Want to Improve Your Zendesk Workflow?

Answer these three Questions

1 WHAT TICKETS ARE A PRIORITY FOR YOUR BUSINESS?

Just as each customer has their own unique needs, your business will have its own way of determining which Tickets are a priority. Having strong workflows with clear priorities will allow your Agents to respond to the most important inquires first. It will also route any Tickets requiring specialized skills to answer to the correct Agent, decreasing response time.

HERE ARE A FEW QUESTIONS TO ASK TO HELP DETERMINE TICKET PRIORITY:

- Do tickets come from a specific VIP customer?
- Were tickets submitted through a specific channel or email domain?
- Do tickets contain a specific keyword?

TRIGGERS & MACROS

Use Triggers to identify Tickets that meet your priority criteria, and Macros to affect a single action across all of those Tickets.

REAL WORLD EXAMPLE

As an Agent, you must set the priority to Urgent for all Tickets that have come in through a certain email domain. While you could do this manually, it would be more efficient for your workflow if you either:

1. Create a Macro that will set the priority and add a comment to the requester with one selection, or
2. Create a Trigger that sets all priority to Urgent whenever a Ticket comes in using that email domain.

2 HOW DO YOU WANT YOUR AGENTS TO FIND THE TICKETS?

Getting Tickets to the correct Agent or group of Agents will save you time. Triggers that auto-assign incoming Tickets to either specific Agents or groups of Agents can get Tickets into the right hands immediately. What does this mean? Your Agents can provide faster customer service. An auto-assign Trigger with a targeted view is a powerful tool in improving any workflow.

EXAMPLES OF HOW AN AUTO-ASSIGN TRIGGER COULD WORK:

- A Trigger that assigns all Tickets that come in with a specific email address and phone number to a certain group. Create unique email addresses to handle specific incoming requests.
- Set up different Zendesk email addresses and route requests to those addresses to a specific Agent. Auto-assign new Tickets to this specific Agent who is waiting to respond to those queries. Utilize forms to create specific requests that can be automatically assigned to Agents.
- Create different Ticket forms to handle the different types of requests you receive. Each form is assigned to a specific Agent or group.

www.729solutions.com/zendesk | graham@729.io | 415.418.9313

2 HOW DO YOU WANT YOUR AGENTS TO FIND THE TICKETS? *(continued)*

Depending on your company's workflow, your Agents don't need to see all the views created. Targeting views to groups of Agents keeps the clutter of views to a minimum.

TIPS FOR CREATING GOOD VIEWS:

- Adding tags to incoming Tickets to help create specific views with ease.
- Add columns to display the information you need to see.
- Create your own personal views, and help your agents design ones that work well for them.

3 WHAT SHOULD YOUR AGENTS DO WITH THEIR TICKETS?

Once an Agent takes a Ticket, it's important that they know how to handle it.

REAL WORLD EXAMPLE

You receive repeat requests for the same information and your Agent spends time typing a similar response each time. Solve this by creating a Macro or a Trigger that will send a pre-typed response to the requestor. Set your Agents up to be able to handle and solve a Ticket as quickly as they can. If you are an Agent or Admin and find yourself repeating the same task often, try to find a way to automate that task with a Macro or Trigger.

ASK YOURSELF THESE QUESTIONS TO SPEED UP RESPONSE TIMES:

- What Macros or Triggers can you add to limit an Agent from repeating the same task?
- Your Agents rely on having immediate access to complete information. Is your internal Knowledge Base up-to-date?
- Do your Agents have the training they need to not only do their work, but help identify areas where their workflows could be improved?

CONTACT: Graham Silbermann | 415.418.9313 | graham@729.io | www.729solutions.com/zendesk

* Pricing and packages may change. Consult your 729 Solutions Zendesk Partner or visit zendesk.com for up-to-date info.