

Zendesk Efficiency Checklist

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1 GET TO KNOW ZENDESK

Do you know what you paid for?

- ⬡ Zendesk currently offers [several different plans](#) (plus additional options to add on services for Talk, Chat Guide and more!) What plan did you purchase? Get to know the features and inclusions of your plan so you can make the most of your Zendesk instance.
- ⬡ Do you have Agents? Don't let unused agents sit idle - get them working for you. [Read more about agents.](#)

3 COMPLETE ZENDESK GUIDE SETUP

- ⬡ The Lite version of the Guide comes with every Zendesk support package.
- ⬡ Add helpful articles to your Knowledge Base so customers can self service answers on their own instead of waiting for an agent to respond.
- ⬡ Did you add on a [Community Forum](#)? If so, additional setup may be required so customers can post questions and browse issues that already have solutions.

5 INTEGRATE YOUR BRAND

Does your Zendesk Guide integrate seamlessly with your website?

- ⬡ Have you [customized](#) your brand colors and fonts?
- ⬡ Is your logo displaying correctly?
- ⬡ Did you add your favicon to your Zendesk Guide? ([What the heck is a favicon?](#))
- ⬡ Is the user experience from your website to Help Center [seamless and customized](#)?

2 FIND YOUR PAIN POINTS

- ⬡ What challenges are your agents facing?
- ⬡ What challenges are your end-users facing?
- ⬡ Reach out to your agents and customers to ask for their feedback. [Make it easy with a tool such as SurveyPal](#), Survey Monkey or Google Forms.

4 SEGMENT YOUR CONTENT

- ⬡ Segmentation allows you to build out a Knowledge Base, giving agents the tools they need to support customers effectively. [Read our Article about KB best practices](#) for ideas on what information include.
- ⬡ Integrate your Knowledge Base with Support using the [Knowledge Capture app](#) and make your agents even more efficient.

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