Zendesk

by Product Operations

`AI Contact Center Intelligence`   `AI Contact Center Agent Assistants`   `AI Conversational Chat`

Details

Review Date	12/08/2023
Purchase Date	Q1'19
Implementation Time	1-2 quarters
Product Still in Use	Yes
Purchase Amount	Base fee plus user-based pricing
Intent to Renew	85%
Review Source	Elion

Product Rating

Product Overall	▬▬▬▬▬	4.0
Use Case Fit	▬▬▬▬▬	4.0
Ease of Use	▬▬▬▬▬	4.0
API	▬▬▬▬▬	N/A
Integrations	▬▬▬▬▬	4.5
Support	▬▬▬▬▬	5.0
Value	▬▬▬▬▬	4.0

About the Reviewer

`N/A`

Reviewer Organization

`Virtual-First Provider`   `Behavioral Health`

Reviewer Tech Stack

`Salesforce`

Other Products Considered

`N/A`

Summary

- **Product Usage: Zendesk was used for customer inquiry management, acting as an information hub and for product roadmapping.**

- **Strengths: Zendesk's community engagement and responsive customer support are its main strengths.**

- **Weaknesses: Zendesk lacks in design and visualization features, resulting in formatting issues and limited customization.**

- **Overall Judgment: Despite some limitations, Zendesk was a good choice due to its easy integration and out-of-the-box features.**

So today we're chatting about Zendesk and how it was used at your previous company. Before we jump into that, could you give a brief overview of the company and your role there?

I was part of a team that blended customer success with product operations, with my focus on the latter. Essentially, I served as the link between customer-facing teams and our internal teams, such as product and data science. This involved receiving customer requests and creating a repository of solutions and guidance to help customers use our product effectively.

What was the need that drove you to look for a product like Zendesk?

We needed to enhance operational efficiency during a period of rapid scaling. Our user base, primarily data scientists and buyers at large pharmaceutical companies, had complex queries about our data product. Triage through lengthy email chains became cumbersome within our matrix organization. Additionally, we recognized that inbound questions were a key source of customer feedback to inform our product roadmapping. We needed a way to systematically obtain and structure this information to generate actionable insights for our teams.

What key requirements did you have when you were evaluating vendors?

First was strong technical support. We wanted a vendor that provided a responsive and insightful technical support team, similar to the experiences we've had with Zendesk, who were active in configuring our environment and offering best practices.

We needed integration with our existing tech stack. It was essential for the vendor to support seamless integrations. We used Salesforce to manage customer opportunities and Productboard for prioritizing product development, and we really needed bidirectional flow of information.

And we wanted to build a comprehensive knowledge center. Our goal was to establish a robust knowledge base, and we found Zendesk Guide valuable, which was a tool that let us link documentation directly within Zendesk Support. And the guide needed to allow customization options to create a professional appearance, particularly as this could be a customer's initial encounter with our company.

Were there other vendors that you also evaluated while you were making this decision?

We considered Help Scout, but we had some reservations about the level of support we'd receive during implementation. Our organization is divided into two segments: the electronic health record (EHR) side and the research side. The EHR segment was already utilizing Zendesk, which presented beneficial contracting synergies.

How did you find the onboarding and setup process for Zendesk?

They have an excellent knowledge center for frequently asked questions. My role involved creating the template for the guide, designing the necessary ticket forms, and determining their influence on our reporting insights. The initial setup was quite straightforward. The challenge, not unique to Zendesk, was coordinating with our internal teams to decide the most relevant data for their reports.

What were the different use cases you used Zendesk for?

We utilize Zendesk for three primary functions. The first is managing customer inquiries through tickets. This process includes intake, triaging, assigning tickets to team members for responses, and tracking interactions within Zendesk.

Our second application of Zendesk is as an information hub. It serves as an internal and external knowledge base containing materials such as webinar content and data methodologies. It's an essential resource for onboarding users and providing assistance as they engage with our product.

And we leverage Zendesk for product roadmapping. By categorizing inbound questions and feedback into themes or product areas, it becomes a valuable tool for identifying which products or features are garnering the most attention and should be prioritized in our development plans.

How do those use cases map to different features of Zendesk?

Zendesk Support aids in triaging questions and allows for direct external responses from the ticketing system. However, there have been challenges with formatting, particularly when including elements like graphs, which may necessitate additional steps, such as moving content into an email. Its integration with Salesforce is smooth, with the ability to prepopulate fields.

Zendesk Guide, the knowledge center feature, offers predefined templates for easy setup. But customization can be a hurdle for non-technical users without coding skills or support.

The AI chatbot feature within Zendesk can be limited in handling complex technical inquiries, particularly those relevant to health tech SaaS companies. It performs well with simpler customer service scenarios but struggles with specialized queries, like those involving real-world data analysis in the pharmaceutical industry.

Regarding data security, Zendesk worked with us to delineate what level of Protected Health Information (PHI) was permissible within their system. While we ended up deciding that patient data should not reside in Zendesk, they demonstrated an understanding of the stringent requirements for healthcare companies.

What do you see as the strengths and weaknesses of Zendesk overall?

Zendesk's strengths lie in its community engagement and customer support. They foster a robust community through events like Zendesk conferences that allow users to network and share best practices. This level of engagement is mirrored in their friendly and responsive customer support.

On the downside, Zendesk doesn't emphasize design much, which is evident in the lack of prebuilt features and guides as well as formatting issues. While not considered a top priority for us compared to other aspects of the product, it's an area with room for improvement.

How did you find the overall usability and UI?

There were some frustrating aspects that seemed unavoidable, such as having to copy some things into emails that wouldn't display properly in Zendesk, but we decided to accept those limitations. And the process for requesting new features or fixes wasn't very clear.

Did you find Zendesk to be relatively stable and bug free?

It was pretty reliable.

How was the integration and development process?

The integration process with a Google data visualization tool was facilitated by using their API. For Salesforce, the integration was automatic and pretty seamless, without the need for direct API management. However, the integration with Productboard presented some challenges. Productboard and Zendesk have different functionalities, which led to instances of duplicate features. While the integration was implemented well, it ultimately wasn't as beneficial as anticipated.

How did you feel about account management and support?

I had a positive experience working with the support team; they were helpful and collaborated with us effectively. We felt the admin fees for working with the account management team were on the expensive side. Additionally, the need to rotate personnel during design sprints was challenging, although this issue was likely more related to the pricing structure than the management itself.

Do you feel like you made the correct decision in moving forward with Zendesk?

Yes, I think it was the right decision. No product is perfect, but its ease of integration and the out-of-the box features met our needs within our desired time frame.

Do you see any areas of growth for Zendesk?

They could expand in design and visualization for its support tool, offering more customization options for support managers handling customer responses.

Do you have any advice for folks who are in a similar role and currently deciding on this type of tool?

You need to be clear about the product's capabilities and limitations. Zendesk can facilitate support and provide product insights, yet it may not entirely eliminate the need for email exchanges due to certain design drawbacks, nor will it replace functionalities offered by Productboard. Ensure you understand what the tool is designed to solve and what gaps it might leave.