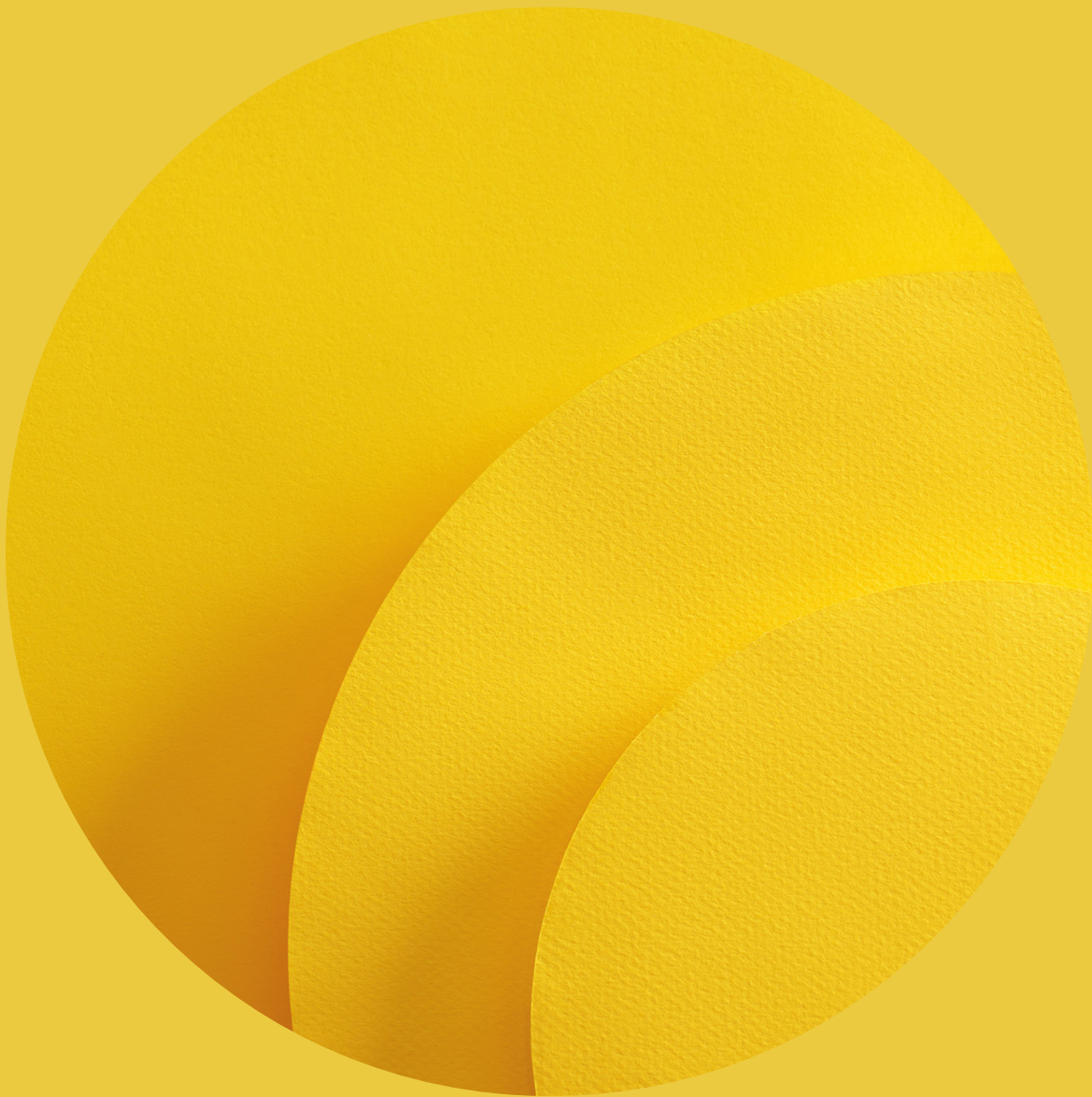


# Getting started with Sunshine

How to take control of your CX pain points



# Introduction

We're collecting more data now than ever before. Whether it's customer data, such as loyalty status, or business data, such as product inventory, it's crucial to manage every piece of information. Even though we have all of this data, most companies don't store it in one system – so it becomes siloed. And when your data is siloed, it's virtually impossible to activate it. And this can lead to bad customer experiences. That's why we created Sunshine.

Sunshine is an open and flexible CRM platform native to AWS that lets you connect and understand all your customer data seamlessly, wherever it lives. By integrating information under a single pane of glass, agents can see who your customers are and how they're interacting with your brand. And it empowers your agents to act on these insights and solve problems more efficiently.



# What makes up Sunshine?

There are four key components to Sunshine. Here's what they do and why:



## Unified profiles

let you connect customer-profile attributes so that you can see information such as loyalty membership status or recent spend in one place.



## Custom objects

allow you to store and see whatever data you want about the customer. This could be their order history, members of their households or their licences.



## Custom events

allow you to connect customer interactions in real time from any system and surface the information for your agents. This can be any action that's important for you to track, such as shopping-basket activity or a return being initiated.



## Sunshine Conversations

lets you unify messages from every channel into a single conversation and build interactive messaging experiences anywhere. Go beyond support with AI, bots and integrated apps for conversational business at scale.



# Three common CX pain points that Sunshine can help you solve

Take a look at how you could put Sunshine's features into practice in the real world.



## 1. A fractured view of your customer means that they don't get the support they need.

We know the realities of modern support. Agents have to toggle backwards and forwards between applications and spreadsheets, and it's stressful, repetitive and time consuming. They're missing key business insights that are crucial to solving your customer's problem. It's an expensive problem too, not only because agents take longer per ticket, but because they are often on multiple systems with expensive per-seat licensing.

### How Sunshine can help:

Sunshine brings together your customer data so that your agents can turn insights into action without ever leaving the customer conversation. And because Sunshine is open and developer friendly, you can build or install apps to make repetitive processes a one-click experience that flows naturally into how your agents already work.

By bringing together customer data and delivering it in the agent's workspace, we're making it easier for your agents to focus on customer experience. Take, for

example, one of our customers – a well-known watch retailer with three global brands – that has a strong in-store and e-commerce presence. With the brands scattered across different ERP systems, agents struggled to retrieve customer warranty information and purchase data. They had to toggle between multiple systems and cross-reference data, which slowed down ticket resolution. The company created a sidebar app using Sunshine Custom Objects, instantly providing all product and warranty information whenever an agent accessed a ticket.

# 1 in 5

businesses has lost a customer due to incomplete or inaccurate data

[Source](#)



## 2. Your customer experience is 'one size fits all', but your customers aren't.

There have never been more ways for customers to interact with your brand, and every interaction is a new opportunity to provide a tailored experience. But too often, the customer experience is complex, making them have to do the work to interact with you. Customers shouldn't have to provide model numbers, loyalty numbers, order numbers, serial numbers or warranty information just to get some help. With multiple channels to manage and mountains of data to organise, it can be hard to know where to start.

### How Sunshine can help:

Sunshine doesn't just store the data for viewing inside a CRM system. It's a platform that can power other applications. Integrating the same complete customer view into websites, e-commerce sites, marketing touches and mobile apps, Sunshine can help your agents provide the one-to-one service that your customers demand. Take for example, our Fortune 500 customer in the technology retail industry. While managing more than 780 SKUs, they struggled with huge data-storage fees with fragmented customer experience across their

brands. Using Sunshine Custom Objects, the company integrated product and customer data from various systems and created thousands of relationships to better understand each and every customer worldwide. Now, when one of their customers logs in to the Help Centre, they don't need to find the model number of their keyboard or mouse, because they automatically see the right content for their registered products (such as support documents, warranties and delivery status) without having to lift a finger.

# 80%

of customers  
are more likely  
to purchase a  
product from a  
brand that provides  
a personalised  
experience

[Source](#)



### 3. Customer experiences are reactive instead of proactive

When things don't go as planned, your customers may let you know about it. One issue has become two: fixing the problem and trying to turn an unhappy customer into a happy one.

Meanwhile, your customers are creating and sharing more data with you than ever before. [2.5 quintillion bytes of data are created every day](#). To put that number in perspective, it would take about 210,000 years for a quintillion gallons of water to go over Niagara Falls. So, it's a lot of data. We should be using it to act on problems before the customer even realises that they exist. However, most businesses cannot act on all of their customer information.

#### How Sunshine can help:

Sunshine helps get these insights into the hands of your agents or automated systems so that they can deliver proactive support. With real-time customer data, agents can anticipate requirements, resolve problems faster and defer to a lower service channel cost. Waiting for a call to come in from an angry customer is expensive, but sending a proactive email outlining how to resolve their problem is not.

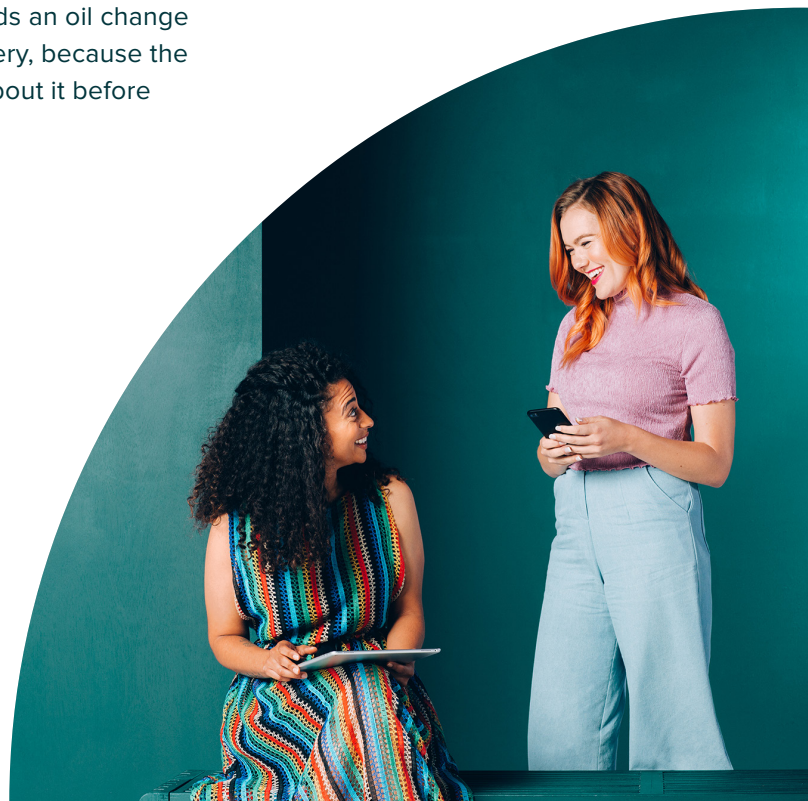
For one of our customers, a car-sharing service with over 700,000 members operating in the United States and Europe,

using data to head off problems meant happier and safer customers. They needed to monitor vehicle vitals and address mechanical issues proactively before their customers got in the car. Using Sunshine, they were able to monitor and take action on their fleet of over 10,000 vehicles. Now, if an issue pops up, support tickets are automatically created to alert fleet coordinators about maintenance or repairs. Their customers never rent a car that needs an oil change or has a dead battery, because the company knows about it before they do.

**97%**

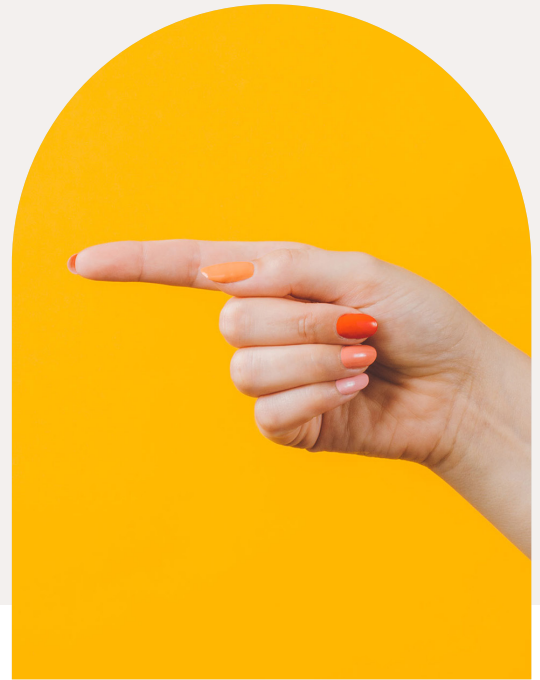
of businesses  
cannot act on all  
of their customer  
information.

[Source](#)



# How to get started

Sunshine was designed to be open and customised to your business, meaning that you can do almost anything with it. However, knowing which problems you want to solve will help you narrow down a solution. Start by asking the following questions to determine which features are essential to your team's success.



## 1. Define your challenges

### Which areas could be improved?

We know that CX teams are being asked to do more with less, and part of that is empowering agents to be more productive. Talk to your agents and see where they're being stalled or why they're feeling frustrated. Here are some questions to ask to get to the pain points:

- Is there data that isn't readily accessible to your agents that could improve customer experience?
- Are your agents hopping between different applications, such as your CRM or order-management-system, to retrieve customer data?
- Are there repetitive tasks that take up a lot of your agents' time? Could they be automated?
- Pay attention to the ticket types that take longer to solve than others. Which data could you integrate to shorten solution time?
- Is CSAT dipping? If so, why do your agents think it's happening?
- How is your agents' morale and job satisfaction?
- Do you have to make a case for software licences every year so that your agents can do their job?

### What's the experience like as a customer?

Test out the customer experience by actually becoming a customer, and ask a friend to do the same. Order a product online or try to book a service. Be honest. Where along the way might customers be getting frustrated? Here are some things to consider:

- When you want to resolve a problem on your own, is it easy to find the information that you need in a resource library or search tool?
- When you engage with a chatbot, what kind of information does it have? Does it feel like a personalised experience?
- When you call customer service, does the agent know who you are when they answer the call? If you're transferred, do you have to repeat your story to the next agent?
- When reviewing your order, do you have to keep typing in your order number or other details?
- Is all your information in one place or do you have to go back through emails for order history and warranties?

## Reimagining the role of CX

Your agents are on the front line of communication with your customers. Nobody talks to them more on a day-to-day basis, and each interaction is an opportunity to do more than just solve problems. Take a closer look to see whether your CX could become a chance to bring in revenue:

- Do your agents have the opportunity to go above and beyond to provide white-glove service with their current setup?
- Can your agents check product inventory for other shops in the surrounding area?
- Do your agents have the ability to order products or provide exchange recommendations without leaving Support?
- Can agents provide one-click upselling opportunities for the customer?
- Are there opportunities for agents to turn a service experience into a sales experience?

## What's the experience like for an agent dealing with an upset customer?

Look at your agents' current workflow to find areas where data could help them be proactive:

- Are you able to access real-time data on your customers' devices?
- Can you identify problems with an order or service before your customer does?
- How much efficiency does an agent lose by spending time on an hour-long phone call?
- What's more cost effective for your company: agents taking phone calls, or sending proactive emails, text messages and other low-cost touch-points?

## What this looks like

One of our customers is a premium men's clothing brand that promises 'the perfect fit for everybody'. They started out as an e-commerce-only company and have since expanded to 715 retail locations across the United States and Canada. Taking a service-led approach, the company wanted to help their agents personalise product suggestions and ultimately boost sales. By integrating marketing CRM data into Sunshine via Custom events and Unified profiles, their agents gained a full view of their customers. The company also built a custom app that allowed agents to make product recommendations. Now when a customer has a question, agents make personalised product recommendations with one click, transforming service into a satisfaction-boosting profit centre.



## 2. Define your goals

Now that you've identified your challenging areas, define the goals for using Sunshine.

### Do you want to:

- Improve your agents' experience by giving them the data they need at the right time?
- Know about product problems so that you can solve them proactively?
- Have data readily available to your agents for quicker ticket turnaround?
- Enable agents to make product recommendations and make sales?

Once you've identified the goals, work out what your primary goal is – are you taking on a big project or do you want to move quickly to produce a minimal viable product (MVP) and see how it progresses from there? Are you trying to solve a big systemic problem that could have significant impact, but would take longer to implement? Or, do you want to achieve small wins more quickly to build confidence? Whatever you decide, taking the time to make sure that your goal is specific and measurable will save you time in the long run.



### 3. Identify the root causes

At this point, you know what you want to achieve to improve your customers' or agents' experience. Before you take the leap, work out what's at the heart of the problem that's holding you back. Often, bad customer experience is a result of complicated factors that people believe are out of their control, but the root causes could be simpler.

**Here are some ideas to get you thinking:**

- What kind of information are your agents toggling between platforms to find?
- Do you have various systems storing data about the same customer? Does this ever cause problems?
- Are your processes built around your customer or around your systems' mandatory fields and rules?
- Are your sales, service and marketing teams able to collaborate and share knowledge?
- Are there reports that you can't run but would like to?



## 4. Find your Sunshine resources

You know what your team is struggling with, you know why they're struggling and you know what your goals are. Now it's time to find a developer who can help you make it happen.

Here are three ways of getting started:



### Internal developer resource

You might be lucky enough to have a dedicated developer who is able to help. If so, give your developer a high five, they're about to make you a rock star! We've put together a list of helpful resources for them:

- [Zendesk for developers](#)
- [Getting started with Sunshine for developers](#)
- [Sunshine Conversations developer guide](#)
- [Sign up for a Zendesk developer account](#)



### Zendesk professional services

If you don't have a developer on staff, our professional services team would love to help you build this project. We have custom packages that you can purchase based on your specific requirements. Contact your account rep to get started.



### External developer partner

We also have a lot of partners who can bring value with their vertical expertise, unique solutions and strong partnerships. Take a look at the [Zendesk partner directory](#) to find community-reviewed partners with whom you can work.



## 5. Go over the project with your Sunshine resource

Whether you'll be handling this project internally, with Zendesk or with an outside partner, it's important to go over the project properly to make sure that everyone is on the same page. This part can get a bit technical, so you might discuss these steps directly with your technical resource:



### Briefing

Start by briefing them on exactly what you're hoping to solve – it's more important that they understand your challenges and goals than it is to talk about the technology at this point.



### Identify data sources

Next, identify the various data sources (on-premises data stores such as Oracle DB, MySQL, cloud datastores like Snowflake or Redshift, or other customer-engagement applications, such as Salesforce or Shopify) that you want to integrate with Sunshine



### Work with your developer and IT

Work with your developer and centralised IT department to understand how to access APIs for these data sources. This could include generating an API token or provisioning a database user to query the source system.



### Create a project plan

Finally, create a project plan integrating the following steps:

- Generate connections between source databases and target Sunshine APIs
- Extract (and optionally filter or transform) data from the source system to normalise into your Sunshine schema
- Create a script or job to sync data programmatically between your source system and Sunshine
- Work with your developer and agents to iterate on a design for a custom Zendesk Support application that will optimise support workflows.
- Build and test the application using the Zendesk app framework and Zendesk app tools.
- Deploy your application to your Zendesk Support workspace and install it in Admin settings.





## 6. Start building

This is what your developer needs to know to get started with Sunshine:

### Like the rest of Zendesk's products, Sunshine is native to AWS.

- Sunshine has a set of [REST APIs](#) that you can use to push and pull data from Sunshine.

### Sunshine is based on open standards and supports the use of tooling and programming languages of your choice.

- Experience in working with REST APIs is helpful, as is experience in working with event-based architecture.
- Experience with building and deploying server-side web applications may be helpful as well, depending on your particular use case.

### Many Sunshine applications leverage:

- An integration platform (iPaaS), such as Workato or Tray.io.
- [Zendesk application framework](#) (ZAF): ZAF lets you extend Zendesk beyond its 'out of the box' functionality. Experience in developing with standard client-side web technology (HTML/CSS/JavaScript) provides a good starting point for working with ZAF.
- Applications that leverage client-side technology only can be hosted by Zendesk. ZAF also supports server-side applications built using your technology of choice.

The number of developer resources required will depend largely on the specifics of your project. Many Sunshine customers have gone live leveraging only a single developer resource.



# Ready to give Sunshine a try?

We hope that you've found this useful and are inspired to tackle even your hairiest CX challenges. But you're not in this alone. We've got more resources – from customer webinars to ideas guides and architecture guides – all on [zendesk.co.uk/platform](https://zendesk.co.uk/platform). You can also contact your account team and the Zendesk community for help.

Get a free trial of Sunshine Lite and [learn more about Sunshine](#)