



## White Paper

# Supporting Customer Experience Initiatives Through Productivity and Process

Sponsored by: Zendesk

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## IDC OPINION

Today's highly competitive marketplace requires that organizations create compelling customer experiences that allow them to get closer to the customer and to reduce friction in the interaction life cycle for both customer satisfaction and efficiency. Customer experience (CX) strategies that not only include the direct customer-facing employees but incorporate traditional back-office processes aligned to the customer and business requirements are key to building a comprehensive and seamless experience.

Organizations need to understand and embrace the change in both business process and culture that is required for such strategies to work and understand that short-term benefits might need to be forgone to realize long-term differentiation. For such environments to be successful, mechanisms such as culture, process, employee development and support, and systems need to be in place and designed for rapid and agile response to changes in the marketplace – internal, customer, or competitor driven.

For most organizations, regardless of industry, a critical component of customer experience is the alignment of "employee experience" to the go-to-market strategy of CX. The development and nurturing of the organization's employees, both for personal growth and in the precepts of the organization's strategy, is a fundamental building block for the execution of the CX strategy. Customer service agents are a prime example of how through training, development, empowerment of the individual as an employee, and support of the agents with tools through which they perform their job, such as software systems, become productive, confident, and enabled employees who then serve as advocates for the organization.

Keys to delivering a superior customer experience enabled by process, people, and platform include:

- Leadership is essential in an organization if a customer experience culture is to take hold and prosper.
- Responsibility for customer experience initiatives is not confined to a single department but is a holistic organizational effort that requires participation from all customer-facing departments such as marketing, sales, service, and support, as well as back-office processes such as finance, inventory management, distribution, and logistics.
- Consistency across the customer-facing touchpoints is essential to providing a complete and consistent customer experience, but it is also the leading challenge. Organizations must orchestrate their channels with business process and support those processes with integrated systems.

- The employee is an essential component of any customer experience strategy and is involved in its own aligned "employee experience" strategy. Execution of an employee experience involving customer servicing personnel, such as customer service or contact center agents, is most successful when those employees feel successful, helping drive confidence and commitment.

## IN THIS WHITE PAPER

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This white paper discusses the imperative faced by organizations to create satisfying customer experiences. For employees who directly engage with the customer, such as customer service and contact center personnel, that imperative is felt every day and can only be answered by addressing the goals of the organization and supporting the key customer function areas with the proper tools and processes aligned with those overall organizational goals. Customer experience as a discipline may lead with the word "customer," but the road to effectively serving the customer is one with many additional drivers, including employees, partners, and suppliers. Attracting, developing, and retaining the appropriate employees through an "employee" experience work hand-in-hand with the customer experience.

Executives who read this white paper will learn what it means to be a customer experience-focused organization; the impact, benefits, and challenges to pursuing a customer experience strategy; and examples of organizations that have effectively utilized tools to support service and contact center agents in the pursuit of delivering a superior customer experience.

## SITUATION OVERVIEW

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### The Modern Customer Environment

#### *Individual Customer Interactions Versus Customer Experience*

The term *customer experience* has emerged in the market and has taken on a significant following among forward-thinking organizations. It is a strategy being adopted and funded, but why has CX emerged and grown so quickly now? Harry Selfridge and Marshall Field popularized the phrase "the customer is always right," which focused on a moment in time when the customer stood in a store interacting with a clerk. The adage has become a staple across industries. The evolution into customer experience brings a broader perspective to the organization-customer interaction. CX focuses on the relationship: the ongoing partnership between the organization and the customer. The interactions might not be directly involved in a purchase today but represent an "experience" between the brand and the customer. That moment may be the consumption of an advertisement, a moment in a store, the submission of a payment for a bill, a call to the contact center, or an involvement with a partner of the brand. All of these moments and how customers interpret those moments – whether they meet, exceed, or miss the customers' expectations – constitute the customers' experience and build both a relationship and an impression of that brand over time.

#### *Channel Proliferation*

Early retail was dependent upon in-person and mail-order experiences. In the modern environment, there has been a proliferation of channels of interaction and therefore experiences that need to be supported. For the average organization, the basic requirements for channel support today include in-store, Web site, Web store/ecommerce, email, telephone, Web/SMS chat, social, support forums, IoT

(connected devices), and embedded support (in-app, Web widget). The support of all these channels is challenging on several levels:

1. **Cross-channel.** A customer may start on any one of these channels and in the course of completing that one interaction move from one channel to another. How does an organization structure its channels to allow a customer to start on a Web site in an FAQ, move to a chat session, and then move to a phone call within the same interaction while maintaining the history, context, and accompanying data?
2. **Contextual.** There is a lot to know about customer, and if an organization wants to understand the relationship, it must bring all the known data together in a way that enhances the relationship. How does an organization aggregate data and provide context within each transaction?
3. **Personal.** Across the range of potential channels, many involve either no direct involvement of another human (IoT, ecommerce) or latent one-on-one connection (social, email). How does an organization bring the essence of a personal relationship to a digital interaction?

What happens if the expectations of the experience are not met? Broad communications of the unhappy experience can cause a loss of patronage if not responded to correctly. The scope of the communication and the rapidity of which the customer can find another provider is at a stratospheric scale versus the 1900s. Slow response Web sites can be a reason for defection and complaint. Missed orders at Christmas have had historic repercussions. Customers have loudly and clearly shown that they have a voice and they use it.

### **A Customer Contract**

Today's customers are no more or less demanding than customers of old. The main difference is the ease of loyalty switching and the ability to communicate broadly. Customers do have a right to demand quality in product and excellence in service. Even in a business-to-consumer (B2C) environment, a purchase carries with it a contract between the seller and the buyer. The customer is exchanging money for a product or a service. When that exchange happens, the customer is receiving, in addition to the raw product, the promise of a quality offering, a timely response for service if needed, and a professionally handled experience.

That is why the idea of the life of the interactions between the customer and the provider is so important and is not one moment in time. This affords the brand an opportunity to prove itself many times. This not only diminishes the weight of any one interaction but builds a flow of interaction history and a "relationship." Of course, this also provides a challenge to the organization; the brand must follow through, provide consistency and context across channel, and make good on the customer contract.

### **The Customer Experience – A Definition**

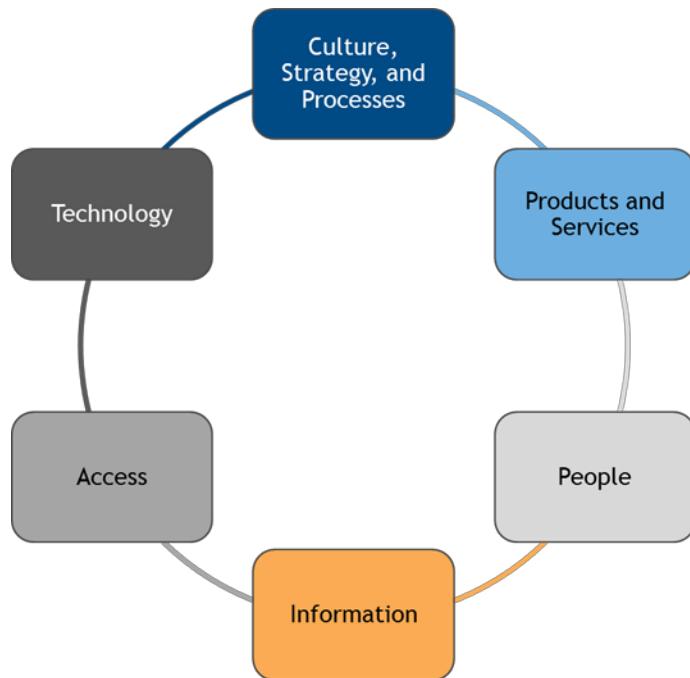
IDC sees the customer experience as a business strategy that is part and parcel of a broader business strategy. Customer experience is actually one of four experiences defined by IDC – those of customer, employee, partner, and supplier. While an organization may have the end result of a customer experience in mind, it may choose to pursue an employee experience or partner experience strategy as its means to ultimately deliver a differentiating customer experience. (See the Appendix for a full definition of all four experiences.) IDC defines customer experience as follows:

**Customer experience** is the entire process over the lifetime of a relationship between customers and an organization with which they engage. In this context, customer experiences can range from a single transaction to an ongoing relationship over a period of many years.

IDC has identified six components that are essential in building a complete CX strategy (see Figure 1).

**FIGURE 1**

### **IDC's Customer Experience Taxonomy**



Source: IDC, 2016

## **CUSTOMER EXPERIENCE IN THE REAL WORLD**

In 2015, IDC conducted the *EXPERIENCES Survey*, which focused on environments that had adopted go-to-market strategies of one or more of the four experiences. By studying organizations with established practices, IDC sought to understand the level of visibility within the organization that CX had, the individuals who were in charge of the strategy, the reporting structure, and the required authority level.

### **Customer Experience Is a Strategic Initiative**

To gain an understanding of the importance of a customer experience strategy to the organization, IDC asked, "Who or which group in your organization has a goal and is mainly responsible for driving a superior customer experience?" The responses to this question revealed that the intent is very clear: the leaders of the company are in the driver's seat for the majority of the sites. Slightly more than a quarter of the respondents, 26.1%, indicated that CX is a strategic goal led by the CEO, while 46.2% of the respondents indicated that CX is a strategic goal led by the senior executive(s). These two groups represent 72.3% of the survey population. The next largest group at 17.9% selected "operational goal, led by other managers." This segment likely represents newer, pilot initiatives or grassroots efforts. Only 8.5% of the respondents indicated that it was a marketing strategy led by the CMO.

This data clearly shows that customer experience initiatives are in play and are regarded as a strategic strategy for the organization. With leadership taking such a strong stand in setting the tone for the go-to-market strategy, a culture is communicated to the organization.

*Medidata Solutions is a cloud-based provider of software targeted at the clinical trials industry. Medidata has reorganized around the customer and is moving toward an effortless customer experience. In the past, because of having its tickets spread out over several systems, it was difficult to get a full view of a customer's experience with Medidata. For this, it selected Zendesk. With the added visibility of metrics and one platform, it is able to determine if a customer had a high- or low-effort experience.*

## **Powerhouse Factors in Driving Customer Experience – Consistency and People**

### ***Consistency***

Customer-handling channels are among the first to augment existing systems with the latest technologies in order to reach, respond to, and service customers. Early Web sites originally created to market and promote the brand and its products quickly required a mechanism for customers to be able to contact the organization. In the rush to embrace new technologies and to take advantage of digital opportunities, a morass of systems has been created. In addition, the underpinnings of some of these "new" systems are approaching 20 years old. A digital transformation is not only required but mandatory. However, it is only the first step.

In IDC's 2015 *EXPERIENCES Survey*, when respondents were asked what the top 3 important factors in achieving a superior customer experience were, "consistent experience across different channels of interactions" was the number 1 response virtually tied with "personnel that are motivated, capable, and friendly" (refer to Figure 2). A follow-up question identified the complexity of this realization. When asked what the top 3 communications channels today were for ensuring a superior and differentiated customer experience, the respondents cited 12 individual channels, with the newest digital channels of communities, Web forums, and text/SMS messages topping their list.

Unfortunately for these sites, the realization of what is needed and the ability to address the problem are two different things. When asked what the top 3 challenges for their organizations were to delivering a superior experience, "delivering a consistent customer experience across multiple communications channels" was the leading response. Investment plans targeted addressing this problem.

*Just Eat is an online and mobile takeaway food ordering service. Started in Denmark in 2001, it became listed on the London Stock Exchange in 2014. From humble beginnings in a Danish basement in 2001 to its 2014 listing on the London Stock Exchange, it now operates in 15 countries across Europe, South America, Australia, and New Zealand. From an agent perspective, Just Eat reports that the system is making its job more efficient, giving the company insight into customers, and it is hoped that as it gets used to having the tool and becomes more comfortable using the tool, it will be able to deliver better resolutions to the customers.*

*From a business perspective, the system has made its internal processes more efficient and brought a level of visibility and insight across its business. With over 500 people in the United Kingdom alone and 200 distributed throughout the world in other countries, it now can work off one system. Through data understanding, it can see what its resource requirements are against order volume, which is*

*enabling it to manage against KPIs. This in turn allows the company to set accurate SLAs with restaurants. Overall, it has experienced more generalized efficiencies that has allowed it to better manage resources.*

## **People**

As shown in Figure 2, the second most important factor in delivering a superior customer experience, tied with channel consistency, was that of "personnel that are motivated, capable, and friendly." In addition, the people factor can be seen in other responses including "account representatives or relationship managers with strong knowledge of me as a customer and my company's engagement" and "seamless collaboration experiences with other employees, customers, partners, and suppliers." These responses highlight the fundamental nature of the employee to customer experience.

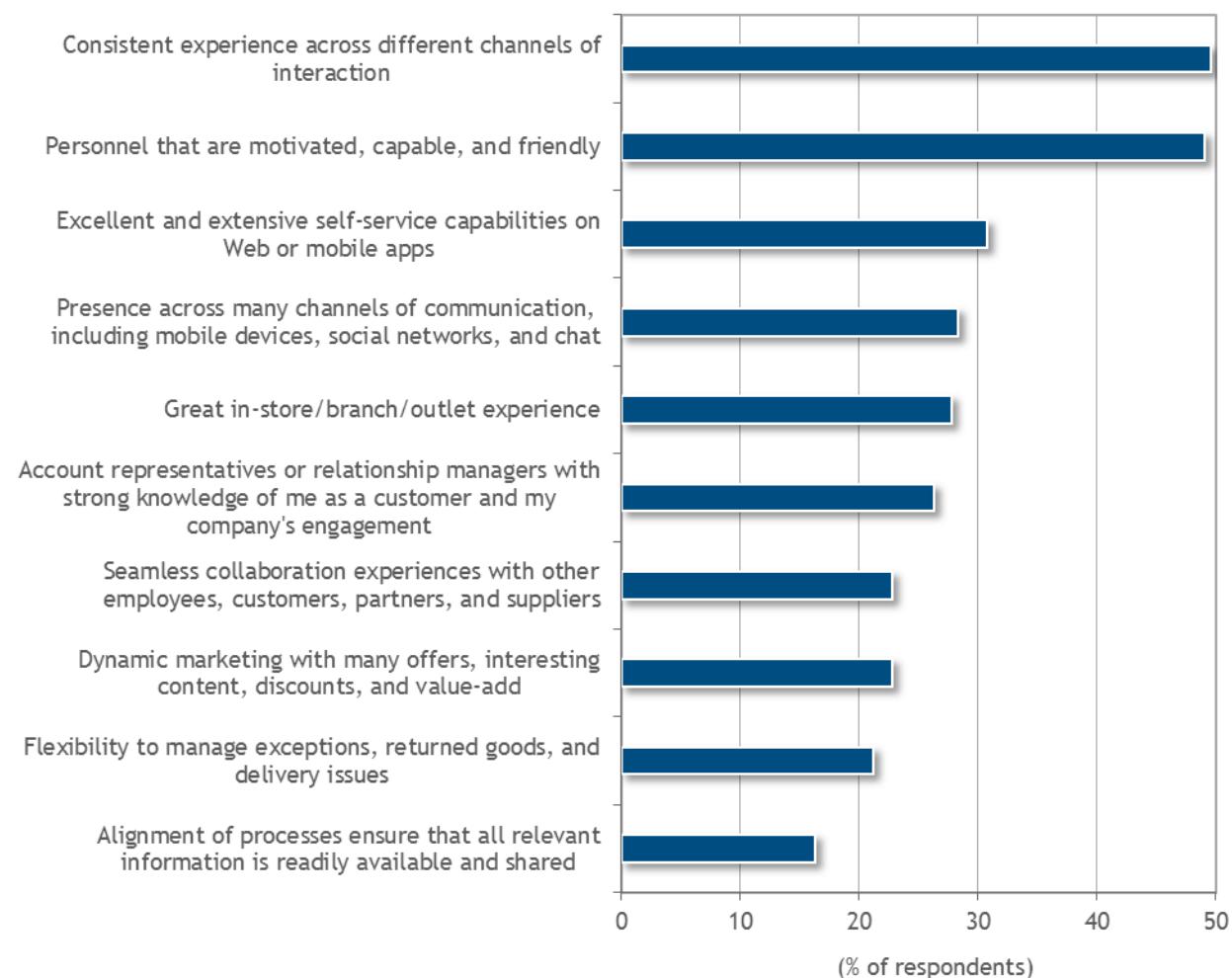
When asked what the top challenges were to delivering a superior experience, the people component again figured heavily. Among the responses were finding and keeping qualified customer representatives, hiring the right employees, training employees properly for the job, and rewarding and retaining the best employees. Future plans were also in place to address these issues, with a focus on hiring, training, and retaining employees.

*NatureBox is an online snack delivery service headquartered in Redwood City, California. According to Dawna Blocher, Director of Customer Support, NatureBox has experienced both internal processes benefits in terms of productivity, employee experience benefits, and customer experience benefits through its use of Zendesk. On the productivity side, the tool is easy to navigate for agents who can easily see their work and use macros, making it easy to complete their tasks. In addition, agents feel more confident in their customer handling. NatureBox has been careful to keep the number of chat sessions low per agent to ensure that the agent is not overloaded and that the customer experiences a near dedicated chat exchange. Since the first day of operations with Web chat, CSAT in chat has been running 5% higher than in email or phone.*

## FIGURE 2

### Important Factors to Achieve Superior Customer Experience

*Q. In your opinion, what are the three most important factors in achieving a superior customer experience?*



n = 419

Source: IDC's EXPERIENCES Survey, 2015

### The Agent Experience – An Employee Experience

It is not a surprise to anyone that the employees are direct extensions of the organization and that they figure heavily in customer experience. However, note the attributes attributed to the employee in the above response "personnel that are motivated, capable, and friendly" (refer back to Figure 2). Those are not words applied to anyone "just showing up to do the job." They point to an engaged employee. IDC designated a separate parallel experience of the "employee experience" for precisely this reason – not just to highlight that the employee is merely a conduit for delivering the customer experience but to highlight that they need to be on a parallel path of nurture and be supported in order to achieve their

own actualized experience. It is then that these employees are in a position to act as advocates for the organization. Motivated employees are not ones that are ignored by the organization in terms of their own development.

Consider the specific roles of contact center agents and customer service individuals. Individuals with these two job titles are those that are in direct contact with the customer. It is a well-documented phenomenon in most organizations that the organization experiences a high turnover with these individuals, which precipitates additional cost to the organization in terms of attracting, hiring, and training new personnel. This is in addition to the potential lost revenue while replacement and training are occurring. An organization that is pursuing a customer experience strategy with a parallel employee experience strategy would develop these employees in a manner that supports the organization's goals while at the same time developing the employees' own paths.

The agent experience is one that is key within the new realm of delivering differentiating customer experiences and is on track to become even more important. While organizations are supporting multichannel interactions and placing a heavy focus on moving interactions into self-service and lower-cost channels, an interesting consequence is occurring in the agent pool. The interactions are indeed going down, but the length of the interaction is increasing. This is due to the more complex interactions, the ones needing extra help, making their way to the contact center. These calls may be urgent because the customer has tried self-servicing without success. By the time the customer reaches the contact center, his/her emotional state and problem have escalated. According to IDC's survey of contact center managers, an increase in the agent population is expected in the next 12 months because of these factors.

In all, this points to a requirement to increase the focus on attracting and training higher-tier qualified contact center agents and supporting them with technology, enabling them to perform their job with increased efficiency. Retention is necessary to maintain knowledge and the investment that these agents represent.

*Medidata Solutions' use of Zendesk has a tangible impact on agents. For the company, the simplicity of how its workflow is configured through the new ticketing system allows it to perform its job easily. Account managers are able to track tickets via SLAs to see which tickets need immediate attention. Thanks to Insights, Zendesk's metrics platform, Medidata is able to track the success of its agents and tickets. Examples of key metrics Medidata keeps a close eye on via dashboards created within Insights are customer satisfaction, turnaround time for tickets, and organizational metrics such as which team did the request come through and which group handled the ticket's resolution. And thanks to the customer-facing Help Center, customers no longer have to call Professional Services or the Help Desk to check in on the status of their ticket. Help Center also provides customers with the empowerment to solve their own issues through the use of the knowledge management system within Help Center.*

## Challenges/Opportunities in Creating Compelling Customer Experiences

Shifting organizational focus to a customer experience strategy and executing successfully have many challenges but do present opportunities to the organization. The two leading challenges are as follows:

- **Corporate challenges.** Without a clear directive from the highest ranks of the organization, a customer experience strategy is doomed. While there are many examples of organizations that have begun a CX strategy from within one department and were able to spread it broadly, the likelihood of success is much lower and the long-term commitment doubtful. More often

than not, the initiative will die out because the group leading it does not have the required ability or authority to force change. The leaders or representatives of the initiative must have the authority, which comes from the support of corporate leaders. When corporate leaders are truly onboard, as were the participants in IDC's *EXPERIENCES Survey*, the culture is permeated with CX. Among the changes that only management can authorize are such things as mandating that siloed departments collaborate and change the distribution of responsibilities or reporting structures.

It also requires time and at times a recognition that short-term profits may need to be forgone in exchange for long-term gain. In findings published by the White House Office of Consumer Affairs, customer experience leaders outperformed the S&P 500 by 26 points over a seven year time frame (see "Understanding Customers" by Ruby Newell-Legner, Watermark Consulting). For organizations focused on the short term and that have yet to commit to a CX strategy, a data point such as this could be reason to rethink the viability of such a strategy for their organization. However, for those looking long term, it presents an opportunity to future-proof their organization.

- **Technical challenges.** Disconnected systems create data silos and do not allow for an integrated view of the customer. Pulling together a complete customer profile provides the opportunity to deliver individualized and contextualized customer experience. The current state of disconnected systems does not allow for easy distribution and sharing of customer data. In the situation of the contact center agent, these individuals often work with multiple screens to piece together the information they require. To service the customer in an individualized manner, a full profile of the customer with complete current and past interaction histories and preferences is needed, which not only allows a view into what is required at that moment but also gives the ability to project upcoming requirements. In addition to the existing legacy systems that hold customer data, there are the newer sources of customer data such as social networks and social media, making the problem more complex. Integrated data and integrated workflow are both critical to delivering good customer service as well as creating the backbone that enables the communication through the entire organization. This includes product planning, marketing, finance, sales, and other corporate departments, all of which play a role in fulfilling a customer experience.

*A successful Web-based real estate company has improved the efficiency and quality of its internal and customer support with Zendesk. The company effected these gains by moving from shared email accounts and a locally maintained ticketing system to Zendesk's cloud-based offering. As an organizing principle, Zendesk brought one platform to the company upon which multiple constituents can communicate. The company's Customer Service and IT Teams can route tickets to and converse with other support teams (engineering, marketing, etc.) about any issue on a common eplatform.*

*Through its reporting features, Zendesk has also provided the company's Customer Service and IT Teams with the metrics they need to understand the quality of support they offer to employees and customers, respectively. The company also plans to test a new, potentially scalable workflow wherein product managers handle all communication on escalated tickets. Engineers will still be able to leave private, internal notes in tickets, but they won't respond directly to ticket requesters as they used to."*

This does not mean one monolithic system. Most organizations have multiple systems that were selected for their specificity to functional requirements. In a comprehensive customer experience-supported technical environment, there will not be a platform but rather integrated systems that also offer flexibility and agility to support CX. Organizations must first focus on their goals to understand the requirements of their new processes and supporting applications infrastructure that supports those goals. Then they must think in terms of inevitable change. Does their new system allow them the agility

to incorporate system changes precipitated by business strategy changes? While careful planning is required to orchestrate such an environment, the long-term payoff through agility and flexibility can mean the difference in being customer responsive or not.

*As Jason Martin, Global Customer Care Team, for Medidata stated, "Using Zendesk has allowed us to increase overall productivity with an agile environment. Customers benefits from this in better customer service, which we see resulting in higher customer satisfaction."*

## CONCLUSION

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The time that you have taken to read this document and consider the impact of customer experience on your organization is the first step in a change in thinking and ultimately culture. A proactive pursuit of changing the organizational perspective to one based on the precepts of customer experience holds many benefits to the organization. Consider the following:

1. Customer experience is a measure against which customers are consciously or unconsciously comparing the organizations with which they engage – whether in a B2B or a B2C context. An experience on Amazon influences the experience expectation when purchasing office furniture.
2. Customer experience extends through and includes all areas of the organization. Properly sourced raw materials and appropriately hired and nurtured employees and partner representatives have an impact on customer experience.
3. Integrated internal systems (software, etc.) are key in supporting customer experience but can only be successful when operating within a culture of customer experience.
4. Supported, nurtured, and trained employees are key elements in providing a differentiated customer experience.

## CASE STUDIES

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### Just Eat Company

Just Eat is an online and mobile takeaway food ordering service. Started in Denmark in 2001, it became listed on the London Stock Exchange in 2014. From humble beginnings in a Danish basement in 2001 to its 2014 listing on the London Stock Exchange, it now operates in 15 countries across Europe, South America, Australia, and New Zealand. Customers in its countries of operations can view up-to-date menus from a variety of takeaway food providers, order food from their favorite restaurants from the Web site or on a mobile phone, and pay either online or in person when the order is fulfilled by the local restaurant. Just Eat's goal – "Empower consumers to love their takeaway experience ..." – sets the tone for the proactive customer experience it is striving to provide to its customers as well as the bar it sets for itself.

#### *Requirements and Solution*

Just Eat had been experiencing tremendous growth, scaling at 50% a year, and with that growth and its own goals to out-service competitors, it had the requirements of needing integrated processes for customer handling, insight into customer context, resource efficiencies, and general reporting capabilities of data and in particular for SLA commitments to customers and restaurants.

From the customer-handling perspective, the company was on several different systems for email, live chat, and telephony. The company needed to move all channels into one system to enable it to report on the contacts and give it insight into the customer's history and purchase patterns as well as to make the ordering process more efficient. Besides getting the food efficiently ordered and delivered, Just Eat has its restaurant partners it needs to service. An example of restaurant service is putting its menus online or getting them updated. Any changes need to be reflected on the Just Eat site quickly, so Just Eat has internal SLAs that it needs to track to satisfy the restaurants.

To meet these needs, Just Eat selected Zendesk. Just Eat never considered a noncloud product for its solution. The requirements for flexibility and scale dictated that the product be cloud based. Just Eat did not want the burden of buying more and more hardware. Just Eat went through a phased rollout in implementing Zendesk. It tackled one department at a time, starting with first line support, then second line support, and finally third line support, providing training to the agents and building business processes that matched their business into the product.

### ***Benefits and Lesson***

The benefits to the business have been many:

- From an agent perspective, Just Eat reports that the system is making its job more efficient, giving it insight into customers, and it is hoped that as it gets used to having the tool and becomes more comfortable using the tool, it will be able to deliver better resolutions to the customers.
- From a business perspective, the system has made the company's internal processes more efficient and brought a level of visibility and insight across its business. With over 500 people in the United Kingdom alone and 200 distributed through the world in other countries, it can now work off one system. Through data understanding, it can see what its resource requirements are against order volume, which is enabling it to manage against KPIs. This in turn allows the company to set accurate SLAs with restaurants. Overall, it has experienced more generalized efficiencies that has allowed it to better manage resources.

While the implementation is generally regarded as highly successful, there are always growing pains. For Just Eat, the biggest growing pain was getting the behavioral change through the agent population: getting everyone to rely on the system. The system is bringing efficiencies, but there are a few tasks that the agents must complete during their workflow. At the completion of a call, agents must input some final data to close the case. Over time, it hopes to bring insight into multichannel customer case flows and is still working on the reporting to reflect what it really wants to know from the data it has collected.

Kelly Batchelor, Group Operations Program Manager, stated that Zendesk has revolutionized the way the company works and services its customers. With employees around the world working on a common system, the company can gain insights into performance and customer satisfaction across all countries.

### ***Medidata Solutions***

#### ***Company***

Medidata Solutions is a cloud-based provider of software, which provides an integrated platform of applications to the clinical trials industry. Medidata clients are pharmaceutical companies, doctors, and nurses engaged in clinical trials that need software to manage, monitor, collect, and analyze their data.

## ***Requirements and Solution***

Medidata wanted to simplify from having many ticketing systems to having only one cloud-based platform for scalability and flexibility. (The primary demand was for externally facing agents that comprise 95% of the usage, with another 5% usage coming from the internal help desk.) This had its challenges as the company's management was looking for a system that would support its varied user base, which would also mirror its own perspective on cloud-based software. Therefore, the management team would not consider any architecture other than a SaaS-based provider.

## ***Benefits and Lesson***

Medidata has experienced many benefits through the use of Zendesk as its ticketing system. For agents, the simplicity of how their workflow is configured allows them to perform their job easily. Account managers are able to track tickets via SLAs to see which tickets need immediate attention. And thanks to the customer-facing Help Center, customers no longer have to call Professional Services or the Help Desk to check in on the status of their ticket.

Help Center also provides customers with the empowerment to solve their own issues. For instance, a common problem such as "resetting my PIN" does not need a complicated agent answer. Medidata leverages Zendesk's knowledge management system within Help Center to provide "deflection articles." These deflection articles help customers solve their own problems without opening a ticket or calling the Help Desk.

Thanks to Insights, Zendesk's metrics platform, Medidata is able to track the success of its agents and tickets. Examples of key metrics Medidata keeps a close eye on via dashboards created within Insights are customer satisfaction, turnaround time for tickets, and organizational metrics such as which team did the request come through and which group handled the ticket's resolution.

Medidata has reorganized around the customer and is moving toward an effortless customer experience. In the past, because of having its tickets spread out over several systems, it was difficult to get a full view of a customer's experience with Medidata. With the added visibility of metrics and one platform, it is able to determine if a customer had a high- or low-effort experience.

Medidata learned a couple of valuable lessons in its use of Zendesk in terms of how to deploy a system for simplicity. Initially, the company had deployed the technology across two instances, which reduced its ability to communicate effectively. It has since combined that into one system. Second, perhaps because of the simplicity of the tool, it greatly expanded the use of fields. It now sees that it should have been more restrained in how many fields it used.

As Jason Martin, Global Customer Care Team, for Medidata stated, "Using Zendesk has allowed us to increase overall productivity with an agile environment. Customers benefit from this in better customer service, which we see resulting in higher customer satisfaction."

## ***NatureBox***

### ***Company***

Founded in 2012, NatureBox is an online snack delivery service headquartered in Redwood City, California. Customers are empowered to choose the plan that best meets their snacking needs, including the frequency (once a week, every two weeks, or once a month), the number of snacks (5 or 10 snacks), and snack choices. The company's differentiation in the snack world is not just its convenience but the offering of snacks and quality of the snack ingredients. Produced by NatureBox,

the snacks contain no artificial nonsense and are made with thoughtfully sourced ingredients. Customers can personalize their "pantry" of snack choices and/or allow NatureBox to surprise them. Either way, the company offers a 100% satisfaction guarantee on all snacks, with free return shipping.

### **Requirements and Solution**

As a 100% online entity, NatureBox experienced growth pains felt by many other start-ups: establishing and growing the business, employees wearing multiple hats, and responding to the needs of the growing customer base. In the beginning, NatureBox maintained its customer information in the ecommerce platform but quickly reached a point where it needed a real CRM product. In 2014, for the customer service and support platform, NatureBox selected Zendesk for its ease of use and customization, cost, 100% SaaS-based architecture, and Zendesk's philosophical fit with NatureBox's own culture as a fellow start-up. NatureBox started first with the email channel as the channel with the highest customer traffic, followed by telephone. This allowed NatureBox to have a record of the interactions with customers through the ticketing function, something it did not have prior to Zendesk. After the initial implementation, the company has continued to evolve the customer service operations to support more channels. Most recently, it incorporated Web chat on the site. It began with the introduction of the chat capability on selected pages and then rolled the capability out across the site.

### **Benefits and Lesson**

According to Dawna Blocher, director of Customer Support, the ease of use and customization of the product has had significant benefits for NatureBox. The tool is easy to navigate for agents who can easily see their work and use macros, making it easy to complete their tasks. The ability to add widgets that sit off to the side allows agents to view data from other systems but not leave their home screens and remain in the context of their work. Teams can easily communicate with one another, create lists, and share documents. With the very easy-to-use plug-in app for chat, NatureBox was able to launch the chat capability on the Web site in 30 minutes in a customizable way. Within three to four hours of training the agents, the company was able to bring agents online and handle three to four customers at a time. NatureBox's goal is to keep the number of customers per agent low to maintain the quality of interactions and to not overload the agents. Since the first day of operations with Web chat, CSAT in chat has been running 5% higher than in email or phone. Although the tool has gotten high marks for its ease of use, it is itself an evolving solution. Within 90 days of launch, chat has become the leading support channel, accounting for more than 60% of tickets. Among NatureBox's tasks of Zendesk are reporting capabilities more suited to a production environment where monthly data is required.

In the end, Zendesk has enabled NatureBox to shift its customer support processes over to one tool. In this way, it is able to provide a consistent customer experience to its customer supported by one platform. Blocher came to NatureBox because she "want(ed) to be with a company where they value and they understand that the investment in a solid customer service platform and delivery of service is an integral part of the organization and the growth of the business and it lays the foundation for your long-term reputation and growth." With NatureBox, supported by the investment in Zendesk, Blocher found that company.

### **Real Estate Company**

The Web-based real estate company IDC interviewed has a mission statement that is clearly focused on its customers' success. The company is doing this through a community approach in creating a community of buyers and sellers around itself. The company's Web site is not just a resource for those looking to sell now but a resource for ideas for improving your home and in general providing a space for both consumers and sellers to meet, discuss, and exchange content and ideas about one of the biggest and most important assets they will own in their lifetimes.

## ***Requirements and Solution***

The goal of the company in building a platform was to establish itself as a real estate resource upon which people can rely and to build a community around itself. Unlike other similar real estate initiates, this company does not have a monetization element on its Web site such as advertising. The company makes money by earning a real estate broker's commission and pays its agents a base salary and a bonus that is based on a customer satisfaction score from the customer. Part of that satisfaction is to make the buying and selling of a house as smooth as possible. The company is organized into teams for selling where internal individuals focus on the paperwork and agents focus on working with the customers.

The company faced the issue of several systems that needed to be tied together in order to gain both a smooth business process and a cohesive customer-handling process. The environment into which the company was looking to bring a solution was made up of a Microsoft infrastructure, Google email, and an internally developed Web site. The company's Web site is the critical customer-facing technology on which customers search for homes, search blog postings, and track their transactions with the company if they have one. The back-end or internally facing view to the company's Web site features a capability that agents use to track deals, book tours, and so forth. The company was looking to replace an on-premises ticketing system with a cloud-based solution to relieve the company of maintaining a system and its hardware and remove the burden of uptime from its responsibilities. It wanted to move to a system that would give the company a better feature set, with greater flexibility and customizability. In addition, the company wanted a solution that it could also use to support its own staff for internal help desk changes and requests.

## ***Benefits and Lesson***

The benefits to the company of its Zendesk installation over the past three years are many. As an organizing principle, it has brought one platform to the company upon which multiple constituents can communicate. In addition to the obvious benefit for which it was purchased, supporting external customers for the customer service agents' use, it is now the internally facing platform for routing IT tickets as well. Previously, there was one email inbox into which technical issues, such as issues with the Web site, were sent. Now the teams of both customer service and IT can route and converse with engineering regarding issues that span the two teams on a common platform and are able to track the various handoffs.

Compliance is also a significant issue within the real estate market. As a broker, the company has a license to the multiple listing service (MLS), which lists real estate inventory. As a broker listing the inventory on its Web site, it is required to be accurate and up-to-date in accordance with the MLS requirements.

Zendesk has also provided the company with the needed data to understand its business and enables it to be more productive in delivering value to its customers. The company is conscious of its margins. With the increased ability to answer a higher volume of tickets and the scalability of the solution, the company is optimistic that it can support its business on the current solution for some time.

While the company acknowledges that there is an ongoing monthly cost associated with cloud-based systems, a representative from the company states, "Once you move beyond that in your thinking, you can concentrate on how cloud-based systems free up your time to do other things."

## APPENDIX

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### IDC's Experiences Definition

IDC defines four experiences as contributing to a corporate experience strategy:

- **Customer experience** is the entire process over the lifetime of a relationship related to the interaction between customers and an organization with which they engage. In this context, customer experiences can range from a single transaction to an ongoing relationship over a period of many years.
- **Employee experience** involves the interactions of employees with their employer across the lifetime of their employment. This spans the recruitment, hiring, and development of employees and the treatment of an employee in which the employment period results in satisfaction for both the organization and the employee. In the case of an experience with positive results, the organization realizes a self-actualized employee experience with the employee and makes that employee a natural extension of the company's strategy and a brand ambassador.
- **Partner experience** is an extension of the organization's relationship with both its customers and its employees. Partners must execute on the brand's customer experience strategies on behalf of the organization as well as be included in the organization's employee experience management processes.
- **Supplier experience** recognizes that suppliers are a strategic piece of the customer experience for product companies as they supply the components and services that deliver on brand expectations. Suppliers engage with product companies on negotiations, design, delivery, support, and the finance supply chain processes. The process is often iterative, and many companies rely on their suppliers to provide product innovation.

### *Components of Customer Experience*

- **Culture, strategy, and processes.** The organization's culture is central to making a CX strategy work. Leadership must show support for CX initiatives because the ripple effect through the organization is profound. The instantiation of this cultural directive is found in the strategy and processes that support it.
- **Products and services.** The product or service that the company offers is intrinsic to the satisfaction of the customer, and it must fulfill a need or demand.
- **People.** Customers are obviously at the center of CX. But the company's employees are just as important, if not more so, as they are in the direct flow of delivering the customer experience. Employees are the advocates and evangelists for the company. In addition, suppliers and partners enable the production, sales, and implementation of the product or service, requiring them to understand the organization's strategy in order to represent its brand.
- **Information.** Information includes all of the content, data, and analysis that are distributed between key participants: the customer and the organization, by employees to other employees, and from partners to customers through the delivery and support of products.
- **Access.** Access includes all the touch points through which a customer experiences an organization.
- **Technology.** Technology, including both hardware and software, supports and automates the CX environment.

## Methodology

### **IDC's 2015 EXPERIENCES Survey**

IDC's *EXPERIENCES Survey* was put into the field in February 2015 and administered via a Web survey. The respondents were screened to ensure that they met specific requirements. Only those respondents that met the following criteria qualified to answer the entire survey:

- Respondents' work location was in the continental United States.
- Respondents were specifically involved in planning, participating in, or managing a customer experience strategy.
- Respondents were employed at United States-based locations with employee bases of 50+.

In addition, please note the following:

- Base = all respondents
- This survey is managed by IDC's Quantitative Research Group.
- Data is weighted by industry and employee size, except for industry and employee size figures that represent actuals for the survey base.
- Use caution when interpreting small sample sizes.
- All numbers in this document may not be exact due to rounding.

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