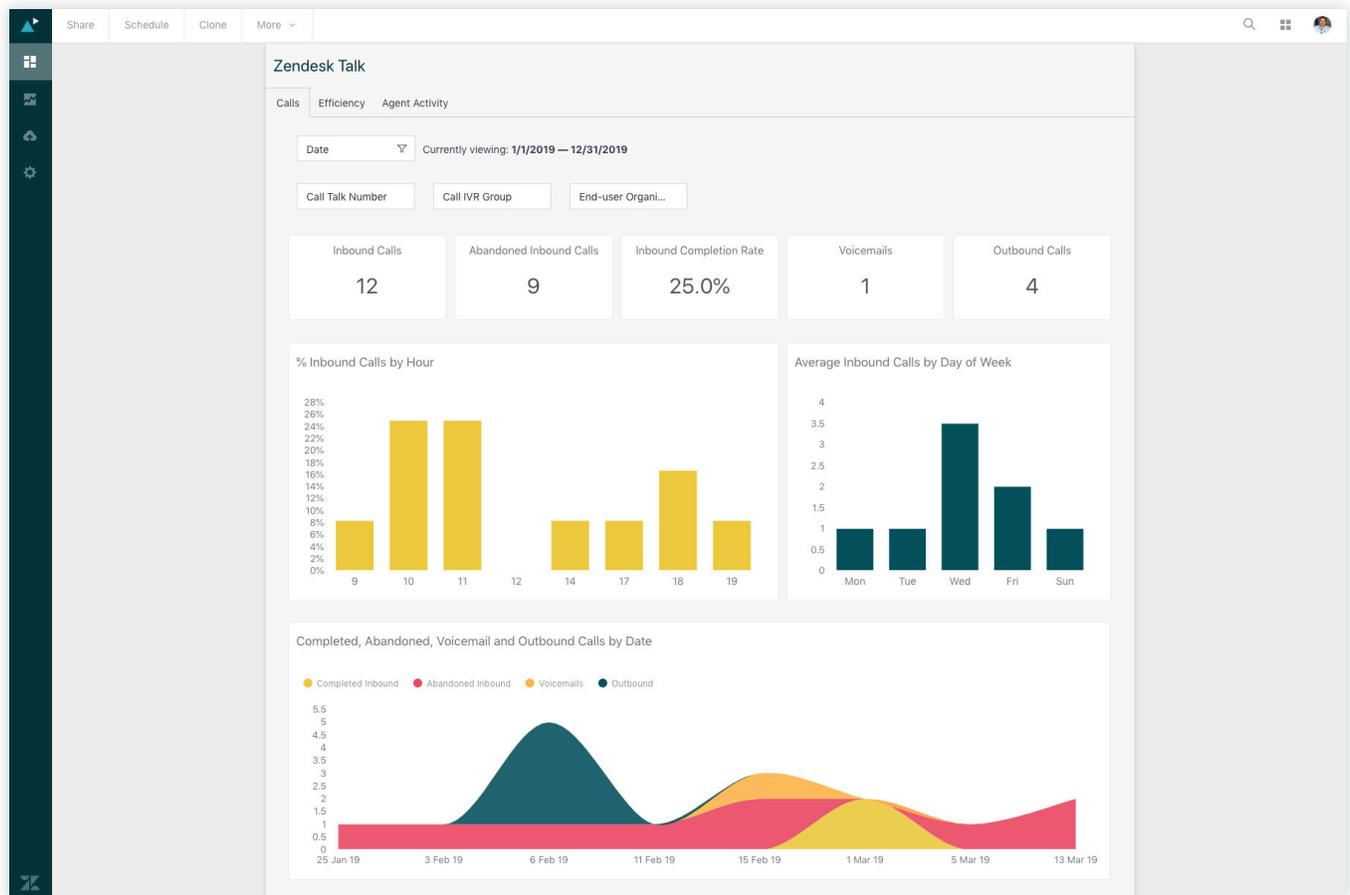
Efficiency: How efficiently agents solve tickets is measured with key ticketing and time-based metrics, like *tickets solved* and *average handle time*.

Agent Activity: Performance metrics and how active agents are when making updates to tickets. Individual agents can be selected to review their performance.

Unsolved tickets and backlog: Includes metrics regarding tickets waiting in your team's queue and a snapshot of the Backlog. The Backlog allows you to view historic data and analyze past trends.

Satisfaction: CSAT information to help your team understand what drives positive interactions and what can be done to save negative customer experiences.

SLAs: Displays success of meeting service level agreement (SLA) policies. This only works if you have active SLA policies to include in the dashboard.

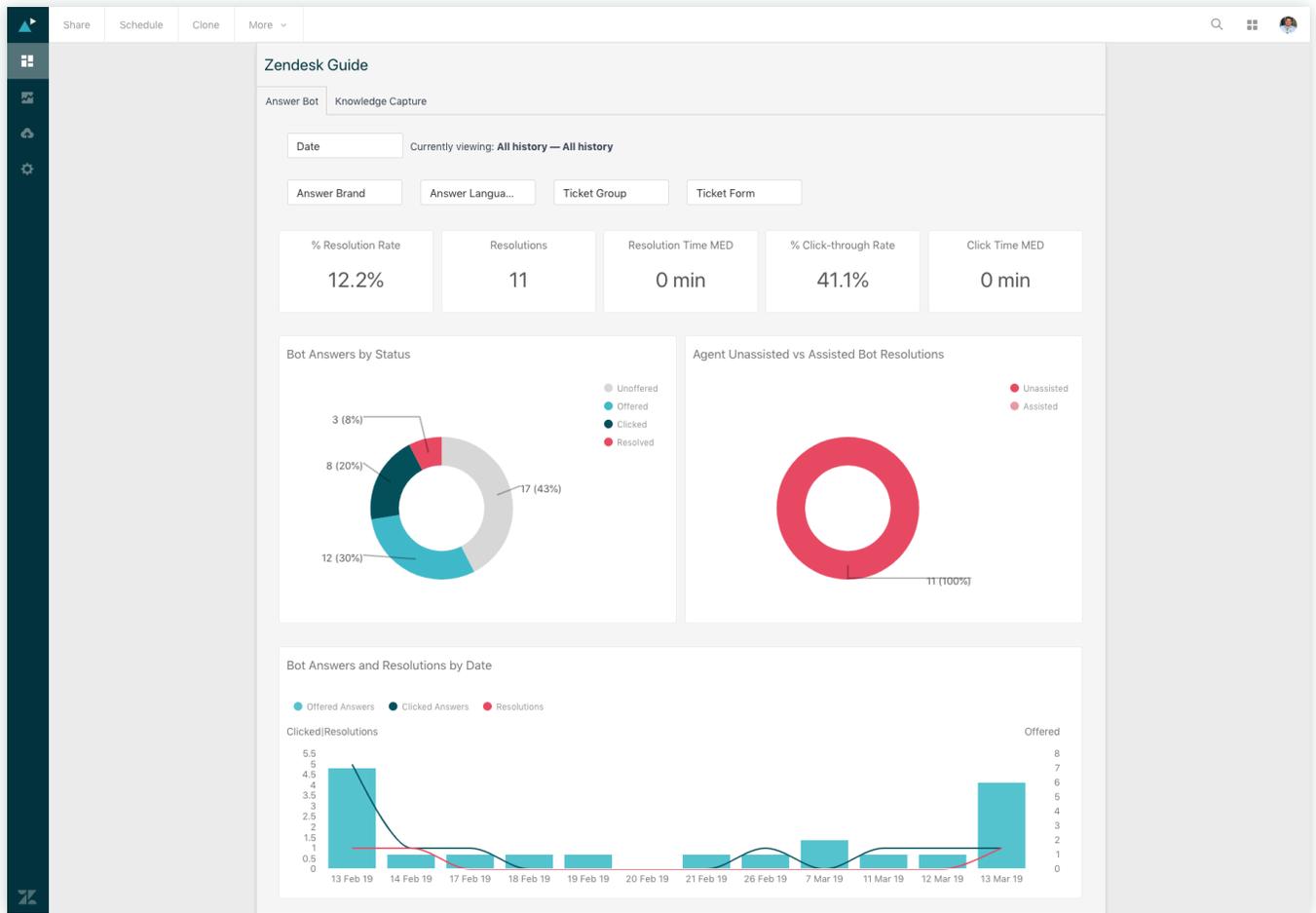


The pre-built Zendesk Talk dashboard covers key phone support metrics and the efficient of agents serving customers over the phone.

Calls: Displays information for Talk calls that agents made and received. This data can be filtered by dates, Talk numbers, IVR groups, and the end user's organization.

Agent Activity: Information regarding the agent's activities, like how many calls they've received. This data can be filtered by dates, agents, the call direction, Talk numbers, and IVR groups.

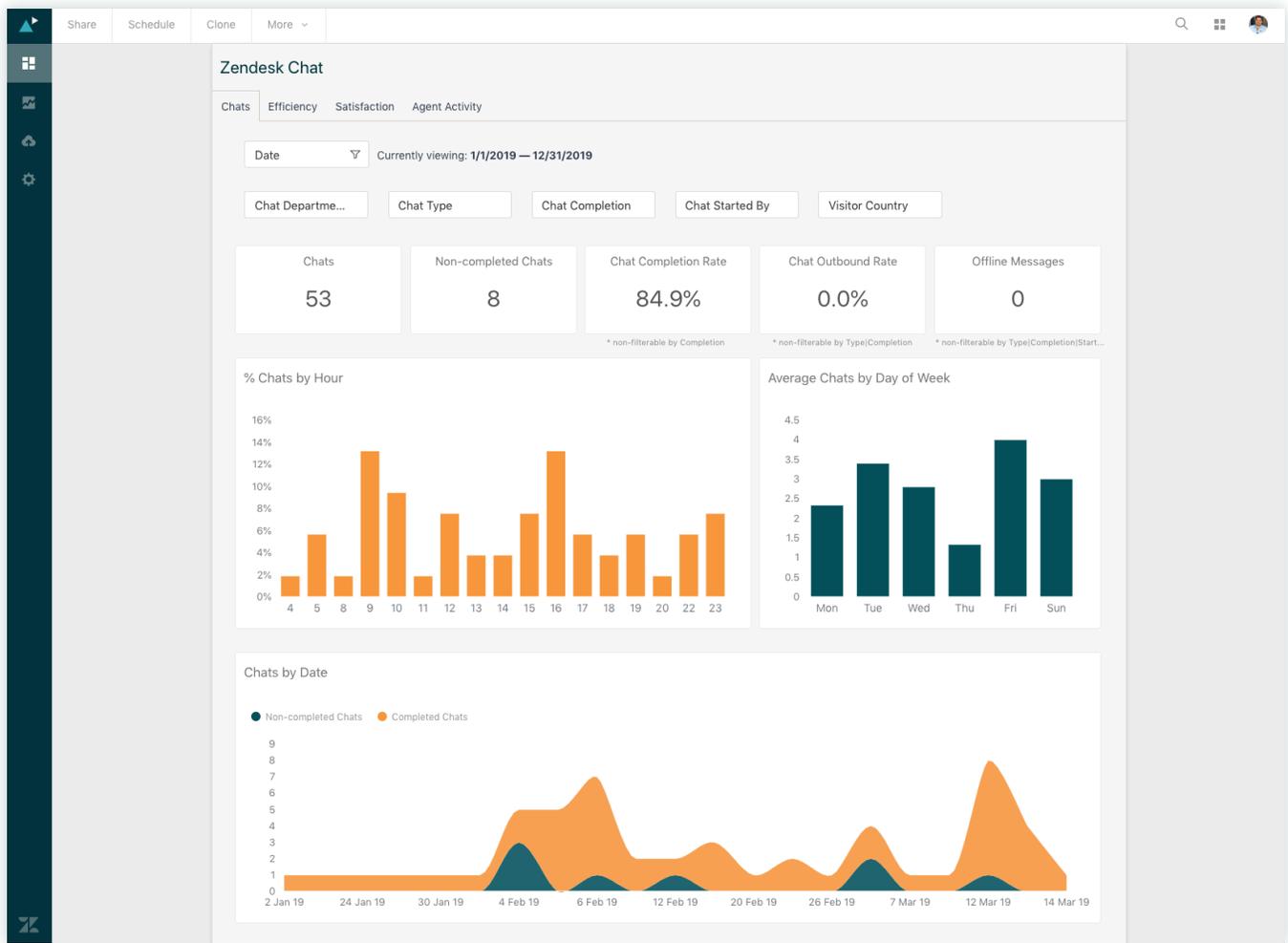
Efficiency: How efficiently agents are solving tickets with key ticketing and time-based metrics. This data can be filtered by dates, Talk numbers, IVR groups, and the end user's organization.



The pre-built Zendesk Guide dashboard includes metrics that highlight the success of your self-service efforts.

Answer Bot: Answer Bot is Zendesk Guide's AI-powered assistant that recommends help articles depending on what a customer needs help with. You can review its resolution rate, average time to resolution, click-through rate, and its activities regarding assisting agents and article recommendations.

Knowledge Capture: The Knowledge Capture app lets agents use content directly from help articles in their support tickets. The dashboard will display details like the articles that were linked from, articles created using the app, and agent engagement with the app.



The pre-built Zendesk Chat dashboard include details into the success of your chat support:

Chat details: Information regarding the Chat sessions made and received in your organization. You can filter these reports by date, department, type, completion, and who started the chat.

Efficiency: Data that helps you gauge the efficiency of your agents using Chat. These metrics can be filtered by date, department, type, completion, and who started the chat.

Satisfaction: CSAT scores as a result from a Chat session. You can filter these reports by date, department, type, completion, and who started the chat.

Agent Activity: Displays information regarding how often and how successfully agents are engaging with customers through Chat. These reports can be filtered by date, department, specific agents, who started the chat, and assignment.

User roles

Every user of Explore needs a user role. After activating Explore, users can be given a designated user role specifically for Explore.

When choosing employees for roles in Explore, make sure that the permissions being granted will best fit your workflow—for example, those who would benefit from Explore’s insights but are focused on other responsibilities (not strictly data analysis) probably only need view permissions. Those who are chosen to be Editors and Admins should be well-versed in data analysis and what Explore can offer.

The 3 types of user roles



Editor

An editor is the best role for users who need to do the following tasks:

- Create and customize new dashboards, queries, and datasets
- Edit create and shared dashboards, queries, and datasets
- Share dashboards with viewer groups
- Set dashboard email delivery schedules



Admin

The admin role has the same permission as editors with the following additional capabilities:

- Update editor permissions for dashboards, queries, and datasets
- Change the default colors for charts and color-encoded metrics
- Edit Excel settings when exporting dashboards
- Enable or disable access to the account by the Zendesk customer service team

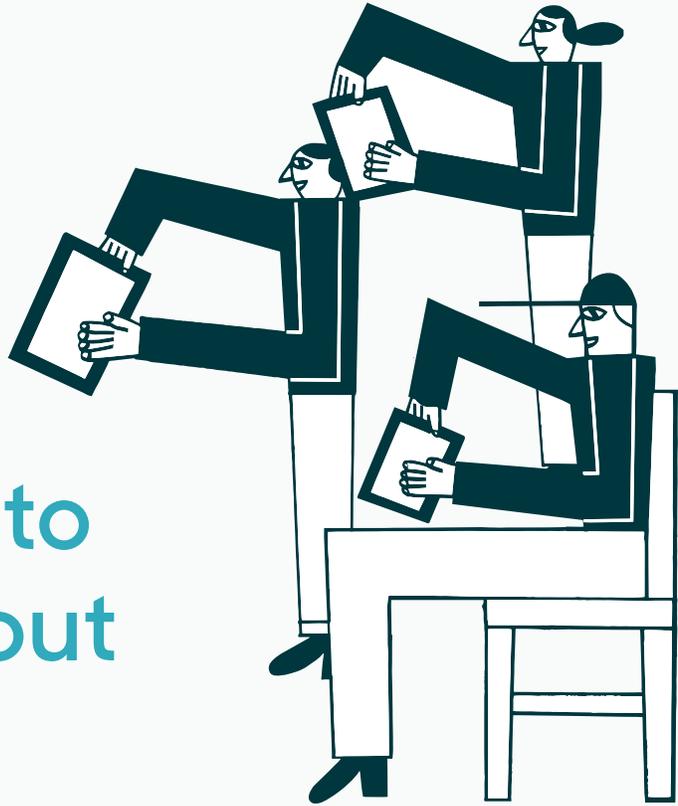


Viewer

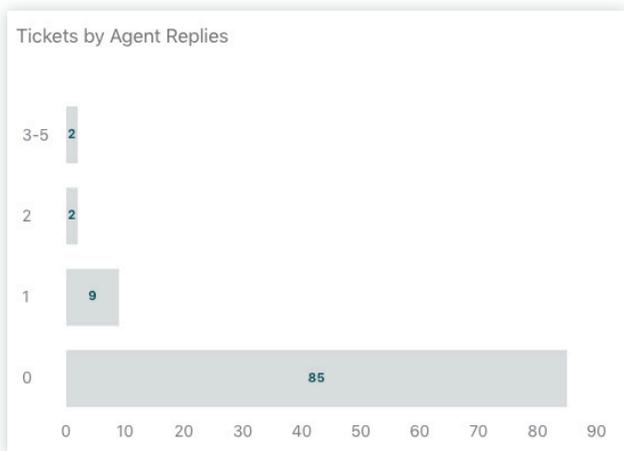
A viewer can’t edit or create dashboards—they can only view dashboards that are shared with them. They’re also unable to view individual queries or datasets.

02

Using queries to get the most out of your data



In Explore, your data is displayed in the form of customizable reports, or *queries*. Queries are, essentially, questions that you can ask of your data displayed in the form of a data visualization. That's a mouthful, so we'll just stick to queries. The pre-built dashboards in Explore already contain some pre-built queries. Here's an example:



Queries are composed of metrics and attributes, which are basically *what* you want to count and *how* you want to count it. Explore's queries **must** contain at least one metric, as there needs to be at least one element of data to measure.

If you want to create your own queries, first you must define the data source containing the information that will be used. Explore uses what are called *datasets* that connect information about Zendesk products like Support and Talk. Zendesk has done the heavy lifting and created detailed datasets with a wide variety of custom metrics and attributes that your business can analyze. You can even create your own metrics in Explore.

What to ask of your data

Think about the takeaways from your data analysis that would be the most impactful in your organization: do they involve hard, quantifiable facts? What about qualitative data that highlights context on those facts? Best chances are that for a complete picture of the customer experience, you'll need a combination of both.

Explore's queries contain two distinctive elements, one for quantifiable data (what you want to count) and the other for qualitative data (how you want to count):

- **Metrics:** Quantifiable data like the number of tickets, first response times, full resolution times, and CSAT scores
- **Attributes:** Qualitative data like dates, groups, and types of issues for categorizing. These "slice" the results from your metrics by the values in the attributes

Much of your analysis in Explore will be related to metrics, providing the quantifiable data that indicates success within your organization. But how you apply attributes to that data is how you gain necessary context, making your data both quantifiable and qualitative.

Here's an example: customer experience leaders want to know how many support tickets are being generated—that can be seen with the # Tickets metric in the Zendesk Support dashboard.

If you add the Ticket Group attribute to "slice" the data from # Tickets, the data is then displayed based on issue types, highlighting the areas that customers struggle and need more help with (based on how your issue types are defined).

To have that granular understanding of customer difficulty is the sort of qualitative context that can improve the customer experience—perhaps it provides evidence for better self-service offerings or ongoing agent training on those specific topics. You could also relay your insights to your Product team so they know how customers are struggling with their products or services (for future improvements).

Ask of your data what will provide the most important insights that help you track towards the success of your business's goals. The more clear that you can make those insights to stakeholders, the more that your business will understand the cause of your customers' outreach, where they're struggling with your product or service, and what needs to be done to improve the customer experience.

Customizing and visualizing your data

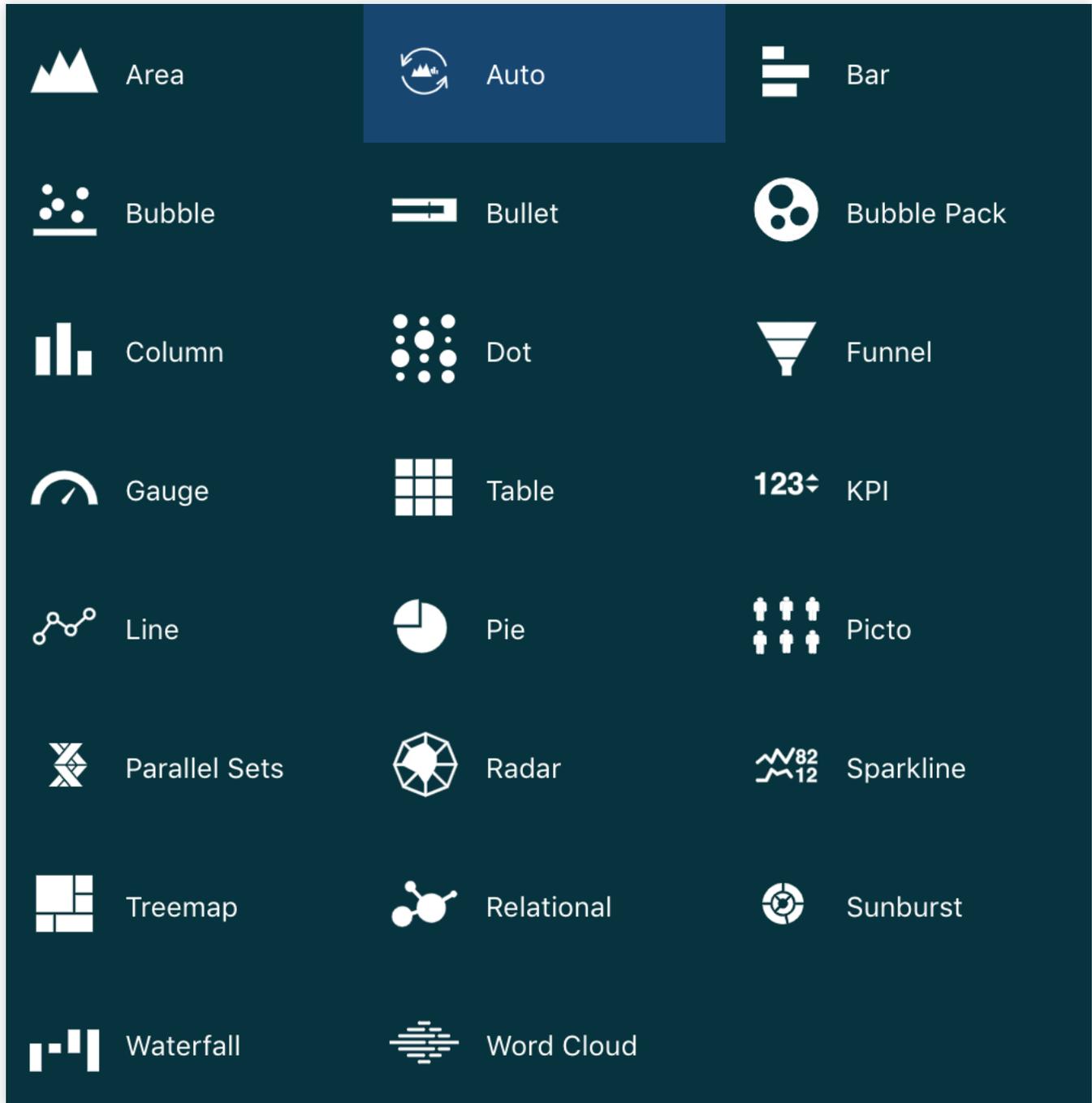
There are many ways to slice and dice data; as so, there are many ways to display your analysis so that the story you're trying to tell can be properly conveyed to your audience. When building out a query, there are four ways to adjust how your data is displayed:

- **Columns:** displays data horizontally. This is best for analyzing comparisons or a time series
- **Rows:** displays data vertically. This works best for evaluating comparisons or compositions
- **Filters:** restricts which results are shown without the specific attribute
- **Explosions:** renders data into multiple charts, each representing a different value for the added attributes. Best for analyzing something that would require different metrics or attributes to fully understand



Visualization Selector

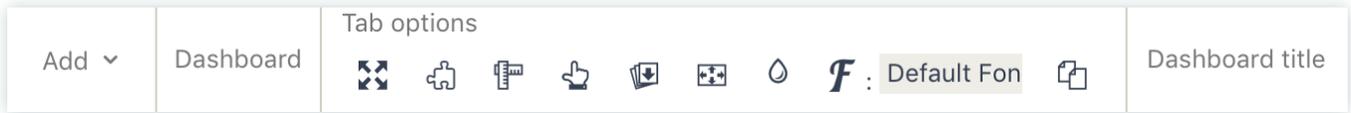
Explore will automatically choose the best visualization to represent your data based on the metrics and attributes used, but you may want to adjust it based on your particular circumstances. You can change the chart types to best fit the displayed data. This feature is called the **Visualization Selector**. Feel free to play with it and view the various data displays:



“Zendesk Explore makes it easy to analyze data by just picking the right chart type for me.”

Jennifer Linkenauer

Technical Operations Analyst at GoSpotCheck



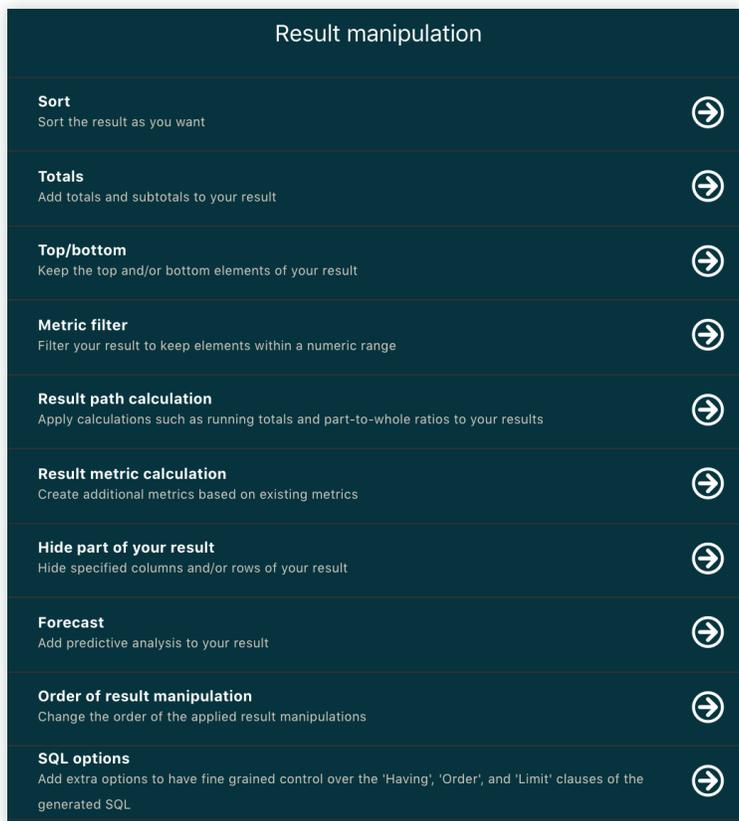
Customizing a query

After adding the metrics and attributes you'd like to analyze, you can customize the query in a way that best represents your data and suits your business needs. The three available customization option menus are on the right of the Query Builder.

In addition to visualizations, you can customize your query using the chart configurations menu. It contains all of your primary customization options, such as chart color, text formatting, and additional options unique to each type of visualization.

Result manipulations for easy calculations

Result manipulations are a way to apply calculations without having to write any formulas with a query. Think of it as additional calculations on top of the currently displayed metrics, for deeper dives into your data. You can apply calculations like totals, percentage differences, and choose how the calculations affect future results.



Creating custom metrics and attributes

You can create custom metrics and attributes, called **calculated metrics** and **calculated attributes**, to apply more detailed and advanced calculations to your results. These calculated metrics and attributes can be added to your dataset, and then your query, so you can:

- Create unchanging results for your metrics
- Rename attribute values or place attributes into logical groupings
- Create completely customized metrics and attributes

To create custom metrics and attributes with specific functions, you'll have to use Explore's easy-to-use formula writing language.

← Standard calculated metric

Type formulas to create new custom metrics

Name

Ticket with "Shoe Help" Tag

Formula **Format** ✓

```
1 IF (CONTAINS([Ticket Tags], "Shoe Return")) THEN
2 1
3 ELSE
4 0
5 ENDIF;
```

Fields Functions

Select a field Add

Step-by-step: building a query

01

Choose which metrics you want to include

02

Choose the attribute to be represented in by column (like something over time)

03

Choose which attribute to be represented by row (what will describe the metric in more detail)

04

If applicable, choose an Explosion or Filter option to affect how your results are displayed

05

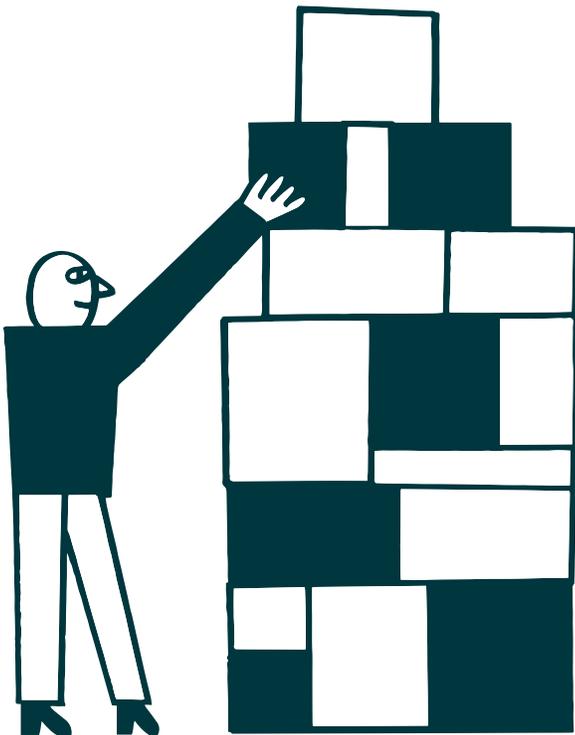
Choose a chart type

06

Choose the coloring of your data

07

Save it to an existing dashboard, or use the query to create a new dashboard



03



Creating a custom dashboard to fit your needs

Explore's customizable dashboards provide more possibilities into how you view your customer experience data, enabling your organization to continuously adjust your analysis and socialize it with other teams. They'll accommodate your own queries and datasets, allowing you to visualize and measure your data across multiple aspects of your business.

Custom dashboards can be treated as a way to highlight and share information with other Zendesk Support users—depending on how you choose to measure and display your data, you can make it very easy for Support users to analyze and organize that data. The customization features for dashboards including arranging tabs for optimal organization of reports, adding filters, choosing your own text, and more.

While pre-built dashboards are always view-only, Editors and Admins can create and collaborate on custom dashboards.

There are two ways to create a custom dashboard:

01

Clone a pre-built dashboard and customize it with your own queries and filters

Why create a dashboard this way?

Starting with a pre-built dashboard provides a template that you can build off of—a great approach for those who are learning Explore or have less complex needs. There's a good chance you'll grow familiar with Explore's capabilities through the pre-built dashboards, which will give you a sound understanding of how you might like to build your own.



02

Build queries first, then build the dashboard around them (starting from scratch)

Why create a dashboard this way?

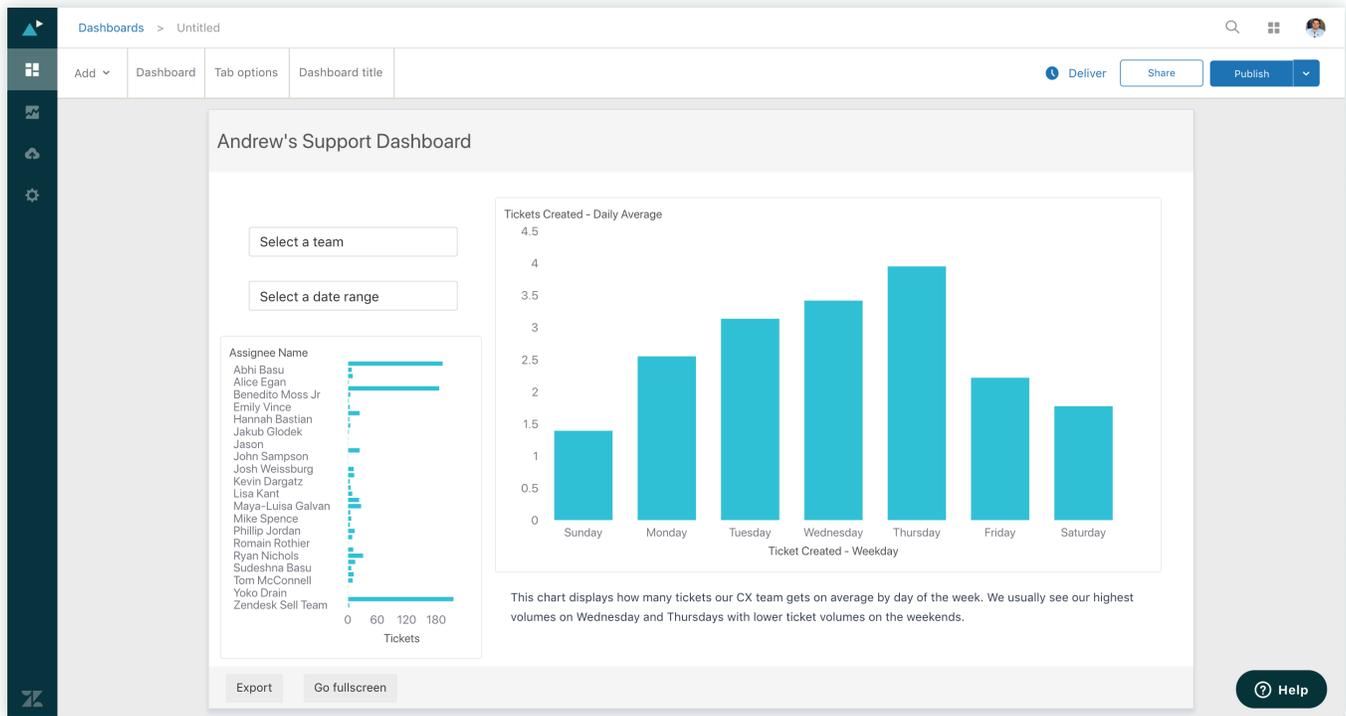
Queries are essentially asking questions of your data, so to build a dashboard built from your queries can be a way to design the dashboard directly to a workflow. This is an optimal approach for those who are well-versed in Explore and know exactly what they're looking to build or the answers they want to derive from their data.

Improved collaboration

A great benefit of having multiple Editors and Admins is that you can have various stakeholders collaborating on a single dashboard. These dashboards can be meant to accommodate data that's useful for multiple departments, or to provide an encompassing view of certain initiatives.

For example, individuals working in different regions can build out their own tab on a dashboard to provide insights that can be compared with other regions. Another example could be multiple support leaders who are focusing on different aspects of customer satisfaction—if each leader has Editor or Admin access, they'll be able to edit the dashboard and queries with new information that pertains to CSAT.





Widgets

Widgets in Explore are anything that you add to your dashboard. The dashboard builder appears on a grid—the widgets are a query, filter, text, or any other object that you'll interact with on the dashboard.

Choosing where widgets will be located and what they'll be is key to making a dashboard unique and understandable for those who view it.

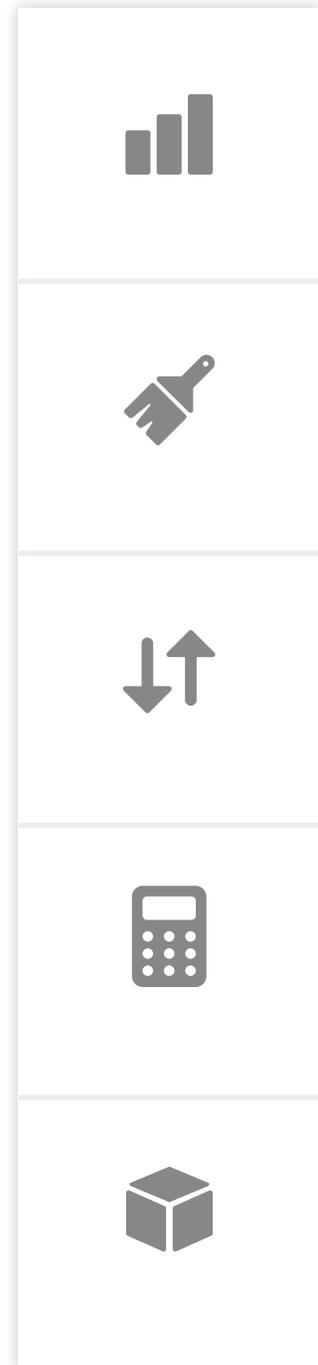
Widgets are separated into two categories:

1. **Static widgets:** These widgets can't be interacted with and don't affect query results or interaction on the dashboard. Static widgets include images, text, shapes, queries, and tabs.
2. **Interactive widgets:** These widgets enable users to modify their query results with more granular details. Interactive widgets include filters, adjustable metric and attribute fields, and an option for adjusting the date range.

Customization menus

After choosing where the widgets will be on your dashboard, you can use the customization menus for further modifications. There are five customization menus:

- **Dashboard menu** includes all of the overall dashboard formatting options, as well as dashboard actions you can perform
- **Tab options** is where you can edit interactions, widget, and export settings for each individual tab. You can also change the tab background color and font
- **Dashboard title** is where you can edit the dashboard title size, text color, and background color. You can also use the **Add image** option to add an image to your dashboard
- **Widget options** edit the header size, border color, border and header visibility, border edges, and widget positions. This menu will only appear when you select a widget
- **Widget header:** edit the header text color, size, formatting, position, and header fill color. This menu will only appear when you select a widget



Putting everything together: an omnichannel approach

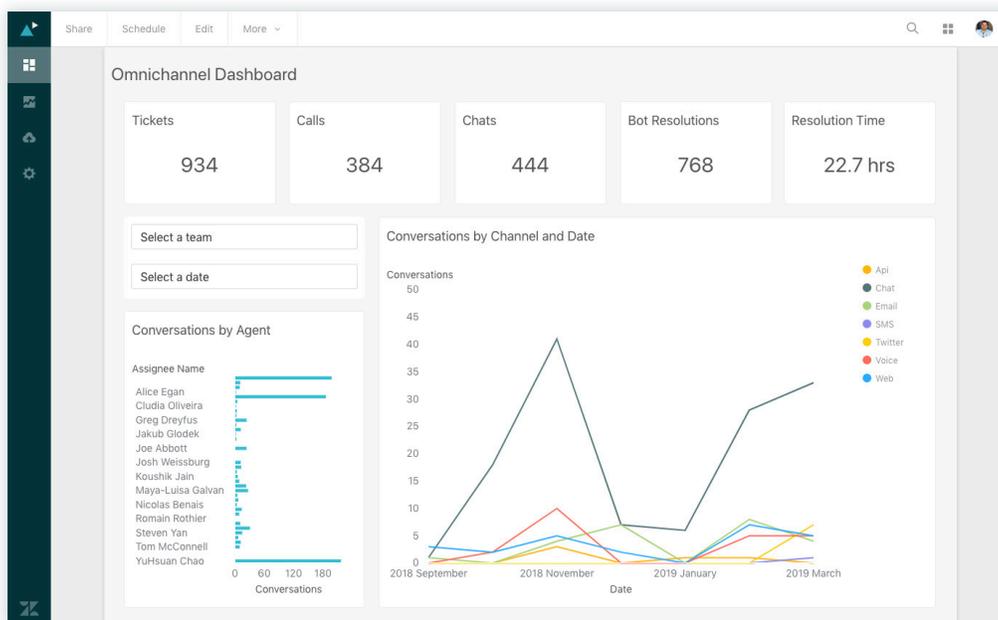
Omnichannel customer support provides multiple ways for customers to find the help they need, be it through support tickets, live chat, phone support, or self-service. If your business takes an omnichannel approach to its support, you may want to utilize two or more of the pre-built dashboards.

If you'd like to measure specific metrics from an omnichannel perspective, Explore makes it possible to measure data that spans across multiple channels. For example, you might want to understand which channels are driving the most customer satisfaction—you can create a dashboard that measures “CSAT by channel” for those direct insights.

Separate, omnichannel-focused dashboards are a convenient way to understand your omnichannel efforts. We'll cover how you can create a dashboard with customized metrics later on, but if your business does invest in omnichannel support, it's worth knowing which metrics you'd want to measure across channels.

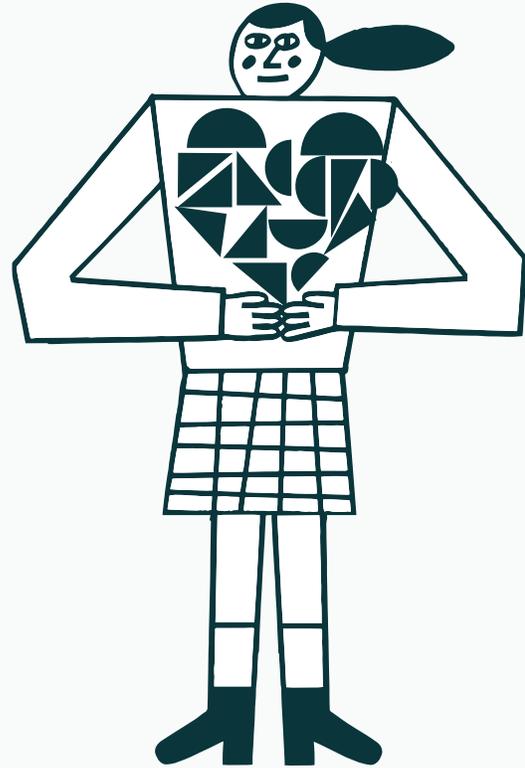
Here are a few that may be worth considering:

- **Conversations by channel and day of the week:** This can highlight customer demand for specific channels, which can influence how agents are staffed.
- **Channel evolution over time:** Seeing how channels are changing based on customer interactions can highlight which require more internal investment.
- **CSAT by channel:** Great for setting CSAT goals for specific channels and understanding the strengths in your omnichannel support.
- **Changes in wait times:** Measuring wait times by channels, with an emphasis on reducing customer wait times, can provide an indication that omnichannel support is working.
- **Ticket volume spikes:** Sudden spikes in ticket volumes can indicate which channels customers prefer during irregular events (like outages or big sales), which can influence staffing needs.



04

Sharing dashboards and exporting data



The customer experience data compiled in Explore will have great importance throughout your organization. As so, you'll need to know how to share it amongst those who would benefit from the insights.

Sharing

Dashboards can be shared with single users or groups of users that are added in Zendesk Support. The users who have been permitted to view the dashboard will receive an email invitation.

If it would be helpful for viewers to receive periodic updates about a dashboard, you can also set up an email delivery schedule.

Exporting

Since queries are essentially dynamic reports, the data can be exported for further analysis with another tool. Data from an individual query or over an entire dashboard can be exported.

You can choose to export in a CSV, image, or Excel format. When exporting queries, you can designate a specific size or ratio for the data to keep.

Best practices for sharing and collaborating

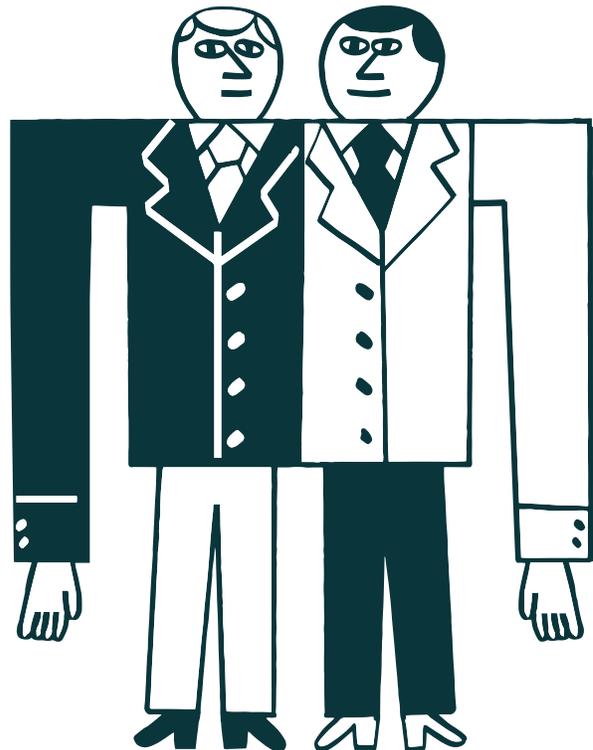
Your dashboards and queries should be optimized for the type of metrics that other stakeholders will want to see. Think carefully about who you'll be sharing dashboards with. The information you're providing them shouldn't be too much or too little.

For example, if you're sharing information with leadership, you'll probably want to create an executive dashboard that highlights important high-level numbers and trends. They likely won't need to know every single detail about every piece of data—they'll benefit more from a dashboard providing a synopsis of the data that's easily understood and shareable with other executives.

On the other hand, there will be many employees in your organization who will benefit from a lot of context on your data. That's when you'll want to take advantage of the multiple attribute options to provide

as full a picture as possible on your metrics. The more transparent that you can be with your data, the more that your organization will be able to derive important insights from it.

Additionally, think of how others will want to view data. If you, as the dashboard creator, want to provide options for how others will view the dashboard, you can include a "visualization selector" to give end-users the option to flip between different visualization types.



Conclusion

We hope this guide has given you what you need to kick off and optimize your analytics throughout your business. Explore is a deep product designed to scale with the needs of your customers and your organization—how you use it today may be different from tomorrow. Measuring the customer experience will be an ongoing endeavor, since perfecting it requires constant adjustments and improvement. But a great CX is what your customers deserve, and Zendesk will be here to help you every step of the way.

Learn more at:
www.zendesk.com/explore

For more help resources, visit the
[Explore Help Center](#)

