The how-to guide to omnichannel support

zendesk

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Executive summary

Even if companies understand that an omnichannel approach performs better in terms of operational metrics and meeting customer expectations, there's still the question of how to do it.

How should companies go about adopting an omnichannel support solution?

With data from the **Zendesk Benchmark**, our index of product usage data from 45,000 Zendesk customers, we put together findings on best practices when it comes to launching new channels, integrating existing channels, and teaming up with the right technology partners.

Next, we took a deep dive into how companies should set up their self-service, a channel that's quickly emerging as an essential pillar of omnichannel support. Self-service allows companies to deflect incoming tickets and provide quick and easy answers to customers, and companies that are proactive about improving their help centers see better results.

Key findings

01

Incorporate what you've learned from customers as you roll out live channels

Most companies move quickly to add channels, with both B2C and B2B companies generally launching about three channels in their first month. Companies should use what they learn about common customer questions and preferences to inform their rollout strategy across email, webform, self-service, and live channels.

02

With new channels, expect to hear from more customers and for customer requests to be resolved more quickly

Ticket volume tends to increase after a channel launches, since new channels are reaching customers that haven't previously contacted support, and email sees the biggest drop in ticket share as new channels go live. Adding channels also tends to improve overall efficiency by reducing the time it takes for a ticket to be resolved once an agent responds to it.

03

Teaming up with the right technology partners means better support

Compared to companies that don't use integrations, companies that do see a 10 percent improvement in the time it takes for a ticket to be resolved once an agent responds to it. We recommend adding a standard suite of apps related to workforce management, agent training, customer surveys, and more.

04

Take an agile approach to self-service for the best results

Given the importance of great self-service, being proactive when building out your help center is a must. Companies that continue to add to their help center content over time see their self-service perform best at deflecting tickets and answering customers' questions.

05

B2C companies should move fastest to add channels

Moving quickly to roll out new channels is particularly important for B2C companies, which see higher ticket volumes than B2B companies or internal use cases. B2C companies roll out five channels nearly a month faster than other types of companies.
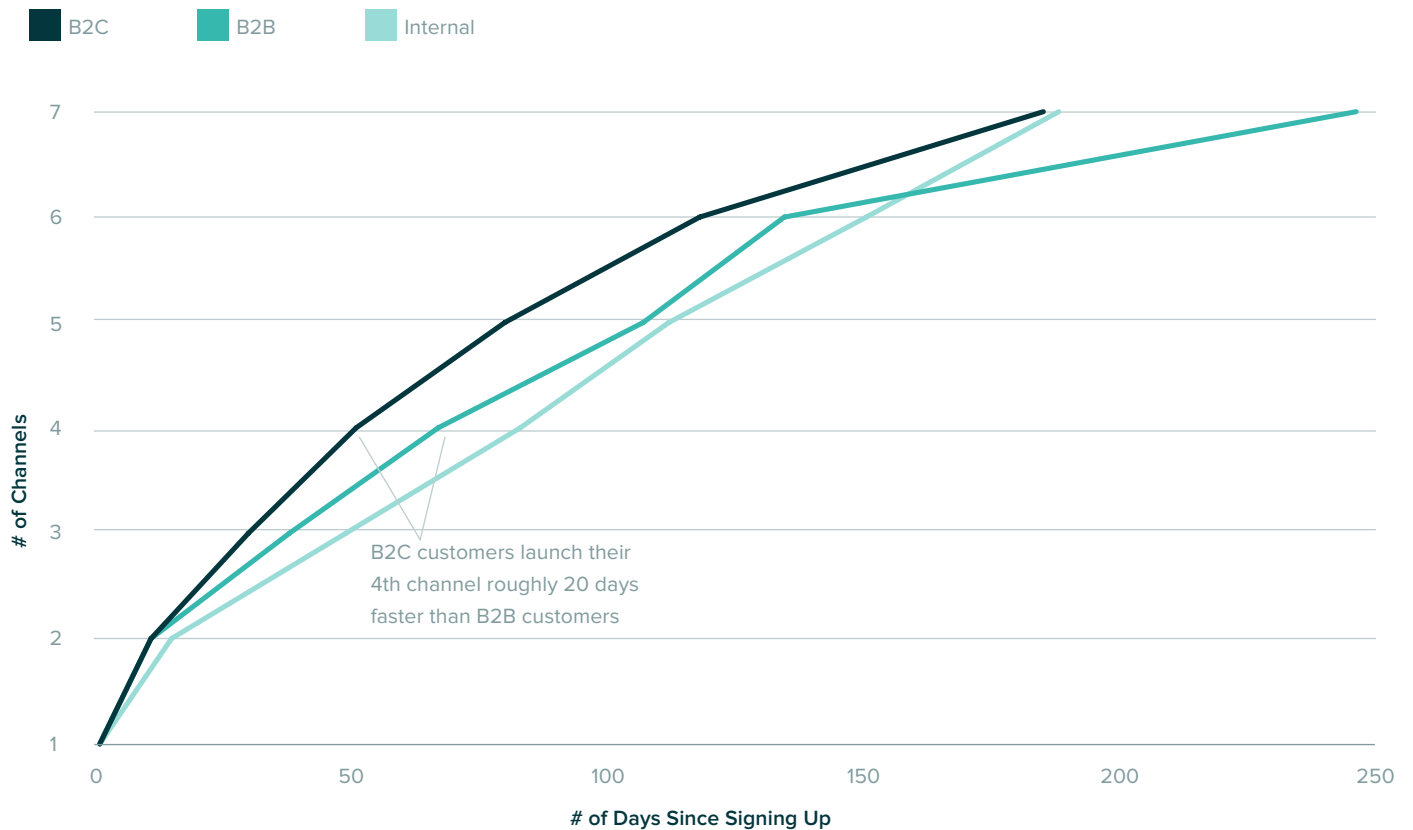
06

Integrate channels to align with the customer journey

It's crucial to make sure your channels are integrated to provide the best experience for customers. Map out how channels can work together across common touchpoints and where business rules and routing can simplify your support team's operations.

How to plan your channel rollout strategy

Companies may be interested in adding new channels but afraid of creating a firehose of inbound tickets when a new one is turned on. How can they roll channels out without getting overwhelmed?

We looked at how companies orchestrated their channel rollout across target audiences, industries, and company sizes to understand which factors organizations should take into account when going omnichannel.

B2C   **B2B**   **Internal**

B2C customers launch their 4th channel roughly 20 days faster than B2B customers

# of Channels

# of Days Since Signing Up

Use what you learn from customers to inform your live channel approach

Across companies, there tends to be a shared approach to rolling out channels: Launch first with asynchronous channels, email and webform, then roll out self-service. Within their first month of using Zendesk, most companies in our sample then look to leverage live channels to further improve on how they engage with customers.

Email and webform work best as a company's very first channels because they don't require interaction in real time, which gives support teams the room to work through any operational challenges and iterate on their staffing model before launching live channels. It also allows them to gather information on the most common requests, which they can use to populate the self-service content in their help centers.

After email, webform, and self-service, the next step for most companies is to turn on or integrate live channels. This is where the right rollout strategy may vary depending on a company's target audience. B2C companies and support desks for internal use tend to add Facebook then chat as the next two channels, while B2B companies add chat, followed by phone support then Facebook.

Most companies move quickly to round out their channel offerings—both B2C and B2B companies generally roll out three channels in a little over a month. It takes B2C and B2B companies about a month to get to their first live channel, and most have added another live channel before the two-month mark.

B2C companies move fastest to add new channels. In fact, they get to five channels almost a month faster than both B2B companies and internal use cases and tend to have a greater variety of channels. This likely stems from the fact that, on average, B2C companies typically serve three times as many customers as B2B companies or support desks for internal use.

Live channel benchmarks

Calls and chats should follow certain benchmarks depending on a company's target audience. When staffing channels, be sure to add in time as a buffer for agents to provide follow-up and documentation. Companies can also explore gating how many customers they offer live channels to at the time of launch, allowing them to work out any issues before offering real-time support to all customers.

	B2C	B2B	Internal
Average phone support call duration	2.9 minutes	4.2 minutes	2.8 minutes
Average number of daily chats*	72	26	25
Agent messages per chat	4.8	5.2	4.5

*Minimum 10 tickets solved per day

% Change in Ticket Volume

Channnel added
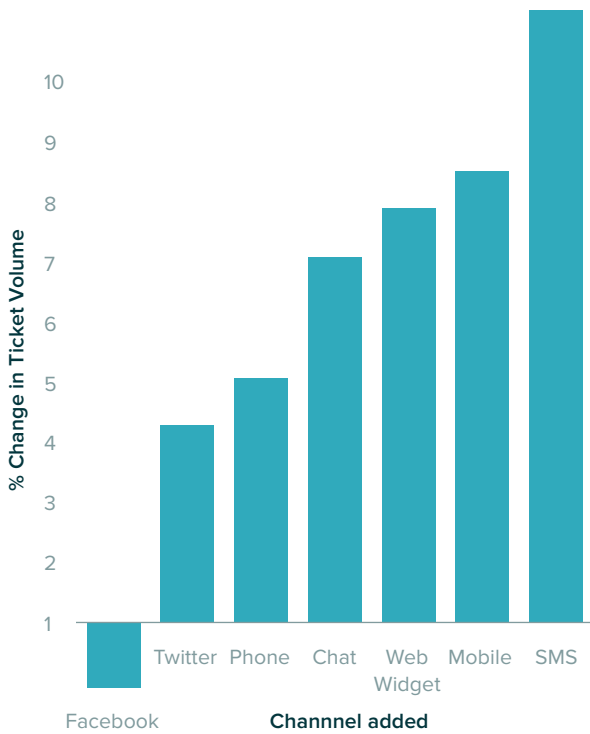
## Adding new channels means hearing from more customers, and improved efficiency

When adding new channels, companies should expect to hear from more customers and to see a decrease in the overall time customers spend waiting for their requests to be resolved.

When we look at support teams' metrics 60 days before and after adding a channel, we see that ticket volume tends to spike after a channel launches, and most of that increase in volume can be attributed to new channels reaching customers that haven't previously contacted support.

SMS, mobile embeddables, and web widgets—all channels that tend to make creating a ticket simpler for customers—generate the highest overall bump in ticket volume, implying that these channels result in the most growth in customers reaching out to support for the first time.

Twitter and Facebook cause the least meaningful change in ticket volume, which indicates that social media doesn't typically cause an influx of new customers contacting support. Across the board, email shows the highest drop in ticket share as new channels are introduced.

Adding channels also reduces overall requester wait time, the time it takes for a ticket to be resolved once an agent responds. For Zendesk Benchmark companies, Twitter, SMS, and chat generate the biggest improvement in requester wait time for customers, causing it to decrease by about 22 percent for Twitter and roughly 16 percent for both SMS and chat.

Channnel added

% change in requester wait time
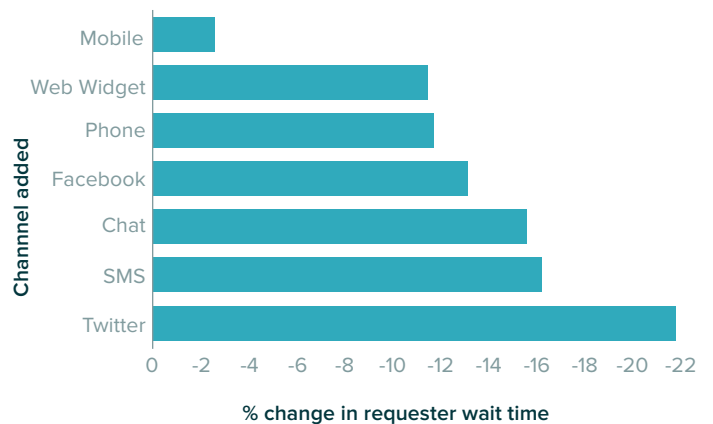
How to integrate channels and staff for omnichannel: Tips from Zendesk's Solutions team

As companies move to add channels—from asynchronous channels to self-service, to live channels and even AI—it's crucial that they remain focused on operational efficiency and ensuring channels work together for customers.

While a seamless omnichannel customer experience is now table stakes for companies, many are lagging behind in adopting this approach. According to Dimension Data, nearly 70 percent of organizations currently have none or very few channels connected, though 80 percent aim to have all or most channels connected within two years.

Tom McConnell on the Zendesk Solutions team has helped more than 700 companies, including Dollar Shave Club and Deckers, structure their support teams. He shared his tips on integrating channels and improving a support team's operations.

Understand your CX from the perspective of the customer.

You should align goals and metrics around the customer experience. A unified view of customer data is essential, since you need a single system of record for all customer, company, and behavioral data. Software solutions like Zendesk are a great way to do this.

Eradicate silos.

The more manual your triage function, the more silos exist and the less efficient your support operation. Silos are bad because they add operating debt, don't align to holistic customer experiences, and do not scale well. The best solution is to fully connect customer support channels, meaning there's one record of the customer and no divisions when it comes to tickets.

Balance live and non-live channels.

Companies should think about how to properly balance a team across multiple channels. Chats and phone calls from customers often fluctuate in volume throughout the day, so being able to to staff appropriately and allow agents to work on emails and webforms in off hours or between calls can keep productivity high as you adopt more channels.

Find where failed searches create tickets.

By leveraging analytics to identify self-service searches that turn into tickets, you can improve your self-service and answer customer questions more effectively. Helping customers find what they're looking for on their own frees up agents to focus on inquiries that truly require attention.

Be strategic about how you offer phone support.

Instead of making phone support available to every customer all the time and potentially causing customers to wait through long hold times, try using a request call model that empowers agents to escalate tickets to calls from any channel. And if, for example, a ticket has two touches, you might set up a trigger to automatically ask a customer if they want to have a call to resolve their issue.

Identify web pages that are a good fit for chat.

Hint: Sales, onboarding, and error pages work well. Many businesses put chat on pre-sales pages in addition to post-sales pages. We've recently seen more companies find success by putting a proactive chat on a failure page, like if a transaction fails or a 404 is generated.

Use SMS for proactive notifications.

Send a proactive notification via SMS when a customer receives a delivery or if there's something that requires immediate attention.

Match up issue types, time to resolution, and agent skills.

By identifying the top issues customers write in about and the average resolution time for each, you can implement better routing rules. This allows you to get customers to the right agents sooner and correctly match particular requests to the channels best suited for them.

Hire adaptable, versatile agents and embrace multi-tasking.

According to Dimension Data, two-thirds of organizations have agents who are multi-skilled across contact channels and skill types. Our data also supports this: For Zendesk Benchmark companies, the average number of multitasking agents has tripled since January 2017. This points to a growing trend toward hiring adaptable agents that can evolve with your team and allow you to break down silos and resolve customer issues faster.

How to add the right technology partners

Technology apps and integrations enable support teams to collaborate effectively and provide a consistent customer experience across platforms and tools. Most Zendesk Benchmark companies rely on apps and integrations, with 60 percent of companies in our sample using at least one.

Apps and integrations help teams answer customer inquiries faster—companies that used at least one app saw a 10 percent improvement in median requester wait time for their customers relative to companies that didn't use apps.

As a first step, companies should look to integrate channels natively (for example, combining Zendesk Support, Guide, Chat, and Talk), then explore adding additional apps and integrations as needed.

We took a look at the top technology apps and integrations, both as an accepted standard for all companies and as companies look to further customize their technology stack based on needs related to their industry or target audience.

The standard tech stack: What all companies should look to integrate

Regardless of company size, industry, or target audience, these integrations are the typical out-of-the-box options most companies should consider integrating.

Dashboards	Geckoboard	Use dashboards to visualize multi-channel metrics and KPIs across email, webform, chat, and phone support.
Workforce management	Tymeshift	Coordinate across channels with time tracking, workforce management, and agent scheduling tools.
Customer communications	Facebook, Twitter, Instagram, WeChat, Telegram, Viber	Make it easier to talk to customers by allowing other messaging and social channels to flow through support.
Agent training	Lessonly	Provide training software to help agents learn their craft and practice omnichannel scenarios.
Quality assurance	Maestro QA	Make sure agents supply high-quality responses with a solution tuned for Zendesk Support and Chat.
Translation	Unbabel	Make content work for international audiences with translation and multi-language support.
Customer surveys	SurveyMonkey, Survey Pal	Track KPIs such as CSAT and NPS to gauge how your team is doing.

Gaming Companies

For gaming companies, it's imperative to keep users engaged. This means integrations that quickly resolve any customer issues without disrupting the gaming experience, including embeddable apps that seamlessly integrate into a mobile app or web page, are particularly important.

App reviews	AppFollow, Google Play Reviews, ReviewBot	Monitor and respond to app reviews with these integrations.
Messaging	Discord	Communicate with gamers and reply to their inquiries directly.

Retail and e-commerce companies

Retail and e-commerce companies should focus on integrating technology partners that allow them to boost customer satisfaction and loyalty by providing a seamless experience, meeting customers on their preferred channels, and delivering personalized service.

Company & product reviews	Trustpilot, Yext, Yotpo	Aggregate and display company and product reviews to incorporate social proof.
Channel communications	ChannelReply	Manage customer communications that come in via Amazon or eBay.
E-commerce platform	BigCommerce, Magento, Shopify	Give agents crucial context on customers by connecting your e-commerce platform and support software.
One-click phone support	SnapCall	Let customers call in directly from your site and give agents access to important customer information.
Instagram tickets	Instagram	Seamlessly convert Instagram comments into support tickets.

Marketplace companies

Since marketplace companies don't own the products or services exchanged via their platforms, it's critical that they focus on building trust and loyalty. These companies should consider integrations that allow them to provide a frictionless experience while scaling quickly.

Messaging	Slack	Map triggers to multiple channels, and take actions to resolve tickets in Slack that carry over to Zendesk.
Agent staffing	Directly	Allow product and company evangelists to answer questions, an easy way to scale up agent capacity.
Video	Vidyard, Wistia	Provide video as a tool for support, allowing agents to use it for complex cases.

SaaS companies

For SaaS companies, it's important to make sure cross-functional teams are aligned to solve customer issues. These companies should consider integrations that allow them to rapidly incorporate customer feedback into the product roadmap and leverage technology to promote agent collaboration and efficient communication with customers.

Messaging	Slack	Alert teams that a ticket has been assigned, post reports, and share news on product issues or outages.
Project management	JIRA, Trello	Attach tickets to project management tools to boost collaboration.
Screen-share support	CloudApp, ScreenMeet, TeamViewer, Zoom	Use video screen-sharing, co-browsing, and remote support to get customer inquiries solved faster.

How to set up your self-service: The data-driven path to building a great help center

Our research shows that self-service is among the first channels companies launch regardless of their size, target audience, or how their support team is structured.

And customers agree that self-service interactions can make or break the support experience.

76 percent prefer self-service to alternatives like email or phone support, and more than half of customers will abandon their online purchases if they can't find fast and easy answers to their questions.

So given the importance of offering a great self-service experience, which course should companies take to build out theirs, and what's the best way to understand how they compare?

Using the Zendesk Benchmark, we looked at a sample of 500 help centers to find out what set the best ones apart from the rest. Basing our analysis on key metrics linked to help center quality, we revealed best practices and explored how companies stack up across approaches, target audiences, and industries.

Defining three different help center approaches

When it comes to launching and maintaining a help center, companies often have to weigh competing priorities, including the need for a quick launch, the importance of covering a wide range of topics, and the desire to free up agents to respond directly to customers.

We performed a cluster analysis on our sample, which allowed us to identify three groups of customers with different approaches to developing their help centers:

01

Agile Improvers

These customers use a lean approach to build their help centers—they start by creating a few articles for common FAQs, then continuously expand and iterate on their content over time.

By launching with the most searched-for content, this group uses self-service to deflect tickets with minimal up-front investment. And by committing to continuous maintenance and regular content approval cycles, these companies steadily grow and improve their knowledge content.

02

Set and Forgetters

These customers rely on their existing knowledge assets when they create a new help center. They use a "set and forget" strategy, often importing a large amount of content into their help center right from the beginning but not doing much to update it after launch.

This means they're able to get off the ground quickly by pulling in older articles from previous help centers. This approach allows agents to focus more of their time on resolving customer inquiries after launch. However, the initial group of imported articles may not be comprehensive enough, and published content can quickly become stale if it isn't updated regularly.

03

Patient Planners

These companies create their complete help center out of view of their customers, authoring potentially hundreds of articles before finally publishing everything at once.

The delayed start could give companies the chance to curate the right articles and cover any unexpected topics that may come up prior to launch. But it also means losing out on deflection opportunities as knowledge content is being created, and the lack of ongoing attention can cause published articles to lose value over time.

It pays to be agile (and comprehensive)

Given our groups, which approach to self-service fares best, and which types of companies are leading the way?

Agile Improvers, with their steady commitment to help center maintenance, score best across key metrics, earning the highest Self-Service Ratio and highest percentage of help center searches that generate a result.

Agile Improvers outpaced the other two groups based on their Self-Service Ratio, which compares self-service content views to total ticket volume and is the primary metric we looked at to determine how well a help center deflects tickets and meets customer needs. The median Self-Service Ratio for Agile Improvers is 4.4, compared to 2.4 and 2.9 for Set and Forgetters and Patient Planners, respectively.

Agile Improvers have help centers that are better at surfacing relevant content. Only 29 percent of searches of Agile Improver help centers generate no result, while more than 40 percent of help center searches generate no result for the other two groups.

We also found that Agile Improvers' focus on distributing the knowledge creation process more broadly across their teams contributes to making their self-service more effective. Companies in this group average 5.4 authors contributing to help center content, compared to 2.4 authors for Set and Forgetters and 3.6 for Patient Planners.

We looked at what distinguishes Agile Improvers in our analysis based on target audience. We found that more than half of Agile Improvers are B2B, making companies whose customers are other businesses the biggest share of this high-performing group.

Regardless of which group they belonged to, B2B companies have higher Self-Service Ratios, averaging 4.1 compared to 2.9 for B2C and 2.2 for internal use cases. They also have the most comprehensive help centers, with the highest number of categories, sections, and articles. On average, they have 25 percent more articles than B2C companies and roughly double the articles of help centers for internal use cases.

Comprehensiveness was also linked to quality when we ranked help centers by industry. Help centers belonging to companies in the Web Hosting, Manufacturing, and Software industries scored best in terms of Self-Service Ratios and have a higher average number of articles, while companies in Energy, Travel, and Retail had the lowest Self-Service Ratios and were below-average in their article counts.
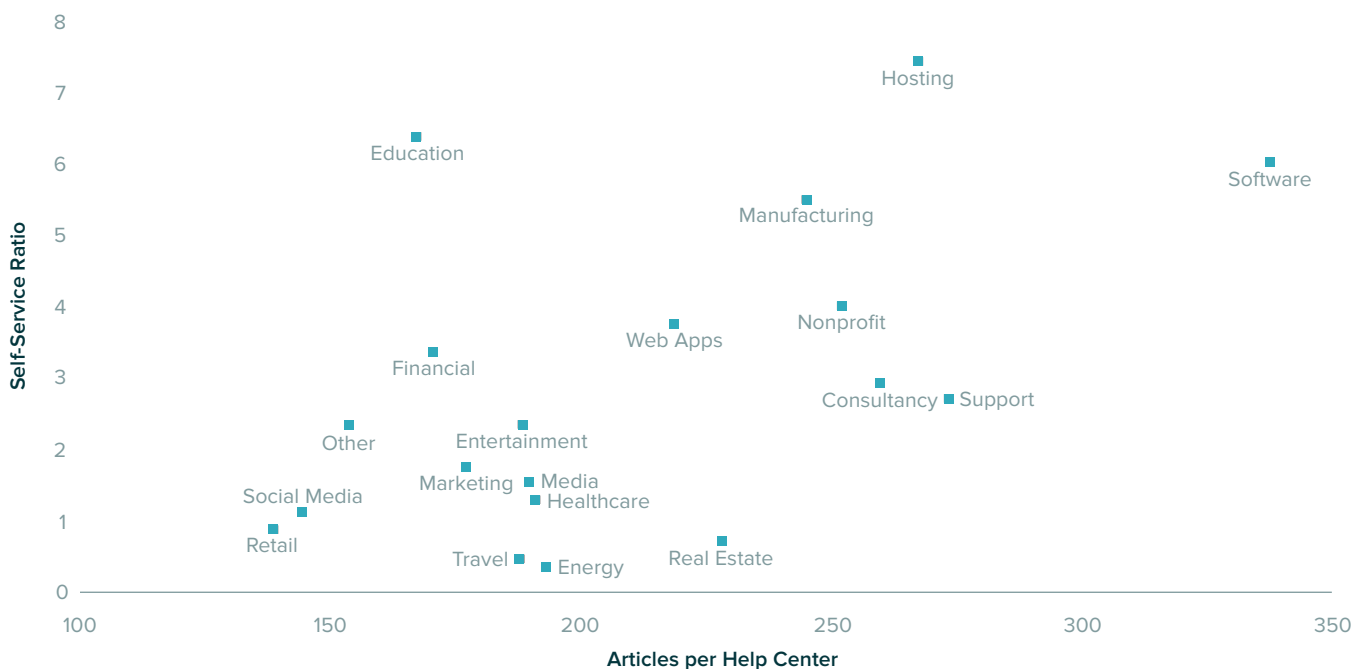
How to make your help center stand out

It's no secret that investing in self-service can dramatically improve a company's customer experience. In addition to helping customers directly, knowledge content also drives better results when customers do end up getting in touch. Tickets with links to knowledge articles perform better, with a 23 percent lower resolution time, 20 percent fewer re-opens, and a 2 percent better CSAT rating on average.

We found that companies with high-performing self-service offerings rely on a few shared tactics to ensure their knowledge content meets the needs of their customers.

When launching, start with the top five articles in your help center.

Zendesk Benchmark data shows that the top five articles account for roughly 40 percent of all daily views. To emulate our high-performing Agile Improvers, you should start with answering the most frequently-asked questions, publish those, and then work your way down to more niche answers.

Once you've covered the top five, focus on building out categories beginning with the most popular content in each, since the top three articles per category tend to make up 50 percent of the daily views in that category.

How can you decide what to cover first? The **About Field** in Zendesk is a great way to keep track of inbound tickets by category, allowing you to see which topics customers are most frequently writing in about as you're planning your help center content.

And with Zendesk's new AI-powered Content Cues feature in the Guide Enterprise plan, you can leverage machine learning to understand where there are gaps in your knowledge content and access suggestions on which articles you should create next based on incoming tickets.

Divide and conquer to expand your help center.

The best help centers are built from empowering agents to own ongoing content creation. Across companies, we found that it's a great starting point to identify which topics agents are subject-matter experts in and divide up content work based on their areas of expertise. Ideally, at least two people should review each article before publication.

Getting agents involved in contributing to content allows you to leverage their unique understanding of customer needs. Since they're already on the front lines of engaging with your customers, agents have the best institutional knowledge and can keep track of which information customers need, so they're easily able to identify gaps in your self-service content.

To take your knowledge creation up a notch, you can use **approval and publishing workflows** that let teams collaborate more effectively to author, review, and publish content. These workflows in Team Publishing, a feature of our Guide Enterprise plan, also allow managers to assign article updates to team members so it's easy to let them know where content work is needed.

Lean into agent collaboration and automation.

Riot Games is a company that's leading the way in agent collaboration to build out their help center, with an average of 5.6 agents touching each article. Their global support team of 500+ agents fields more than 3 million support tickets every year.

Thanks to a comprehensive help center that's constantly evolving via agent collaboration, Riot Games is able to leverage automation to serve up the right articles and answers for customers. The company uses custom-built apps and bots to reduce player wait time and deflect tickets that would otherwise require them to staff additional agents.

For companies looking for an easy plug-in to enable collaboration and automation, the Zendesk **Knowledge Capture app** is one way CX leaders power their knowledge creation. It allows agents to search the help center without leaving a ticket, to add links to relevant articles in ticket comments, and to write new articles while responding to tickets.

For more on taking an omnichannel approach, check out [The Zendesk Suite](#), which offers everything companies need to enable conversations with customers to flow across channels seamlessly, wrapped up in one simple package and an amazing price.

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