ZOHO

ZOHO
BUSINESS
PULSE

Driving growth through support transformation

Leverage an integrated help desk for efficient ticket resolution and data-driven support improvement

About Business Pulse

Zoho Business Pulse is a technology magazine tailored to the challenges facing mid-market and enterprise organizations. Each issue centers around a key element of business strategy, offering industry research, thought leadership, and strategic advice to help leverage and extend your current technology ecosystem.

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Message from Ricky Thakrar

I Head of Zoho Account Management

Traditionally, support has been seen as a necessary post-sale service, rather than a driver of growth. But more and more—across industries—companies are realizing that they have a valuable opportunity to use support engagements as a way to grow the customer's investment more holistically.

Revenue models are shifting to focus more on total contract value rather than a single point of sale. Companies can double or triple the total revenue from a customer if they can sell adjunct services or accessories after the primary purchase. Support—as the most frequent post-sale point of contact between the customer and the company—is in a unique position to drive those revenue gains.

But capitalizing on this opportunity requires organizations to really focus on delivering a high-quality customer journey. This means shaking off preconceived notions of support as a slow or frustrating experience, and consistently delivering fast, efficient issue resolution to earn customers' loyalty and create space for cross-selling and upselling.

To deliver loyalty-building levels of support, CSRs need a complete view of the buyer, their preferences, their pain points, and their purchase history. In other words, support teams need help desks that offer a lot of the same data as a CRM.

Intelligent help desk platforms like Zoho Desk create a connected environment of ticket, issue, and customer information that sets agents up for informed, productive conversations. From automatic routing of customers to agents based on factors such as skill, availability, and ticket volume, to AI-powered sentiment analysis and reply assistance, Desk features improve the support experience and drive customer trust.

Better support means better outcomes for other departments as well. With integrations across the organization, from finance to BI, Zoho Desk brings customer journeys and organizational growth together for a unified, customer-centric business.

Schedule a call with an Account Manager

What **Zoho Desk** feature do you wish **more users** knew about?

★ ★ ★

Zoho's Account Management team helps organizations across industries grow the value of their Zoho implementations. They regularly work with larger customers to strategize ways to tackle their business challenges by using the Zoho suite. We asked members of the team to talk about their favorite Zoho Desk features that users might overlook.

" *Blueprints for building QA into every step of the support process*

With the Blueprint Widget, support managers can determine every step in the support process, from stage length and escalation rules to automated agent routing based on stage, skill, or availability. It's an intuitive, visual way to map and automate your support process.

Blueprints help ensure that the support experience remains consistent regardless of channel or agent. They guide agents through every step needed to close or advance a ticket, which allows new agents to start handling tickets effectively without going through an extensive onboarding program.

Blueprints can also include specific validation rules for any field. Validation makes the data entering the support system more accurate, more complete, and more usable for reporting and analytics, so validation at the point of capture can save a lot of work later when the organization wants to get insights about its customers.

Max Goldfine
| Account Manager

" *The Sandbox environment for risk-free testing*

Sandboxes in Zoho Desk give admins and developers a controlled environment to experiment with changes before deploying them to a live implementation. That might mean adding new layouts and fields, modifying workflow automations, or updating Blueprint configurations, any of which could be risky to do in a production environment. Errors and data losses in the production environment can cause cascading breakages and use up resources across the organization to resolve.

When admins make changes in a sandbox instead, they can test out scenarios, debug the issues, and build solutions before live implementation. They can see all the risks that their planned changes could pose to existing data flows without actually having to take those risks.

Tony Lunde
| Account Manager

" *Custom SLAs for internal accountability*

We usually think of SLAs as a promise to the customer, but they're also useful within a company. When customer tickets get handed off to another team for resolution, that team needs some accountability with the support department to resolve those tickets on time. Most companies also need a way to manage their internal customers, such as other employees and teams. It's critical to provide a timely resolution for tickets from those internal stakeholders to keep sales cycles moving forward.

With Custom SLAs in Zoho Desk, teams create set rules that reflect standards for cooperation or communication among the teams involved in solving a ticket. When those internal timelines or expectations haven't been met, tickets are automatically escalated according to whatever rules have been established.

Internal SLAs also cut down on the amount of work that support agents have to do in escalating tickets, tracking them, and asking for status updates about them. This tends to reduce misunderstandings and keep tickets from getting lost in the shuffle instead of resolved. Once they are resolved, support teams can review SLAs and see which ones were not met. RCA can then be done to improve missed SLAs, create new process improvements, and establish more attainable resolution times. This contributes to a more efficient business operation, improved CSAT scores and overall internal stakeholder satisfaction.

Melissa Flater
| Account Manager

New to **Zoho Desk**

With enhanced customizations at every step—from modules and data validation to the mobile and developer experience—Zoho Desk brings support teams and help desk data into the center of the customer experience journey. With new features for streamlining ticket resolution, reducing manual entry, and increasing accessibility options, Zoho Desk makes it easier to capture, analyze, and maximize the value of the customer insights your support teams uncover every day.

Ticketing experience

➤ Schedule reply

Zoho Desk allows an agent to choose a future date and time when their response will be sent to the customer, including times based on the customer's time zone. Agents can edit, reschedule, or delete scheduled replies at any time before they are sent.

➤ Mass reply

This feature allows agents or team leads to address multiple similar tickets with a single response. Rather than responding to each ticket individually, the user can select all relevant tickets and send a message to all the affected customers at once. This not only saves time but also ensures consistency in communication when ticket volumes are high.

➤ Mass resolve

Zoho Desk now allows users to apply the same resolution to multiple tickets as a bulk action. For outages and other issues affecting many customers at once, mass resolution offers a faster way for agents to clear up solved tickets and move on.

Mobile experience

➤ Custom dashboards in Radar

Zoho Desk's mobile Radar app allows agents and managers to track support activities through real-time stats and dashboards. Users can now create their own custom dashboards in Radar to focus on the KPIs, ticket trends, and agent metrics most important to them. Users can also organize their dashboards into folders based on themes or projects, and pin frequently-used dashboards to the main menu grid for quick access.

➤ Text-to-speech in ASAP mobile SDK

Zoho Desk now allows you to offer text-to-speech (TTS) functionality to users of your mobile app's knowledge base, including speed control, pause, and stop functions. TTS is accessible through Zoho Desk's self-service portal mobile SDK and has been implemented for React Native and Flutter apps.

➤ Guided Conversations mobile SDK

The Guided Conversations mobile SDK allows your developers to create fully customizable automated chat flows for your business's mobile app, enabling self-service experiences such as booking appointments, placing orders, and submitting tickets. The SDK is compatible with both Android and iOS applications.

Field enhancements

➤ Lookup fields

Lookup fields in Zoho Desk link records from one module to another within Zoho Desk, establishing a connection between related pieces of information and making it easy to access one module from the other.

➤ RegEx in layout and validation rules

RegEx (regular expressions) in layout and validation rules allows you to define specific patterns for data input within fields. This enforces data validation based on predefined criteria, preventing incorrect customer data from entering the system. You can create custom RegEx patterns or choose from our gallery.

➤ Ticket ID customization

Ticket IDs provide a unique reference point for coordination, organization, and prioritization of support requests. You can now define your own alphanumeric format for ticket identification and go beyond the default sequential numbering. Specify the prefix and suffix of the ticket ID by choosing components such as ticket due date, priority level, channel, category, and more, or create custom components.

Accessibility controls

Zoho Desk is WCAG 2.1 compliant and we are constantly working to enhance its accessibility features. We've added a focus ring to identify the currently active portion of the page, page navigation controls for screen readers or keyboard navigation, and custom cursors for different visual needs. We've also added four new supported languages, bringing the total number of supported languages to 24.

The new potential of customer support: from cost center to growth engine

Transform your support delivery for efficient ticket resolution, frictionless customer relationships, and connected, complete, BI-ready support data.

**DANIEL WOOLSEY, Managing Editor**
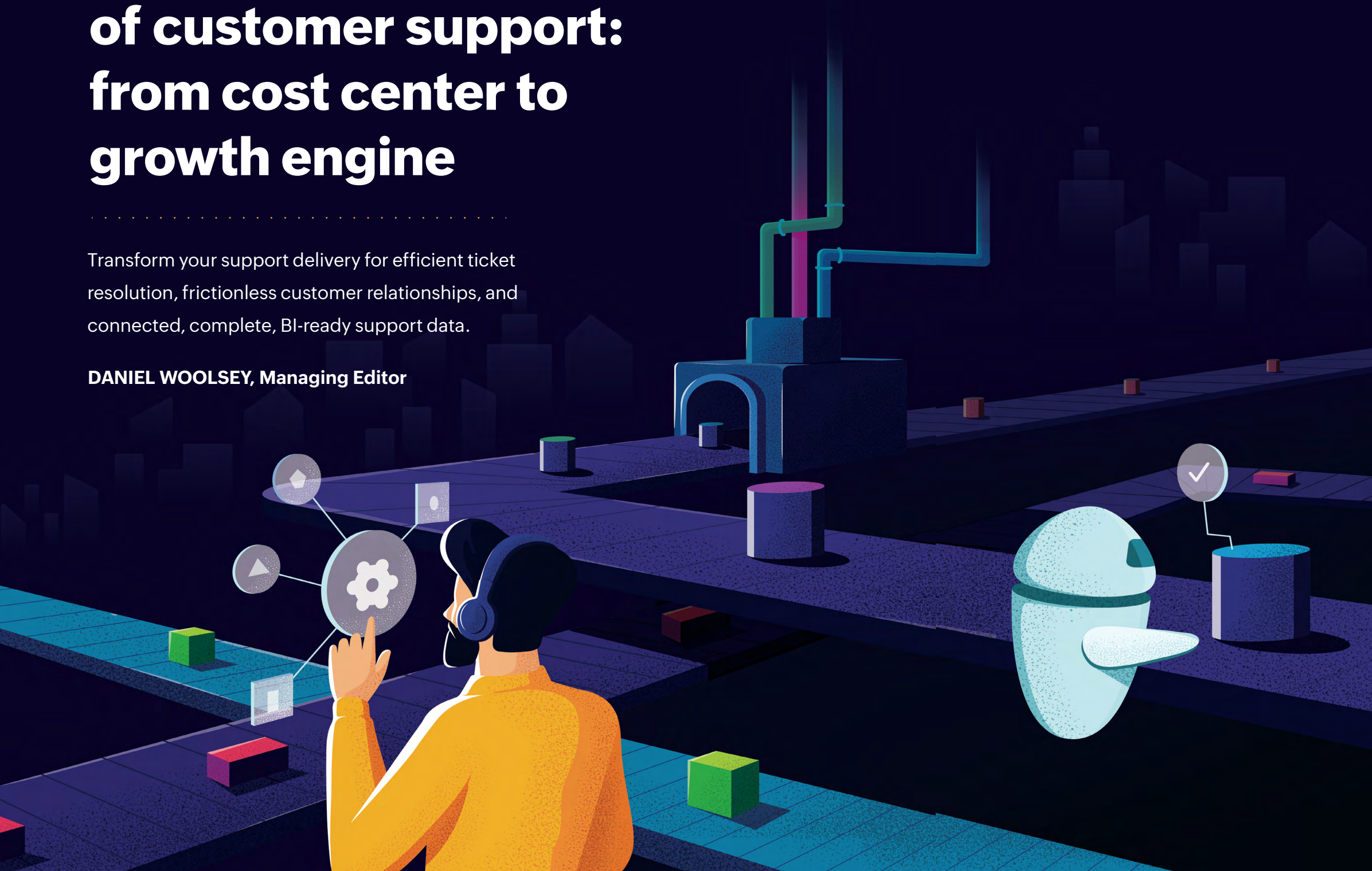
Support departments are under an extraordinary amount of pressure. As organizations realize the essential role of support interactions in customer-first business models, it's an empowering moment for support teams and an opportunity to rethink the boundaries of their role. But at the same time, the core help desk functions are evolving into demanding new forms that require agents to split their attention between more channels than ever before without sacrificing quality or speed. Organizations need extraordinary support platforms that enable agents to deliver a consistent, frictionless customer experience at scale.

A fully-featured support platform like Zoho Desk can enhance support teams' capabilities and help them meet the challenges of the moment. Disconnected support channels can be brought together into a unified interface; AI-powered assistance can keep agents informed and ready to deliver solutions on every ticket; and support databases can be designed to reflect the organization's specific structures and processes, and the data made available where agents need it.

In this installment of **Zoho Solution Highlights,** we'll explore support features that are enhancing agent efficiency and knowledge, bringing customization to essential customer and ticket data, and building a consistent, connected customer support experience.

Multichannel Support

Zia in Zoho Desk

Custom Modules
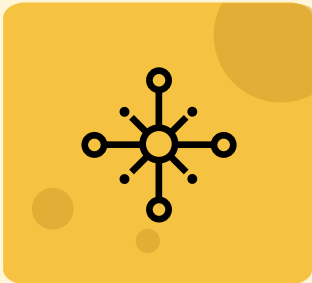
Multichannel support

A unified support experience for customers and agents alike

Bring all of your support channels together for streamlined, consistent ticket resolution and scalable efficiency.

PROBLEM

When customers reach out for support on multiple platforms, it's hard for agents to find, contextualize, and resolve tickets on time.

► **Customers** are accustomed to reaching companies through social media, live chat, phone, and more. Meeting them where they prefer to be eliminates an early point of frustration in the support process. But when issues are coming in through multiple channels, support agents' work becomes spread out and disorganized. Some customers may even choose to reach out multiple times in different ways for the same question, especially if answers are slow to come. Agents may either duplicate each other's resolution attempts or miss important context that happened in a different channel.

Checking multiple channels individually, over and over again, makes it very difficult for agents to keep up with the ticket queue and meet SLAs. With issues being resolved slowly, or agents reaching out with non-context-informed responses, the customer experience will be slow, disorganized, and unsatisfying. Unhappy customers may take their negative experiences to social media, where support teams may not even see them or be aware of the issues.
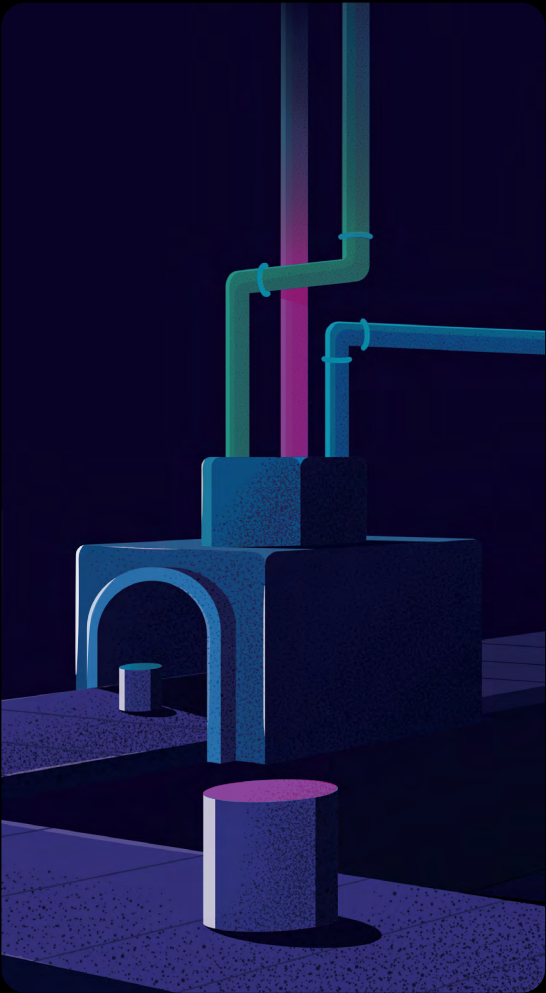
SOLUTION

Bring tickets from all channels together to give customers a unified experience and agents a single-UI workflow.

► **Rather** than sending agents to hunt for tickets and context, pull requests from all of your support channels and bring them into one UI for agents to work from. Desk integrates seamlessly with multiple communication channels, including email, phone, live chat, social media, and web forms. Once customer communications are pulled into Zoho Desk, they can be converted to tickets—either automatically or manually—and routed to agents using custom assignment rules. Channel attribution keeps track of how each ticket came in so that agents have a clearer idea of the customer's context and contact preferences.

USE-CASE SCENARIO:

A SaaS provider with a digitally savvy user base receives bug reports, feature and upgrade requests, and general shout-outs through its Facebook, X, Instagram, and Reddit handles, as well as in email and through the contact form on its website. The company's reputation for responding on any channel is part of its customer appeal, but even with a large support staff, they struggle to keep up with the flood of customer contacts and to identify urgent requests in time to deliver prompt resolution.

To tame the chaos, the support department activates Zoho Desk's social module, allowing the team to automatically pull in timeline posts, messages, and @mentions from all of the company's social media profiles, and search for the company name in public posts to find additional customer issues. When a customer posts an issue in a social comment or @mention, it's pulled into Zoho Desk and converted to a ticket automatically. If the customer has interacted with support through their social account before, the new ticket is connected to their previous tickets and any contact information that's been entered in Zoho CRM. Now that the agent doesn't have to search multiple platforms for support requests, they have more time to dig into the customer's ticket history and reach out with informed, effective resolutions.

OUTCOME:

A more efficient support operation leading to improved resolution metrics and increased customer satisfaction

► **Multichannel** support delivers improved outcomes for customers and support teams alike. Bringing support channels together into a centralized and context-rich environment can transform a reactive support operation that's just treading water into one that's responsive, efficient, and poised to deliver consistent customer satisfaction.

With less communication friction and easier access to context, agents deliver richer, more context-aware answers faster, improving support metrics/meeting support KPI goals. Streamlined work and fast access to answers means shorter time to first response and resolution. Consistent SLA compliance provides customers a reliable experience, leading to more trust and satisfaction. The deepening customer relationship becomes a positive feedback loop, building a foundation for growth with customers as enthusiastic promoters.

Zia in Zoho Desk

Next-generation customer support powered by contextual AI

Reduce response times and enhance support quality by providing agents with AI-powered ticket analysis and suggested actions.

PROBLEM

Large support operations can fall behind as agents struggle to solve wide-ranging problems at scale.

▶ **The** volume of tickets in many support operations can be overwhelming. And as agents search through large knowledge bases to find the right answers, ticket backlogs grow and customers become impatient. If agents don't have the customer's ticket history on hand at the start of the conversation, aren't aware of past contacts, or need to hand the customer off to someone else for a solution, this creates more friction: every time the customer needs to re-describe their problem, a little bit of trust and goodwill is lost.

In this rushed environment, agents can easily miss opportunities where quick intervention or a simple fix could prevent customers from becoming frustrated and leaving. Manual tagging leaves lots of room for interpretation, and when agents describe the same problem in different terms, it's difficult to spot trends and anomalies. These inconsistencies in ticket tagging make data difficult to combine and analyze, slowing down root cause analysis and fix development.

SOLUTION

Equip agents with AI tools designed to offer essential context, smart automations, and consistent tagging.

▶ **By** bringing AI into your support practice, you can dramatically increase the speed, consistency, and effectiveness of even the most junior support reps. Use Zia's auto-tagging and keyword monitoring to help agents organize and optimize ticketing triage. If a ticket is tagged as a cancelation or payment failure, Zia will mark it as high priority and move it to the top of the queue. Tags can be generated for every thread and customer response, offering agents at-a-glance insights into the history and status of the conversation. Once ticket tagging is standardized, Zia can identify trending topics and offer insights into the next best steps.

Zia also scans tickets to assign dynamically updating thread-level keywords. Keywords can be set to re-route tickets to another team, update ticket fields, or trigger alerts and notifications. To reduce the time that agents spend answering basic questions, Zia's Reply Assistance feature scans incoming tickets for key terms and suggests the most appropriate solution from your organization's knowledge base. These suggested replies improve the accuracy and quality of the answers, reduce the need for incoming follow-up calls, and bring greater consistency to the customer experience.

USE-CASE SCENARIO:

A cellular service provider receives a large volume of tickets about service and device troubleshooting, account issues, and phone purchases. Because of the range of issues involved, it can take some time for agents to narrow down the problem and search the knowledge base for answers. Agents who aren't very experienced with account issues sometimes hand off tickets to the accounts team unnecessarily, simply because they're having trouble finding the answers. As the ticket backlog builds, customers find the wait off-putting and are often anxious or impatient by the time a support agent reaches out.

When the company implements Zia features in Zoho Desk, incoming tickets are automatically analyzed for keywords and sentiment clues. Zia applies tags and a ticket tone and generates an automatic summary of the customer's message to help agents quickly understand what kind of support is needed. The company has created automations for certain specialized types of support, so tickets with the word "return" or "replacement" are automatically routed to the returns desk of the phone sales department, while tickets with the word "renew" are routed to the accounts team. As agents work through the remaining tickets, they find answers in the knowledge base quickly by asking Zia's answer bot, and use the reply assistant to speed up the process of drafting responses to the customer.
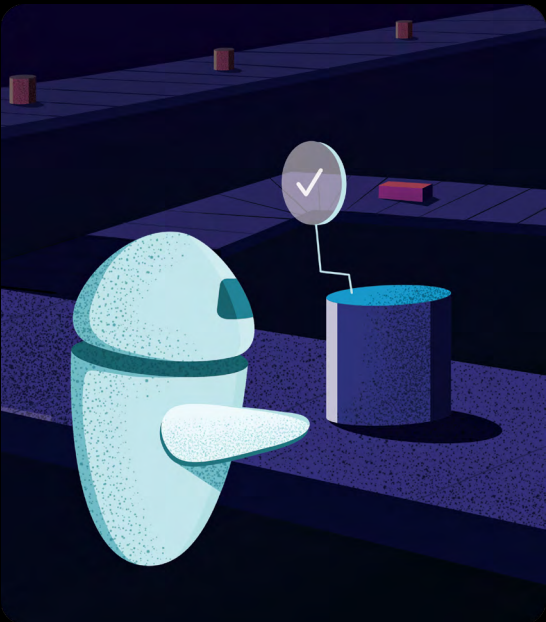

OUTCOME:

Improved customer experience while keeping support teams lean and agile

▶ **By** automating and streamlining service activities, organizations can increase the number of tickets an agent can handle without sacrificing the quality of support. AI-powered assistance can also help bring new hires online faster, while ensuring they deliver accurate and consistent responses.

With agents able to find and deliver quality answers quickly and efficiently, backlogs of tickets disappear and don't build up again. Handoffs of customers to other agents or departments can be reserved for only the complex tickets that need to be escalated, reducing repetitive conversations and customer frustration. The streamlined customer experience translates to improved CSAT and NPS scores. With tags and keywords standardized, tickets become findable and comparable, enabling effective issue tracking and meaningful support metrics for ongoing organizational improvement.
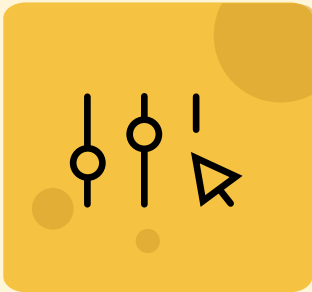
Custom Modules

Flexible data management for superior support and better business insights

Pull key business data into Zoho Desk for faster issue resolution, advanced automations, and a clearer picture of current and future requirements.

USE-CASE SCENARIO:

The maintenance department of a large property management company is responsible for HVAC repairs in the company's commercial properties. In addition to tracking the service calls completed, the maintenance department needs to track each piece of installed equipment and its service record separately. To capture this information, they've created custom modules in Zoho Desk. The Properties custom module contains a record for each shopping plaza and office park, including the address of the property, the location and key code for the utility room, and the name and contact information for the onsite manager. The Suites custom module contains a record for each individually leased unit, including the business tenant's name and contact information, the type of HVAC equipment installed in the unit, when it was installed, and how many repairs it's had since it was installed. The maintenance department uses this information not only during the repair process itself, but also to predict when an individual AC unit is likely to require replacement.

PROBLEM

Ticket-based software isn't flexible enough to effectively manage the data required for and generated by more advanced support operations.

▶ **The** core purpose of your support desk software is to help agents close as many tickets as quickly and effectively as possible. Because of that narrow focus, traditional support tools have limited capacity to grapple with the broad array of business information that comes into play with more complex service arrangements. Whereas a CRM allows you to ingest, track, and transform nearly any kind of information or business asset, your help desk is limited by its emphasis on the ticket as the central pillar of the support practice. Tickets are great at tracking basic contact and issue details through custom fields, but not every element of your customer relationship or service offering can be effectively mapped into that model.

When your support agents start to engage with larger business dimensions—such as locations, physical resources, or third-party data integrations—a basic help desk may no longer be sufficient to manage that complexity. As a result, companies end up storing key customer information and assets in other systems—such as their CRM or custom applications—which support reps either cannot access or cannot access easily. This not only cuts reps off from the customer's larger context, but it also makes it difficult to automate advanced processes or monitor critical business metrics.

SOLUTION

Create custom records and modules to store, track, and manage critical business information inside your Desk interface.
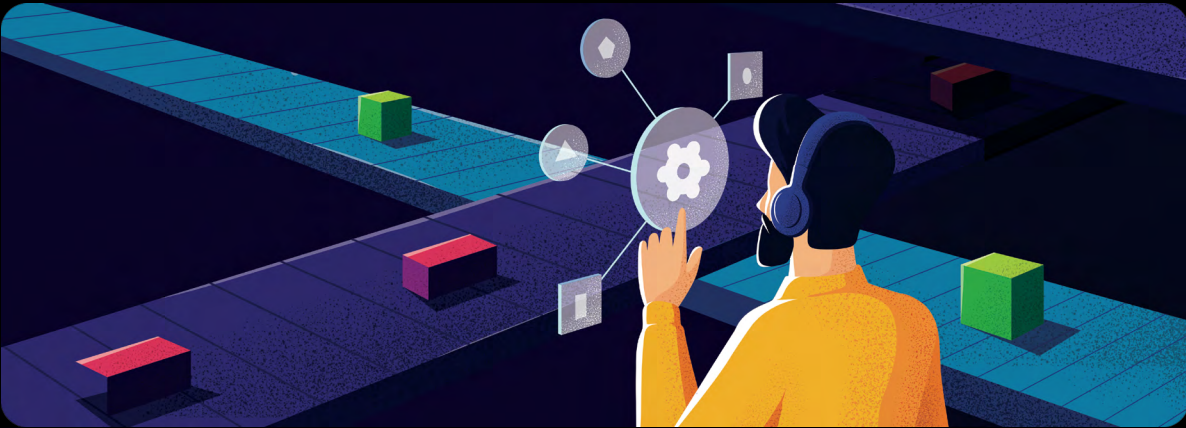
▶ **Custom** modules radically expand the utility of your support desk by acting as flexible "containers" for practically any kind of database record, asset, or information. This allows your help desk software to perform the same kinds of advanced business functions as a highly customized CRM, enriching your agents' understanding of each support request with a nearly unlimited range of information. Depending on your business requirements, this can be handled in many ways:

If the service requires input from an external team, you can create a custom module to separately manage the status of the approval process as well as any documentation that results. If your service requires different types of physical assets, you can build a custom module to track usage and replacement cycles. If you source key information from another system—such as your CRM or a third-party data tool—you can feed that data into a custom module, where support reps can access and update it without leaving Desk, and then any changes they make will be synced back to the main database where appropriate.

OUTCOME:

Better context, better data, and measurable improvements in both ticket resolution and overall business management

▶ Custom modules not only increase the speed and quality of issue resolution, but they also make it easier to integrate the efforts and activities of the support team into your larger business operations. Mapping key processes and data systems into Zoho Desk can help transform your support operation from an opaque, auxiliary service at the edges of your business strategy to a core driver for the success of your offering.

By bringing a broader range of business data into your support interface, you can minimize the amount of app swapping required for reps to follow organizational best practices as defined by leadership. Because custom modules replicate the actual structure of the information and interactions involved in the support department's workflow, they reduce the need for workarounds and redundant notes to store details that don't fit in a ticket. This means reps will generate better, more usable data more consistently, rather than cutting corners in an effort to keep pace with the ticket pipeline. That will give you more reliable insight into the inner workings not only of support itself but of any business areas that come in contact with support. By more tightly integrating support with your business backend, you gain the ability to use the insights from support data in resource forecasting and process optimization across the organization, leading to reduced overhead and more streamlined operations.

Maximize the impact of support interactions with these featured integrations

When agents don't have the current context, the right access, or the needed expertise, support becomes a source of friction and frustration for customers. By connecting Zoho Desk to other parts of the tech stack, organizations can deliver faster, more satisfying resolutions while also uncovering more value from support interactions.

Zoho CRM + Zoho Desk

[Zoho CRM] + [Zoho Desk]

Drive customer-first interactions and cross-departmental collaboration by making customer data more accessible and contextual.

When ticket details from Zoho Desk are situated alongside the customer details stored in Zoho CRM, reps can enter conversations ready to deliver personalized and contextually appropriate responses. This integration fosters a great customer experience at every touchpoint. When prospects need help before purchasing, sales reps can be tagged and quickly jump in to expedite the buying decision. Or for customers with technical questions, sales reps can tag support agents inside tickets to ensure fast responses. Once inside the ticket, key details such as deal value or products used are highlighted to ensure faster, more context-aware triaging.

From identifying cross-sell opportunities to enriching prospect details with information gleaned from support conversations, this integration can bridge the gap between support and sales. And when agents encounter dissatisfied customers who could benefit from working with customer success teams, they can tag relevant account managers to kickstart a more proactive engagement journey. With sentiment analysis, CSAT scoring, and fine-grained reporting and analytics, teams can dig into customer feedback and uncover new ways to refine and improve support systems.

Zoho Projects + Zoho Desk

[Zoho Projects] + [Zoho Desk]

Convert customer support tickets into tasks and projects to facilitate more effective task management and close the gap between development teams and the customer.

When tickets require multi-step processes, handoffs, or cross-team efforts, the customer service tenets of accountability, communication, and urgency can fall by the wayside. But with the Zoho Projects-Zoho Desk integration, teams can make use of project management features such as subtasks and milestones to ensure they are meeting their service agreements. When a support agent pushes a ticket to Projects, the product team that picks it up can leverage project management functionality such as subtasks, milestones, and SLAs while resolving the issue. Front-line reps can see key project details inside Desk, enabling them to deliver prompt and accurate status updates to customers during the resolution process.

Capture feature requests and quickly turn tickets into tasks with the Zoho Projects bug tracker. Production managers can add converted tickets to project roadmaps, and then assign project milestones that are automatically pushed to existing workflows and reporting tools (including kanban boards, Gantt charts, and other integrated tracking methods). This ensures that all process data is captured, stored, and accessible in a unified place. From stakeholders to development teams, everyone can turn to the centralized source of truth stored in Projects.

Zoho Books + Zoho Desk

[Zoho Books] + [Zoho Desk]

Combat silos and streamline processes to reduce manual overhead for financial teams and deliver faster, more efficient, and accurate support responses.

Accounting is a fundamental part of any organization, but can often become siloed from operations, production, and service departments, creating an information bottleneck. Integrating Zoho Desk with Zoho Books can help reduce delays when fielding finance-related support queries from customers by providing support reps with key financial details from Zoho Books. The integration can also be configured to permit customer service personnel to perform key payment-related actions—such as simple refunds—in Desk, with oversight from the Accounting team. This reserves accounting experts' time for more complex financial work and improves customer service outcomes, contributing significantly to overall organizational scalability.

If billable support hours play a role in your business model, this integration will also streamline the process of charging for them by linking tickets directly to the appropriate invoices. Automating this process ensures accuracy for financial reporting and billing, reduces manual overhead, and offers the potential for reducing support's impact as a cost center or even allowing it to function as a profit center.

Looking to get more from support? Harness the power of analytics.

Integrate advanced analytics with your help desk for improved customer relationships and data-driven support transformation.

★ EMILY SLOAN-PACE, Senior Editor ★
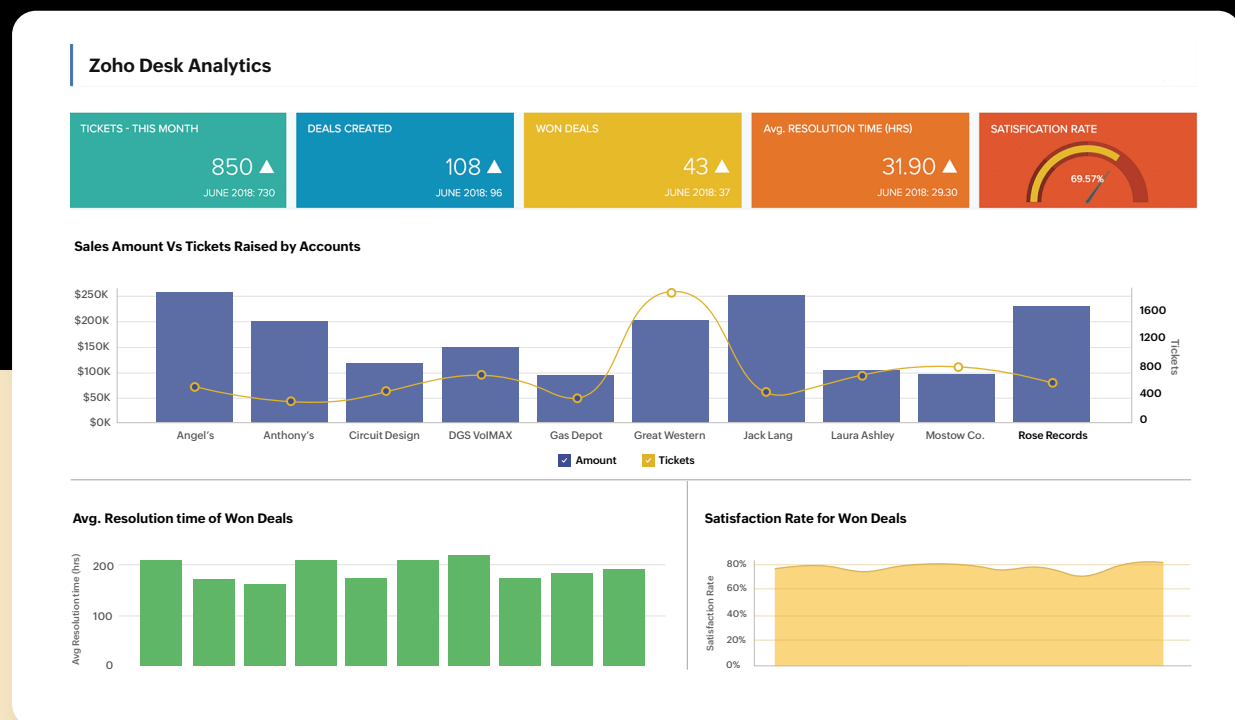
Achieving digital maturity in support requires a data-driven understanding of how customer needs and support resources come together to create opportunities. When organizations integrate Analytics with their Zoho Desk instances, they expand the scope of Zoho Desk and open their entire support operation to data-led transformation.

With Zoho Desk, organizations can organize, centralize, streamline, and run all of their support functions—from responsive help desk operation to knowledge bases and

learning communities. These functions generate a huge volume and variety of data about customers' needs and pain points, how those are being met, and what resources it takes for the support operation to achieve a satisfying customer experience. Adding Analytics to Zoho Desk allows that data to generate a much more detailed and strategic understanding of both the customer and the support operation, leading to insights ranging from how to continuously improve SLA metrics to how to reach customers with more cross-sell and engagement opportunities.

Improving the quality and quantity of support data

Cleaner, more standardized data is an essential resource for organizations that want to foster data-driven decision-making without introducing friction. With the Zoho Analytics integration, the volume of data generated by daily support operations can be cleaned, manipulated, and made legible for meaningful analysis. Zoho Desk's text analysis and keyword extraction tools transform voice calls, social posts, and feedback surveys into quantitative data that Zoho Analytics can mine for detailed business insights.

Fine-grained reporting of the customer's experience and brand sentiment empowers teams to dissect their current processes and identify existing pain points. Deeper analysis of these real-time, ongoing data streams allows organizations to go further and uncover relevant product innovations, new service offerings, and customer retention opportunities that connect support to revenue generation.

Building focused, customized reporting

Strategic decisions require customized analysis. With the Zoho Desk & Zoho Analytics integration, support teams can build customized dashboards and bring data together to track progress on cross-team goals. Map the rate of feature adoption onto the view-counts of individual support articles to identify where customers are struggling. Track friction points in customer experience gleaned from support data to uncover upsell and cross-sell opportunities, then measure the outcomes of those sales efforts on the original friction points.

Data insights and views from Analytics can be tailored for different roles and areas of focus, from ticket resolution times and CSAT scores to the churn rate associated with an individual agent's performance. By incorporating detailed reporting and real-time dashboards inside the spaces employees use most, organizations can foster a culture of data, measurement, and continuous improvement.

More strategy, **more powerful analytics** in our **BI Issue**

Tracking time for measurable improvement

When teams improve their timekeeping, they also improve their bottom line. With Zoho Analytics and Zoho Desk, teams can configure customized time-tracking by agent, module, or department, and collect valuable insights about help center performance. Fine-grained data about what it really takes to resolve a ticket gives leaders an accurate, complete view of support team productivity and ROI.

Select the kinds of actions to be tracked (such as drafting responses, leaving comments, or sending replies), and any time spent on a ticket's follow-up activities will automatically be tracked. With Analytics to process this data, team leadership can better understand the agent time and resources needed to reach their customer satisfaction targets. Analyzing time on task with ticket outcomes also enables support managers to identify high achievers who don't simply close tickets quickly, but also deliver high customer satisfaction. This provides a basis for meaningful incentive programs for high performers and effective intervention for agents who are struggling to meet targets.

Turning good data into great support

For support operations to function as revenue engines and customer loyalty drivers, they need the strategic maturity that comes with data-driven decision-making. Integrating an analytics platform with the support infrastructure can have a transformative effect on the support operation's effectiveness and responsiveness, reducing the mis-allocation of resources while helping ensure agents are consistently delivering a high-quality support experience.

Tickets, customer contacts, and self-service support interactions already generate huge amounts of data about customers' real preferences and pain points. Organizing and blending that data in an analytics solution makes it possible to derive a genuine strategic understanding of the customer journey and experience. When organizations go a step further and bring support data to every employee with customized, role-based reporting, they unlock the potential for effective innovation across the support department and beyond.

Interview
Enterprise Support

Complex implementations require high levels of technical expertise. That's why organizations turn to the Enterprise Support Team for Zoho's fastest SLAs and 24/7 assistance. Zoho's Enterprise Support is staffed with product experts ready to provide personalized, highly technical support. We sat down with SAMIR MEHARALI, head of the US Enterprise Support team, to learn more about how Zoho is solving the support challenges facing large organizations.

Q: How does the Enterprise Support experience differ from Zoho's Classic Support?

Samir: For most organizations, Classic Support does a great job at answering questions and troubleshooting the software problems that businesses traditionally face. Staffed 24/5, they can help users across much of the Zoho suite. But as organizations grow, so does the complexity of their implementation. Enterprise Support emerged in response to the needs of larger customers. That's why we offer faster SLAs and round-the-clock support, with a more personalized, ongoing experience than Classic Support.

With Enterprise Support, every organization is assigned to a dedicated Technical Account Manager (TAM), a Zoho expert who has been with the company for at least five years. Of course, personalized support means knowing more than how a product works; it means knowing how an organization's specific Zoho implementation functions. Armed with a deep understanding of the organization's needs and goals, TAMs can offer better, more specific advice, and a faster time to resolution.

Q: What does onboarding a new Zoho implementation look like for organizations using Enterprise Support? Why do you recommend using Enterprise Support?

Samir: We start by meeting with the Zoho admin and other relevant DRIs to walk us through their organization's goals and priorities. We audit the existing processes, identify the pain points, and design ways to optimize the customer's product use. We then relay this information to the customer in the form of feature demos, product training, and extensive documentation.

Once the implementation is ready, having the right guidance at onboarding can prove the difference between a successful rollout and a failed one. The TAM leads the way, helping the organization's users quickly familiarize themselves with the interfaces and workflows of the new solution. Having that consistent guidance during early usage allows teams to move forward with greater confidence in their systems, their data, and the work that they can do with that data.

Q: What sorts of training and expertise do TAMs hold? How do they maintain deep product knowledge in light of Zoho's pace of product releases, new features, and updates?

Samir: Enterprise Support members have a demonstrated success record as well as a deep knowledge of about a dozen products each. We organize our reps into specialized business units, allowing each to concentrate on different product domains (e.g., Sales, Marketing, or Finance). By avoiding the "jack of all trades" approach, our reps are better able to keep up with the latest developments in their business unit.

Because Zoho is always rolling out new features or products, we reserve a percentage of each member's time to spend on product education and other upskilling activities. Every shift is staffed by members who can provide a comprehensive scope of product knowledge and expertise. We also maintain a low ratio of customers to reps; it gives TAMs more time to learn each customer's needs, an understanding that is key to meeting our SLAs.

Q: What does your team offer to organizations that are already working with a Zoho Partner? How can Enterprise Support provide value to users with enough technical savvy to direct their own large-scale implementations?

Samir: Enterprise Support is a great way to augment your work with a Partner. The Partner captures your business requirements and builds out your Zoho environment. Our team can then supplement their work, bringing broader troubleshooting expertise as well as insights directly from product teams about how to incorporate new and upcoming features into our solutions. Many Partners have reported that they work more efficiently, especially during the implementation phase, when they are supported by a skilled Technical Account Manager.

For users managing their own Zoho implementations, working with a dedicated TAM can speed up the efficiency of deployments and reduce the burden on IT teams. We can help with debugging, solving targeted technical issues, or providing fast responses to application- and feature-specific questions. Organizations using Enterprise Support also get a dedicated support email address for submitting detailed requests directly to their TAM.

A low ratio of customers to reps means more individual attention & understanding
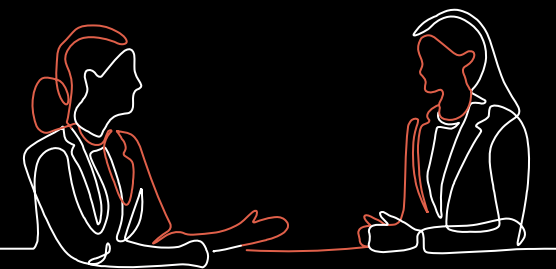
Q: What else should customers expect from working with Enterprise Support?

Samir: The biggest benefit that our customers consistently report is the continuity of service and communication that comes from working with a TAM. Because our teams are both familiar with specific implementations and experts in those tools, it's a lot easier to diagnose and solve problems. And because every organization is given a unique, dedicated support address, tickets are delivered to the assigned TAM's inbox for prioritized response. In the case of new tickets, we guarantee an initial response time of 1 hour.

Another big perk of working with Enterprise Support is getting priority access to the dozens of new features, integrations, and products that Zoho releases throughout the year. Since our team prides itself on constantly upskilling, including a TAM as part of your ongoing support and maintenance team can ensure you're staying on the leading edge of Zoho's tech ecosystem. If you're interested in learning how Enterprise Support can help your team, reach out to your Account Manager to start the conversation.

Bergen Logistics | CASE STUDY

HOW BERGEN LOGISTICS CUT TICKET RESOLUTION TIMES IN HALF

Collaborative ticket handling paired with real-time analytics in **Zoho Desk** helped **Bergen Logistics** reduce costs and significantly **improve CSAT scores.**

Who is Bergen Logistics?

Bergen Logistics is a leader in global order fulfillment, providing last-mile supply chain fulfillment. They serve manufacturers in industries ranging from makeup to medical devices. After starting their Zoho journey in 2019, Bergen soon expanded their Zoho CRM implementation to include Zoho Desk and Analytics.

Shipping logistics is an industry prone to significant variability. Rates can change from day to day, and shipping needs differ widely depending on industry requirements, location, or time of year. So as Bergen's client base grew, so did the complexity of incoming support requests.

What problem led Bergen to choose Zoho?

Bergen's Client Services and Operations teams were facing a massive increase in ticket volume and velocity, but they didn't have the tools to keep up. Client-side support requests were all handled via email, leaving valuable customer engagement data siloed from larger organizational information systems. This also made it impossible to track critical support metrics (like time to first response) or to identify the processes creating bottlenecks.

The lack of visibility was compounded by a lack of automation and overreliance on manual data entry. Compliance reporting generated an endless stream of spreadsheet reports. These spreadsheets held key information that had to be manually entered into the organization's shared drives. Simply maintaining accurate and up-to-date data consumed a significant portion of daily work. And because tickets were answered in the order they were received, the team couldn't prioritize issues effectively.

The result? The Services and Operations team saw an increasing percentage of chargebacks and returned deliveries, a result of mistakes made at the point of shipping. Lack of escalation rules meant the team struggled to meet their SLAs and maintain the trust of their customers. And since so much of their internal problem solving was done via email, leadership had limited visibility into where improvements needed to be made.

What solution did Zoho provide?

Bergen first implemented Zoho Desk for their Technical Support team, later rolling it out to the Client Services team. Teams no longer solve problems via email; now, all communication between colleagues about a ticket takes place inside the ticket. This creates a clear record of the problem, the process, and the solution. And by shifting vital documentation like customer SOPs to a cloud-based internal knowledge base, Bergen's teams can all work from the same information. The result is faster resolution times, better CSATs, and a more comprehensive data set.

When a lead is converted in Zoho CRM, a ticket is automatically created in Zoho Desk to track onboarding and give visibility to all stakeholders, from Billing to Integrations

and Operations. Another custom function for compliance tracks correct shipping: if one of Bergen's customers receives a chargeback from a retailer, a ticket is logged in the Compliance department and prepopulated with information already in the system. This alerts the relevant teams to jump into action and has also helped reduce chargebacks.

By integrating Zoho Desk with Zoho Analytics, the teams at Bergen have been able to achieve deeper data analysis, including dashboards that measure time to first response and time to resolution against industry benchmarks. Real-time dashboards now track ticket volume, resolutions, and satisfaction scores, while a compliance dashboard has replaced spreadsheet reporting, further reducing administrative load.

What benefits did Bergen experience?

With Zoho Desk, Bergen has been able to bring meaningful improvements to every part of the customer journey. When Desk was first deployed, the average time to first response was more than two hours; now it's under one hour. And with greater visibility into the ticket resolution process, Bergen has also found opportunities for tracking department-specific performance as well.

In the short term, Bergen is creating a Tier Zero space integrated with Zia. Already open in Beta, this knowledge base will enable clients to use AI-driven search for self-service support. They are also deploying Zoho Survey for their "voice of the customer" efforts, using it to capture CES and NPS alongside CSAT scores. Down the line, Bergen plans to use Zoho Cliq for faster, frictionless communication between customers and service managers.

Of course, Bergen also reaps benefits beyond those readily visible on a dashboard. Tools like Zia in Zoho Desk have empowered employees to search out data insights and grow increasingly fluent in the language of analytics. This has fostered a broader culture of data and data literacy, leading to richer data and improved decision-making. By focusing on the support experience, they've built a pathway to better business processes across the organization.

Tap into **Zoho's** full **software ecosystem** to get **more value** from your **existing** solutions

With 60+ products and more in development all the time, Zoho offers customizable apps to tackle every business problem. Check out this selection of some of our most useful apps for Zoho CRM users.

CUSTOMER ENGAGEMENT

The Zoho sales platform offers coverage for every step of the sales pipeline. From live website chat to supporting users after the sale, here are a few of our most popular apps for customer-facing teams.

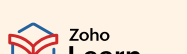| **Zoho CRM**	Deliver great customer experiences through better funnel analysis, robust automations, and a unified sales platform.	**Zoho Campaigns**	Nurture your leads with drag-and-drop email campaigns and track success with fine-grained analytics.
Zoho Desk	Deliver contextual customer support across multiple channels from a single interface.	**Zoho SalesIQ**	Convert website visitors into paying customers with an integrated live chat solution.
Zoho Bookings	Automate scheduling, customize follow-up notifications, and say goodbye to no-shows.	**Zoho Sign**	Send documents for digital signature and track progress across the entire signing process.
Zoho Survey	Get a better understanding of your customers for more effective engagement.	**Zoho Assist**	Remotely troubleshoot customer software issues and resolve support requests more quickly.

BUSINESS INTELLIGENCE & PROCESS MANAGEMENT

As data improves, so do the processes it touches. These Zoho apps help improve data accuracy, streamline processes, and build new workflows finely customized for organizational needs.

Zoho Creator	Design, build, and deploy custom solutions for your organization's unique business needs.	**Zoho Flow**	Automate cross-app processes and de-silo organizational data with Zoho's drag-and-drop integration builder.
Zoho Analytics	Understand past, present, and future business performance with AI-enabled self-service BI.	**Zoho DataPrep**	Connect, explore, cleanse, and enrich data for analytics, machine learning, data warehousing, and more.

PRODUCTIVITY & COLLABORATION

Bring your business communication into the Zoho ecosystem and prevent data from being siloed in disparate messaging apps or project management tools. These fully integrated apps keep conversations moving across every channel.

Zoho Meeting	Conduct secure, cloud-based meetings and webinars to nurture and convert more leads.	**Zoho Cliq**	Drive open, cross-departmental collaboration while keeping your corporate communication secure.
Zoho Mail	Scale your email system with advanced encryption, message recovery, and fine-grained security policies.	**Zoho WorkDrive**	Simplify access management by storing, organizing, and managing team files in a single location.
Zoho Connect	Create a centralized space for team discussions, resource sharing, and employee announcements.	**Zoho Projects**	Plan, track, and collaborate on projects while precisely capturing the time spent on every process.
Zoho Vault	Manage team and personal passwords to safeguard your business accounts from cyber attacks and insider threats.	**Zoho Learn**	Build your internal KBs and employee training programs on Zoho's in-house content management platform.

FINANCE

Reduce the risks of revenue leakage with end-to-end accounting management. The Zoho Finance suite streamlines and automates key financial processes while providing real-time insights into inventory and expenses.

Zoho Books	Handle every aspect of accounting and drill down into the health of your business.	**Zoho Invoice**	Build customized invoices that align with your brand, and automate bill delivery based on project status.
Zoho Expense	Simplify employee expensing with mobile receipt capture, OCR, and one-click reporting.	**Zoho Inventory**	Move to a centralized invoice management system flexible enough to serve every sales channel.

Interested in discussing the other **software solutions** available from **Zoho?**

Schedule a call

Schedule a call with one of Zoho's Account Managers to explore how Zoho can help modernize your business operations.

Continue your journey with our targeted resources for Zoho's larger customers

Zoho for Enterprise Webinars
Get industry insights and learn about new products through our live webinar series.

Business Pulse Solutions Highlights Videos
Want to learn from the Zoho experts? Check out these bite-sized videos to get some quick tips for optimizing your implementation.

Zoho Buzz Newsletter
Sign up for our monthly newsletter to stay in the loop about the latest product updates.

Enterprise Insights Blog
Read the latest in software trends, leadership practices, and business strategy.

Enterprise Perspectives eBook Series
Take a deeper dive into the technology, culture, and leadership trends shaping today's global business landscape.

Zoho's Global Headquarters in Chennai, India

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Thank you for choosing Zoho as your technology partner.

For nearly three decades, we've helped power millions of businesses

to success by delivering scalable and flexible software solutions.

Our relentless commitment to our customers has helped us

grow from a single-product company into an organization with an

ecosystem of 55+ applications, 1500+ marketplace extensions,

and 100 million users around the world.

What **analysts** are saying about **Zoho**

Large customers that have switched from Salesforce to Zoho CRM have realized substantial improvements in efficiency and cost. As a recent study from Nucleus Research shows, these organizations have found a particularly high value from Zoho CRM's analytics, automation, and cross-functional integrations.

Nucleus found that Zoho CRM offers benefits over its competitors in reporting capabilities, due to its built-in Analytics integration. Its powerful platform integrations and automations drive greater user productivity. And organizations that move to Zoho CRM derive significant savings from a reduced need for IT management.

Customers that switched to Zoho reported:

- ✓ **38%** improvement in reporting efficiency
- ✓ **63%** reduction in manual data entry
- ✓ **42%** reduction in total cost of ownership

★ ★ ★

Download the full report to read a **detailed analysis** of select retail and tech sector **customer experiences.**

ZOHO