# Empower Support Teams to Deliver Exceptional Customer Service


Zoho CRM Plus

# About this Solutions Guide

This solutions guide is meant to help support teams use customer relationship management and customer service functions in Zoho CRM Plus, with the ultimate goal of offering exceptional service to their customer.

## Target Audience

Customer service and support agents

## Overview

Customers judge your business based on how well you handle customer complaints and issues. Businesses, specifically those that follow a subscription model, focus in providing efficient customer service in order to achieve sustainable growth. They need to be even more customer focused, redefine ways to interact with customers, and create a seamless experience across all channels of engagement. Businesses also need to understand customers' needs and pain points better, and offer personalized service. To accomplish this, they use customer relationship management tools to manage all prospect and customer interactions, and versatile customer service tools to offer personalized service.

With CRM and customer service, businesses can establish strategic processes to improve customer retention rates, reduce churn, and increase revenue growth. They can meet diverse customer expectations, establish long-term relationships, increase productivity, and retain their customers.

> *Customers communicate with you through different channels. They expect you to provide them with more choices. So be available when they need your help. Have a personalized approach. Be more responsive. Make them feel like you care for them, and you'll win their loyalty.*

# Facts on Customer Relationship Management and Customer Service

Businesses today use cloud-based CRM solutions, and this market is expected to witness tremendous growth in 2018. Some key facts to support this are given below.

In the next four years,

**CRM application software will become the largest software market**

in the world.

Gartner

By the end

**2018, 62% of CRM software will be**

cloud-based.

Forbes

CRM applications

**Will allow easy integration with other solutions**

businesses already use.

nextiva

Most CRM solutions will use

**Artificial Intelligence (AI), to interpret data at the individual level and deliver what customers want.**

CRM will ensure that all data is available to you to respond.

nextiva

As more businesses adopt CRM solutions, the importance of providing stellar customer service to meet customers' expectations is becoming less of a luxury and more of a standard. And, with this, customers' perceptions are changing, as well. Some key statistical data that support this is given below.

7 out to 10 customers **will do business with you again if you resolve the** complaint in their favor.

CSM

82% say that **getting their issue resolved quickly is the number 1 factor** to a great customer experience.

AMEYO

Happy customers **who have their issues resolved will tell 4-6 people about** their positive experience.

CSM

With great customer service, **70% of consumers will be more loyal, 65% would recommend the company to others, 43% would use the product or service more frequently, and 40%** would spend more money.

walkme

> *Research on customer service indicates that if you resolve a customer's complaint, there's a 70% chance that they will do business with you again.*

We understand that for businesses to stay competitive, it is imperative to have both CRM and customer service tools working together to offer exceptional service.

Now that we've established how important the relationship between the two is, let's look at some key customer service challenges.

# Customer Service Challenges

You may have the right customer service management tool, but the support teams can still struggle to provide individualized service and an amazing customer experience for a number of reasons:

**1. Inability to get a complete view of the customer's profile**

Let's say your company has a large sales and support team distributed across different locations. Since the data is in different systems, and team members do not have access to each other's data, it becomes difficult to track the interactions each member has with customers or prospects. So the sales teams find it difficult to keep track of customers or prospects who have contacted the support team for help. They have no idea how customers feel about the product. Similarly, the support teams have no clue which leads are hot and which tickets they need to prioritize.

**2. Problem with prioritizing support tickets due to a huge volume of tickets**

When customers have an issue with a product or service, they communicate with you through different channels such as email, chat, phone call, and social media channels such as Facebook, Twitter, etc. Managing, prioritizing, and resolving a huge volume of support tickets received through different channels is a challenge for your support teams, not to mention completing that process in a timely manner.

**3. Delay in providing the right solutions to customer issues due to lack of maintenance of knowledge repository**

Sometimes your support teams find it difficult to address even the most common customer issues or provide the right solution to a customer issue because they do not maintain a repository for the most common issues related to your products or services. This leads to delay in resolving and closing the support tickets.

**4. Lack of collaboration between sales and support teams**

Collaboration between your sales and support teams is vital when you have a large amount of sales and support data. Your sales and support teams may miss vital information, leading to a lack of clarity on the customer support side and frustration on the customer's side. Let's say a prospective customer is evaluating your software and has issues in installing it. The customer approaches your sales rep for help. Unless the sales rep and the support agent collaboratively work in resolving the issue quickly, it is difficult for the sales rep to convince the customer to buy the product.

One way you can overcome these challenges is to **integrate customer relationship and customer service functions** to enable the sales and support teams to work collaboratively, improve communication, and create a unified and consistent customer experience.

By doing this, your sales and support teams get a complete view of the customer's profile and a history of all their past interactions. Support teams can provide solutions for multiple problems, resulting in easy, efficient ticket resolution. You can keep your sales and support data organized, have access to it at all times, and manage your customers' information effectively. Your sales and support teams can function more cohesively.

# What Zoho CRM Plus Offers

Zoho CRM Plus is a suite of business applications that enable your sales, marketing, and support teams to easily access each customer's history. With customer relationship management and customer support functions in CRM Plus, sales and support teams can keep customer information, issues, queries, and suggestions organized in one place, and have better visibility into customer's problems and needs. Streamline the way your business handles customer requests, improve customer satisfaction, and enhance customer loyalty.

*Zoho CRM Plus is an end-to-end customer engagement suite that allows you to automate every stage of the customer journey and provide a consistent customer experience throughout. With Zoho CRM Plus, improve operational efficiency, maintain customer satisfaction, and accelerate business growth.*

# How CRM Plus Helps Support Teams Deliver Exceptional Customer Service

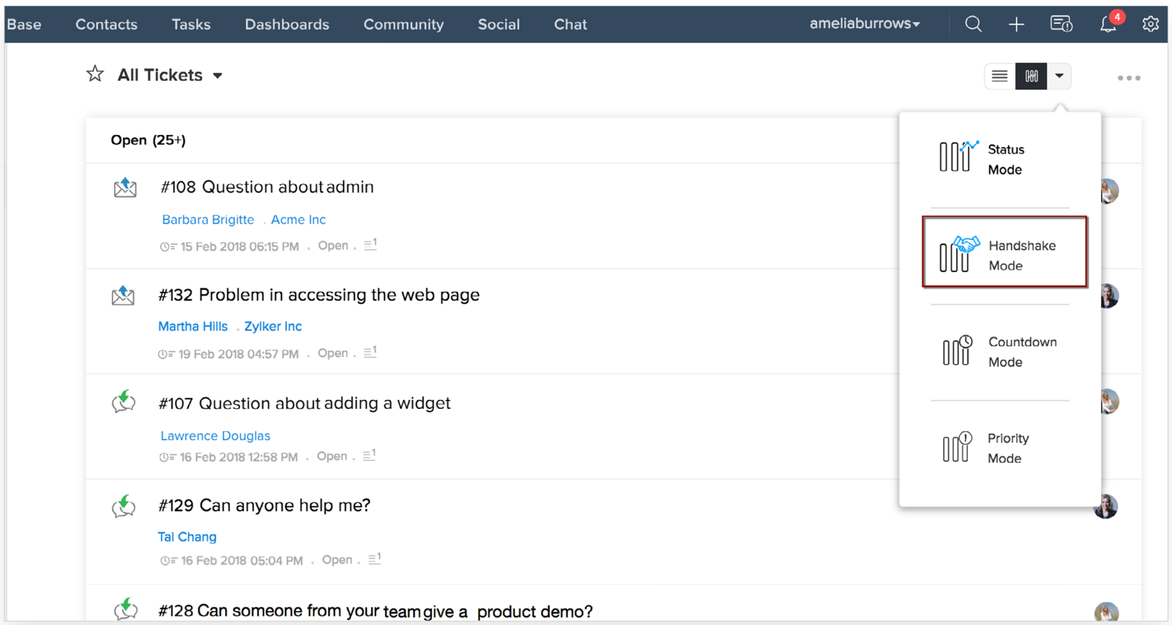
Let's say you work as a customer support agent at "Zylker, Inc." Martha Hills, a customer, has purchased your company's software and is now having a problem. She sends a request to the support team and the ticket is assigned to you. Now let's see how Zoho CRM Plus can help you resolve the issue while providing stellar customer service.

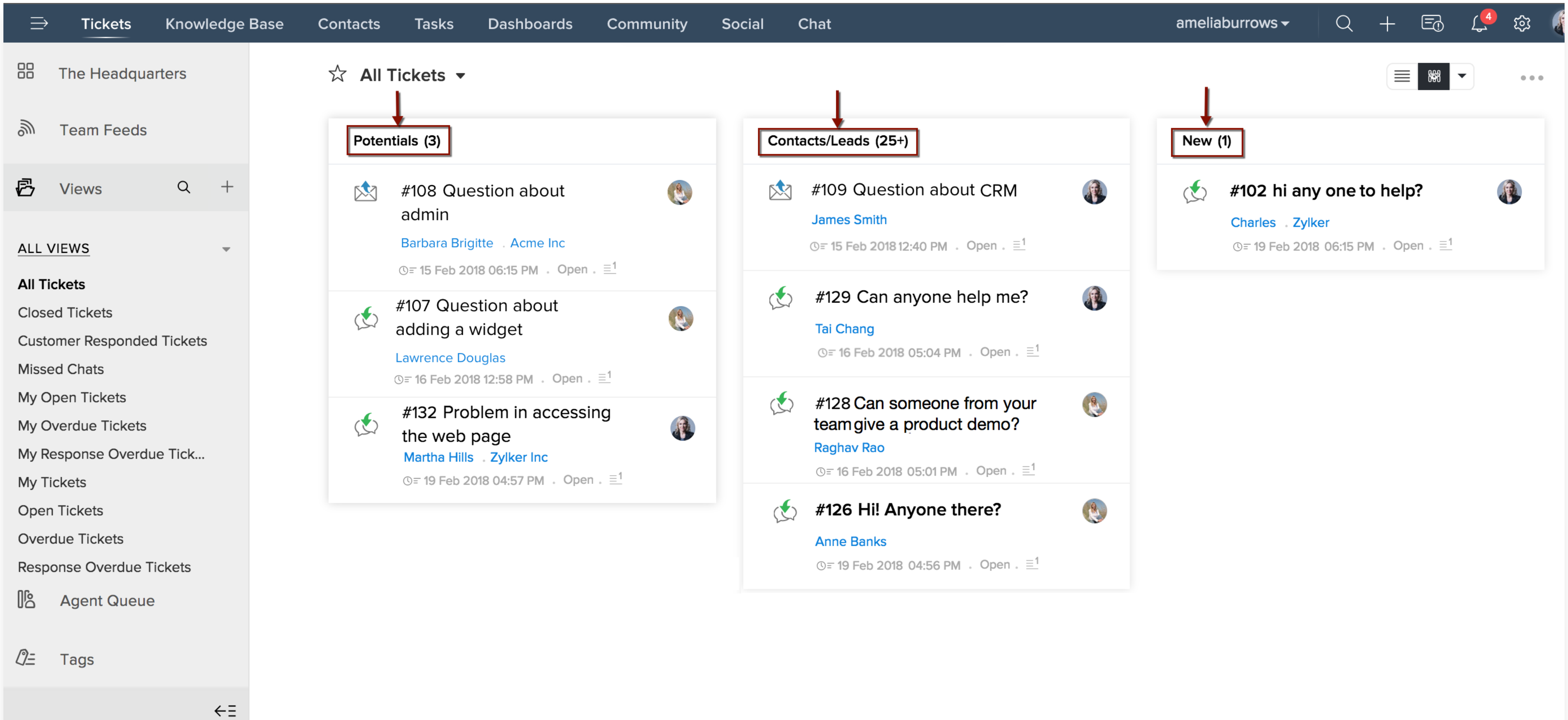
**With Zoho CRM Plus you can:**

## Prioritize support tickets received from customers, potentials, and contacts/leads from Zoho CRM and quickly address them.

Zoho Desk in CRM Plus intelligently helps you prioritize tickets received from customers, potentials, contacts, and leads from Zoho CRM; focus on the most important ones; and then resolve them quickly.

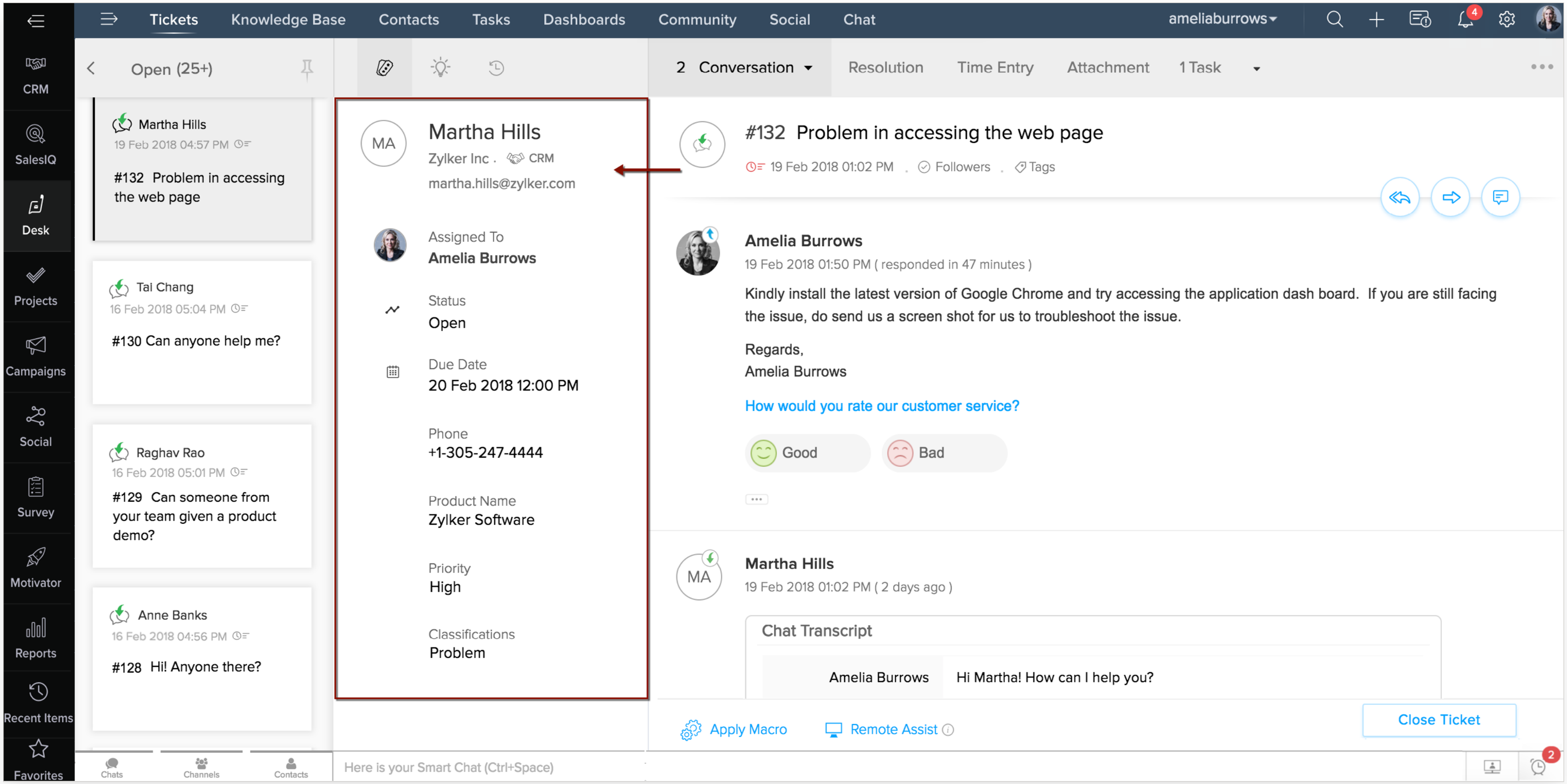
For example, let's say you've received a support ticket from a new lead requesting for a demo and from a customer for troubleshooting a feature. Zoho Desk intelligently prioritizes the tickets so that you can address your customer's request first. So in your case, you can prioritize Martha's support request and address her issue immediately.





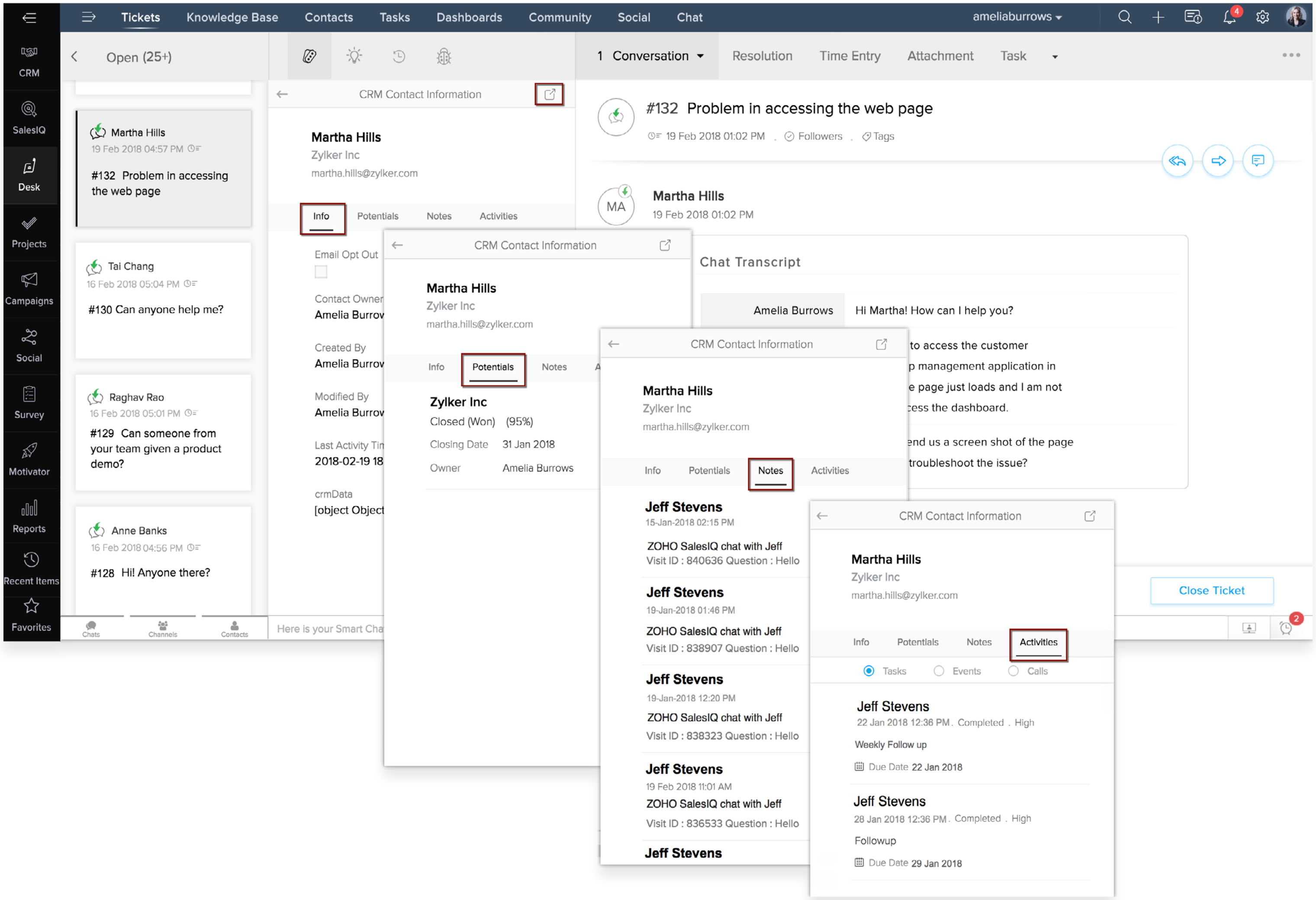

**Engage meaningfully with customers, potentials, leads, or contacts and offer personalized support by gathering all contextual information you need about them.**

With Zoho CRM Plus, you can view the complete CRM information of your customers, potentials, leads, or contacts inside Zoho Desk.




Access Martha's ticket and get all the contextual information about her such as her past support interactions and purchase history, view the deal amount associated, and track all interactions she's had with sales reps. You can view all the notes, tasks, and events associated with her, while contextually viewing appropriate solutions from the knowledge base, as well.

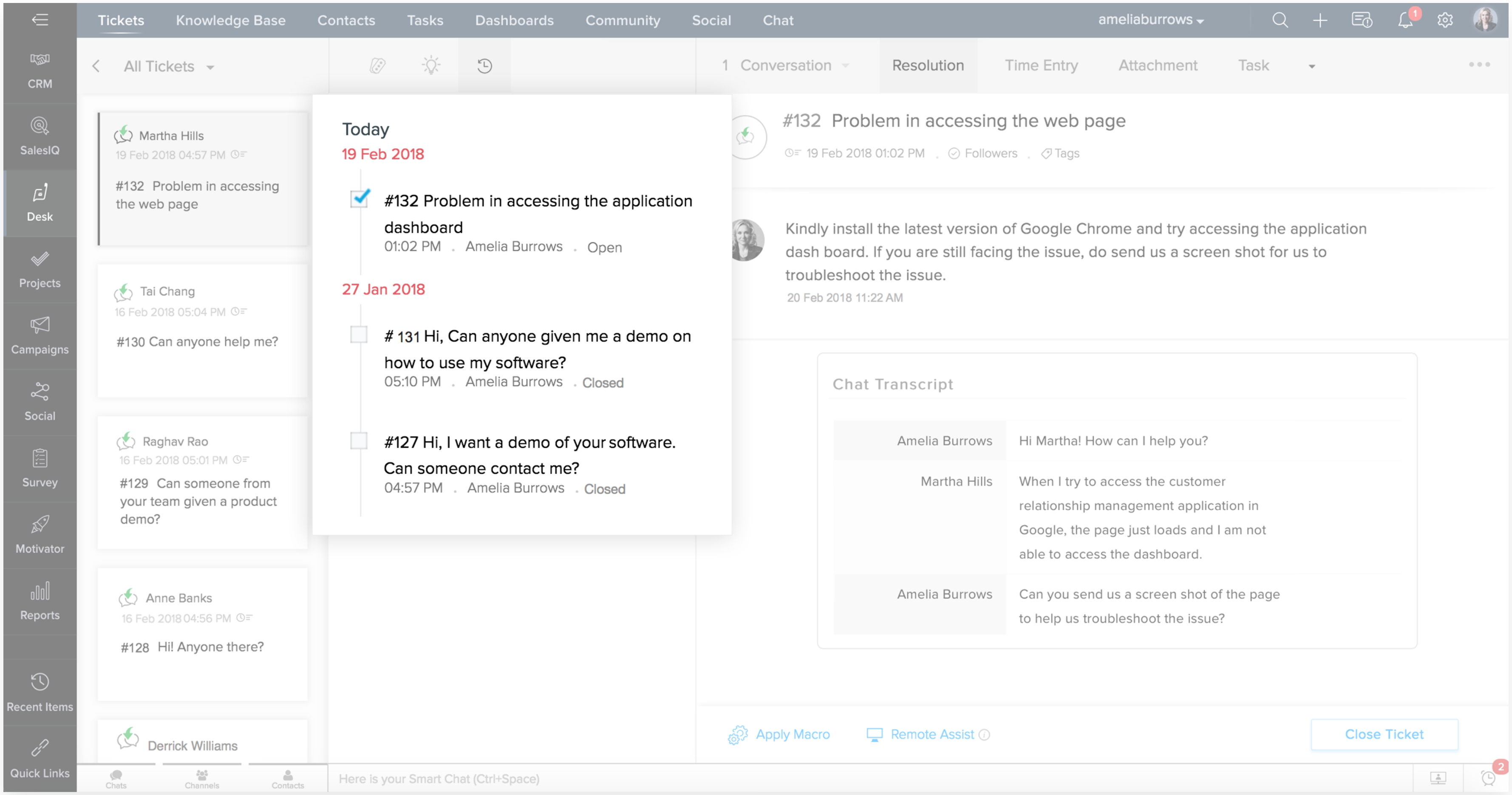
Now you have more context about Martha in Zoho Desk. This helps you have more meaningful conversations with her and provide more personalized support. For example, if Martha's issue requires technical help, you can move the ticket to the appropriate team, follow up with them, and keep your customer updated on the status of the issue all from inside Zoho Desk.




You can also click to view Martha's contact information from Zoho CRM, within Desk.

## Centrally view and manage all communications related to an issue or query.

Zoho CRM Plus enables you to track individual customers' request support history, analyze the issue, and assist them.



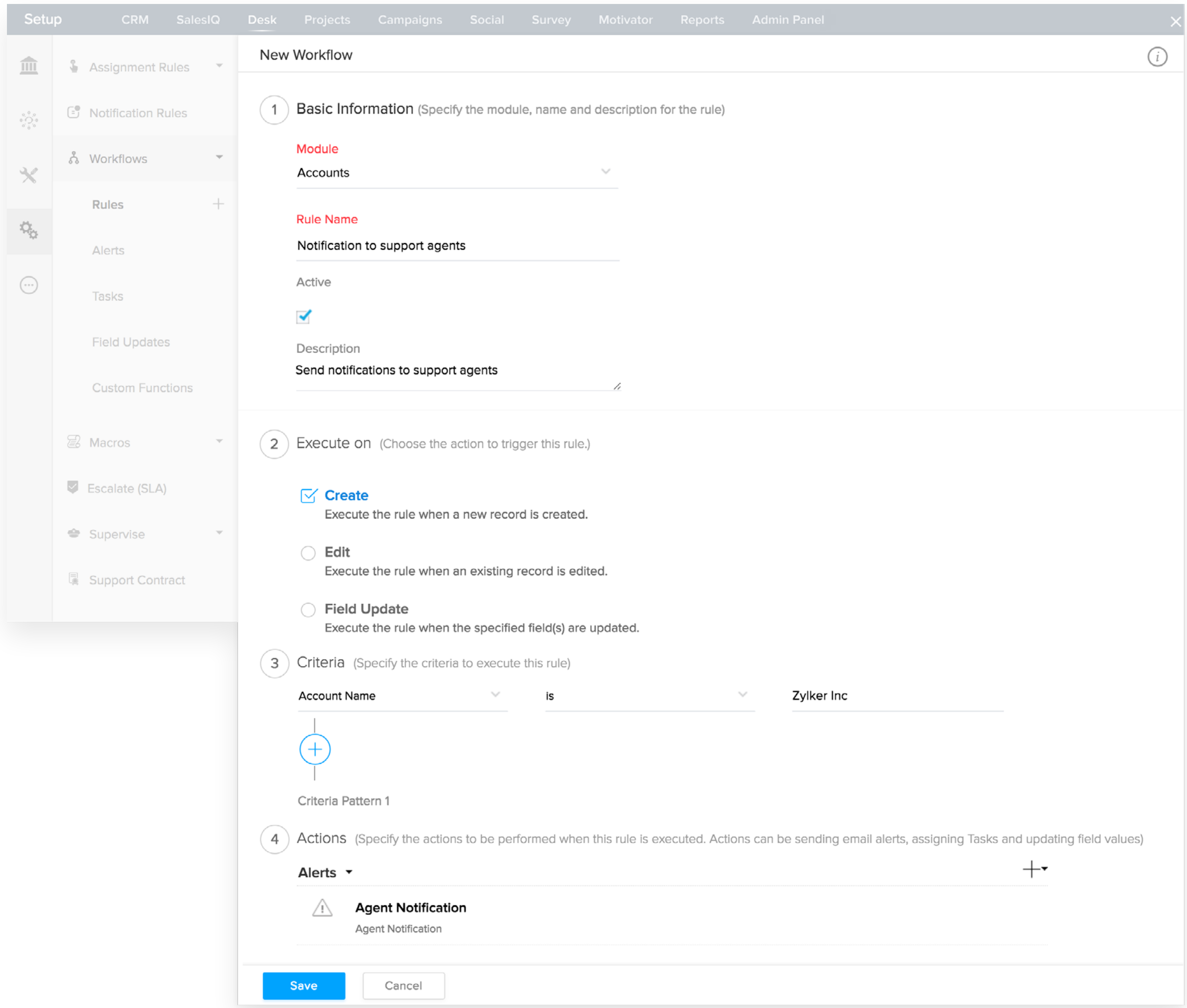

View Martha’s ticket history to find out whether she’s had previous interactions with support agents. This helps you understand her issue more fully. And if you know that your company has released a software patch that can help resolve her issue, you can email the details, assist her, and ensure that things are resolved.

With Zoho CRM Plus, you can add a comment to a ticket and notify the corresponding sales rep through SalesSignals when you have clarifications related to a potential. Similarly, if a salesperson who is also a light user in Zoho Desk receives request from a customer, they can tag support agents or add a comment to the ticket to notify agents to address the issue immediately.

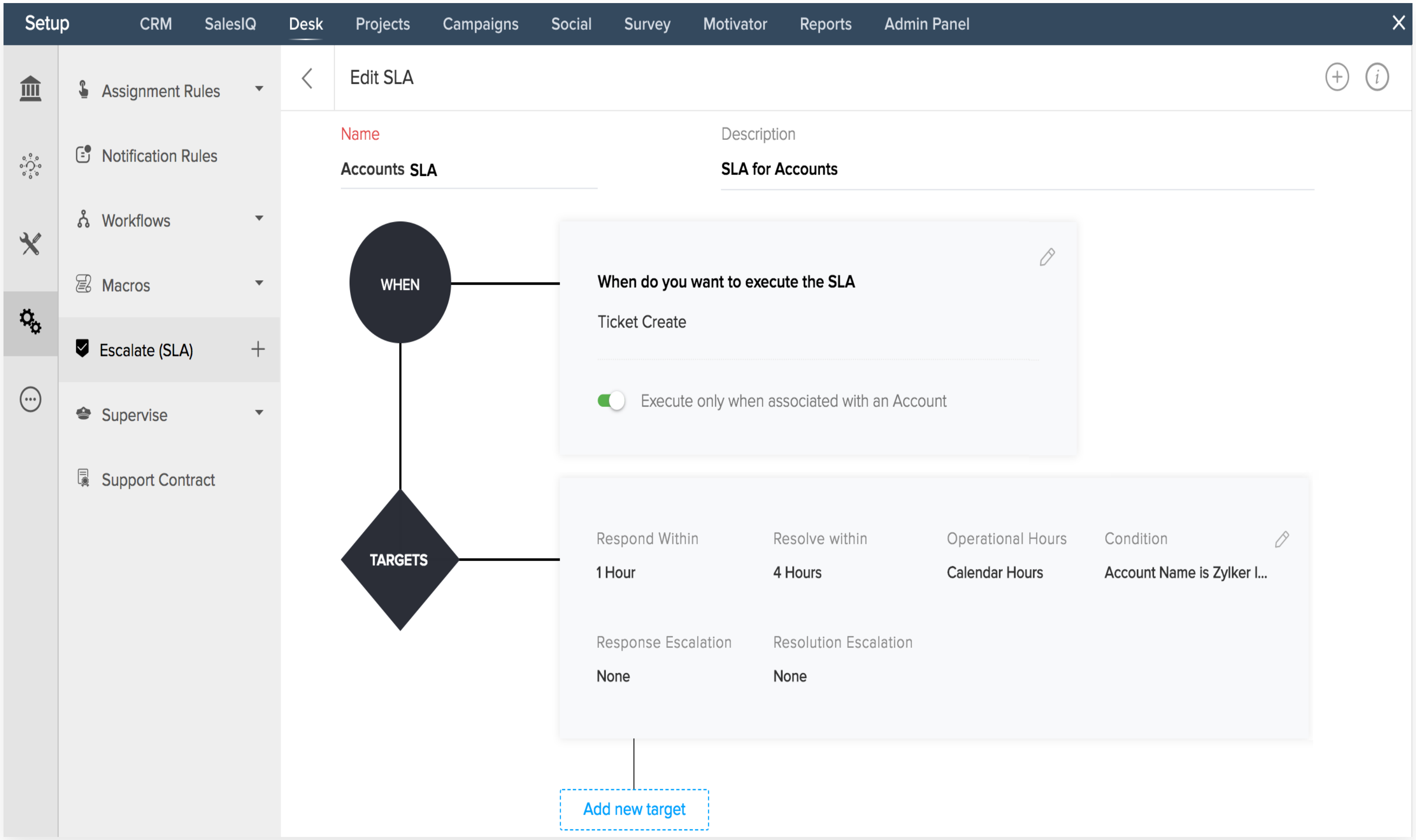
**Automatically categorize, prioritize, and route support tickets to agents or notify sales reps about customer issues through workflow rules and SLAs.**

With Zoho CRM Plus, create workflow rules and define SLAs to route high-priority support tickets to specific agents and resolve issues within the defined SLA. You can also send notifications to sales reps and keep them in the loop by creating workflow rules. Workflows can be created for emails, assigning tasks, or updating fields. SLAs can be created to set resolution time, response time, and for multiple escalations.

For example, create a workflow to notify a specific agent to attend all support requests received from the “Zylker, Inc” account.

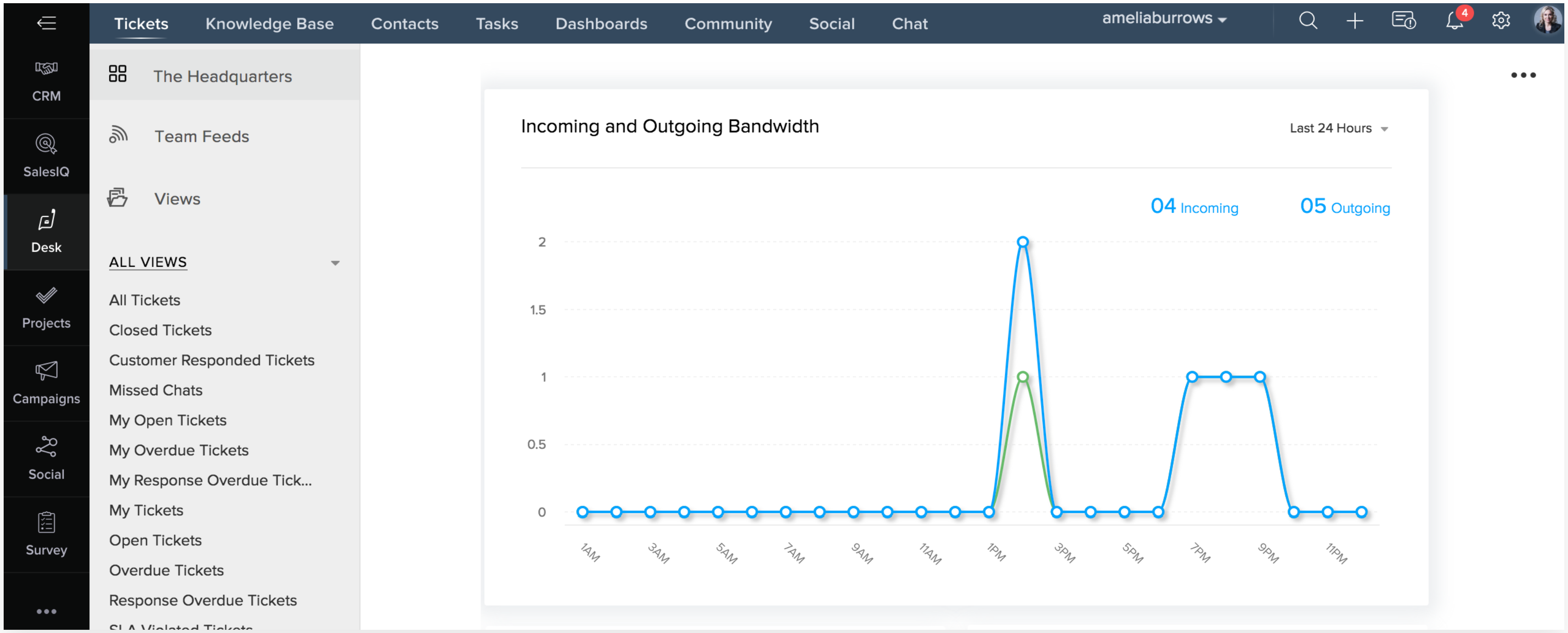



You can then define an SLA with a resolution time of four hours for this account, when receiving support requests from it. In this way, you can keep track of high priority tickets and resolve them.




## Get real-time insights into help desk activities.

Zoho Desk in Zoho CRM Plus enables you to get an overall picture of support activities in real time. Track incoming and outgoing responses; identify peak time for support activities; and track customer ratings, unassigned support tickets, and agents who are online or offline. You can also view up to 25 tickets that have had maximum email exchanges. Customized dashboards enable you to get live, actionable insights into support activities.

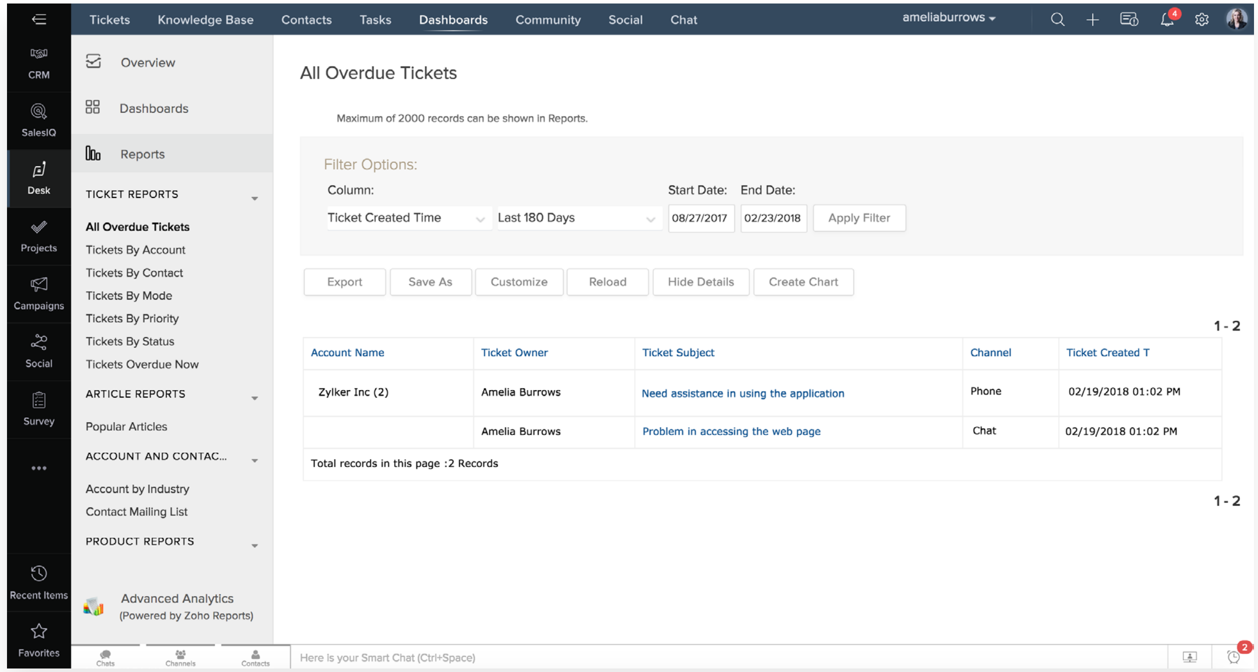

Tickets
Knowledge Base
Contacts
Tasks
Dashboards
Community
Social
Chat
ameliaburrows
CRM
SalesIQ
Desk
Projects
Campaigns
Social
Survey
The Headquarters
Team Feeds
Views
ALL VIEWS
All Tickets
Closed Tickets
Customer Responded Tickets
Missed Chats
My Open Tickets
My Overdue Tickets
My Response Overdue Tick...
My Tickets
Open Tickets
Overdue Tickets
Response Overdue Tickets
Incoming and Outgoing Bandwidth
Last 24 Hours
04 Incoming
05 Outgoing
2
1.5
1
0.5
0
1AM
3AM
5AM
7AM
9AM
11AM
1PM
3PM
5PM
7PM
9PM
11PM


Requests
Knowledge Base
Community
Chat
Contacts
Tasks
Dashboards
Social
ameliaburrows
Overview
Dashboards
Reports
Advanced Analytics
(Powered by Zoho Reports)
Current Request Stats
229 Open
16 Overdue
69 Unassigned
Last 7 days
300
250
200
150
100
50
0
16 Feb
17 Feb
18 Feb
19 Feb
20 Feb
21 Feb
22 Feb
414
New Requests (total)
382
Closed Requests (total)
14
Backlog (average)

## Analyze trends and patterns in customer service to offer better service to customers.

Generate reports in Desk from Zoho CRM Plus to see the trends and patterns of your support tickets. Analyze key metrics and suggest appropriate measures to provide better service to customers.

For example, create reports to view overdue tickets, accounts, contacts, ticket modes, priority-level, status, popular articles / solutions, and more, to analyze customer service trends and patterns.




Now you can see how CRM Plus provides all the contextual information you need to resolve Martha's issue. With Zoho CRM Plus, centrally organize and streamline customer service activities and keep track of requests and feedback. CRM Plus enables you to have a more personalized approach to customers and prospects, and provide the best service possible.

Businesses can improve collaboration between sales and customer service teams, identify common issues, and suggest areas of improvement. The sales and customer service teams can work together to retain more customers and ultimately increase a customer's lifetime value.

To learn more, go to [https://www.zoho.com/crm/crmplus/](https://www.zoho.com/crm/crmplus/)

**Additional Resources:**

Visit this **page** to learn more about how Zoho CRM integrates with Desk.

For more information about the Zoho Desk integration with Zoho CRM, click this **link** or visit this **website**.

Visit our **blog** page to learn how to use Zoho Desk's features.

To learn more about agent performance analytics, click **here**.

**Send your feedback to support@zohocrmplus.com to help us improve further.**