THE ULTIMATE GUIDE TO

Customer Support

By The Zapier Team
The Ultimate Guide to Customer Support

Everything you need to give your customers the best possible support

Zapier

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Explaining the same things over and over again is annoying at best. Yet it’s an important thing to do—something that’s critical to your business’ success. As long as you have customers, you’ll always have someone with a question to answer, a problem to solve, a bug they need fixed.

That’s why you need to learn how to do customer support well.

Customer Support doesn’t have to be a terrible, repetitive job. It can be the best way for your team to learn about your customers’ needs, a crash course into every feature and problem in your tools, and one of the few ways to guarantee your customers are happy.

These benefits and more have kept customer support one of our most important focuses as Zapier has grown. In this eBook, you’ll learn what we’ve discovered about customer support—along with ideas from the support teams at Intercom, Trello, HubSpot, and more—with tips to help you offer the customer support possible.

With roundups of the best apps and tools for customer support, ideas on how to automate tedious parts of support, tips on documenting your products well, and guides for getting out of the stickiest customer support situations, it’s the guide you need to ace customer support from day one.

**Who Is This Guide For?**

Everyone does support, whether they want to or not. If you’ve ever answered anyone’s question about anything relating to your job, you’ve done support. And at Zapier, we think everyone should do real customer support, to learn from the issues that come up and use that knowledge to do better work.
So whether you’re starting a new company, have never answered a support ticket in your life, or are a customer support industry veteran, we think there’s something in this guide for you.
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How to Do Great Customer Support

Including:

• An Intro to Customer Support
• All Hands Support: Why Everyone—Even Executives—Should Spend Time in Customer Service
• The 9 Help Desk Metrics that Should Guide Your Customer Support
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Chapter 1: An Intro to Customer Support

Customer support used to be easy. Not that the questions and problems were simple to solve, but at least you could be sure every customer who needed help would walk into your store—as that was the only place they’d expect support.

Then came the postal service, telegram, phone, email, live chat, social media, and before long there were more ways a customer could get in touch than you could count. You can’t afford to just ignore them, either. Even if you don’t officially offer social support, customers will still Tweet their problems and expect you to reply.

So what does customer support mean in the 21st century, and how can you effectively manage it all?
Chapter 1: An Intro to Customer Support

The Basics of Customer Support

Customer support isn’t a magical spell, a special bag of tricks only the gifted few can wield. Whether you’re a 18th century blacksmith or a 21st century codesmith, customer support is still just answering your customers’ questions and solving their problems. The more things change, the more they stay the same.

It sounds all new and modern, but customer support had been around as long as there have been companies and customers. Even modern things like store loyalty cards have been around since 1793.

What’s new is how customer support is done. In the 1700’s, the only way a customer could get support would be to walk into your store. By the early 1900’s, customers could call a company to get support—and by the 1960’s, companies started building call centers to handle the loads of calls. Then came email and live chat customer support in the 1990’s, social media support in the 2000’s, and in-app support in the 2010’s.
Today, it’s hard to keep up with the dozens of ways customers could get in touch with you. There’s bound to be more options in the future, not less. At the same time, customer support is crucially important for your business—perhaps more than ever before.

It’s the personal interactions with your brand that people remember most, making those first impressions even more crucial. Mess up that first support conversation, and you may never get another chance with that customer—and you may end up with a terrible Yelp or App Store review that scares away future customers.

**How to Do Customer Support**

“Answer Questions, solve problems, and make people happy.”

No, really. That’s all there is to customer support.

Step back in time to a General Store in Victorian England. A customer purchases a bucket, discovers it leaks, then travels back into town to tell the store owner their problem. A smart store owner will either repair or replace the bucket.

Problem solved. The customer’s problem was fixed, and the store owner earned a bit of goodwill. Next time the customer needs something (perhaps a rope to tie on the bucket), odds are they’ll go back to the helpful store.

Whether you’re selling apps or apples, buckets or bridges, customer support is essentially the same. Sooner or later, people are guaranteed to have problems with your product—that’s just how things go. They’ll also need to be taught out how to use the product and get the most out of it.

Either way, they’ll ask for help. That’s your chance to answer their questions, solve their problems, and make them happy.
It’s tough. People are usually grumpy when things go wrong, and they don’t like being told there’s no solution (as you won’t be able to fix every problem). But you’ll do your best, you’ll earn the trust and appreciation of those you can help—and most people will understand if you try hard to help and fail, anyhow.

You’ll need to know everything you can about your products and customers, to be able to solve people’s problems. You’ll have to be willing to say yes to their requests, learn how to say no when you can’t do something, and find ways to help customers help themselves so you’re not answering questions all day. And you’ll need to be patient enough to not blow up at the hundredth person to ask the same question in a row.

You’ll get it. It’ll become second nature after a while.

**Where to Do Customer Support**

So that’s it, answering questions. But where do you answer them? Your customers won’t wait to walk into your store and ask questions about a leaky bucket today. They’ll Tweet, email, call, and generally make sure you hear about their problems any way they want.

You’ve got to be ready.

Here’s the places you should focus your customer service efforts most:
Common wisdom says that stores are dead, traditional retail is dying, and you’re best to sell online. Yet Apple proved them wrong, turning their Apple Stores into some of the highest value retail space in the world. Sure, they sold must-have gadgets, but so did their website and countless other retailers.

What made Apple Stores stand apart was their customer service. When your iPod broke, you’d go to an Apple Store, talk to someone at the Genius Bar, and usually walk away with a fixed or replaced device. You’d be happy, and far more likely to buy an Apple product again.

Retail can be an annoying experience, filled with long lines and grumpy staff. Or, it can be an amazing experience, one that attracts people to see your well laid out store and get help from your friendly staff. It’s customer service done well that makes the difference.
Email is one of the best customer support tools. Nearly everyone on the internet has an email address, and it only takes a minute to add a contact form to your website.

Then, you can reply to customers emails anytime you want. A customer in Spain can email from their phone at noon, and you can reply at noon in San Francisco from your desk, or on a flight to Tokyo from your tray table. It may not be as real-time as a phone call or chat, and it definitely isn’t as personal as an in-person support session, but it’s the one support channel that likely applies to every business.

But it can still be overwhelming. Your support inbox will quickly start overflowing, and sharing a Gmail account for support doesn’t work that well. That’s why you’ll need a great customer support app to help manage the flow—and speed up your replies with prewritten messages.
Social and Chat

Twitter may not be the most popular social network, but it is most popular for one thing: support. Almost every company has a Twitter account, and it’s so easy to @mention them to ask for help or complain about a problem. And since Tweets are public, companies are often far quicker to respond and fix the problem, before you complain about it to your followers.

Facebook Pages are equally good places to express frustration in public, as are private messages in apps like Messenger, LINE, and WhatsApp. Then there’s live chat, with tantalizing real-time support.

Customers want it all, and it’s harder than ever to not do support on social networks. So treat it like a shorter email, and help fix people’s problems. The good news is, if you do it well, they just might turn around and Tweet about how great your support is.
Phone

We may use our phones for apps more than calls, but phone support is still important. It’s often the only way to get support from larger companies—and in smaller companies, it’s a way to stand out from everyone else’s email-powered support.

Phone support takes the same skills as in-person support: a calm voice, and a willingness to listen and explain. And sometimes, that’s the only way to fix the thorniest problems.

And More

Will you need to snap videos in Snapchat to support your customers in the future, or will you be using Oculus Rift to remotely show people how to fix something? Who knows. One thing seems certain: there will always be new ways to communicate, and every new communications tool can be used for support.

The good news is, the same skills work everywhere. If you’re great at solving problems and answering questions in email, you’ll figure it out when you need to do that in the next new app. You’ll still answer questions, solve problems, and make people happy. It’s still
customer support.

## Do Less Customer Support with Automation

With all those messages coming in, you’ll need to find ways to cut down the stress and get support messages answered faster. But support automation is known for being terrible, the stuff of auto-replies to emails and “Thank you for your patience” recordings.

It doesn’t have to be. Teams around the world use pre-written replies, keyboard shortcuts, and app integration tools like Zapier to reply to messages quicker, share more helpful information in less time, and make sure no Tweet gets left behind. You can automate your support, and have more time to actually spend time with customers and fix the most urgent problems.

All it takes is breaking down your most common support tickets, figuring out recurring themes, and finding ways to solve those problems quicker—perhaps with documentation or a pre-written email. Then, look at the tickets you’re overlooking and taking longer to reply to, and see what can speed them up—perhaps a Zapier integration that posts them to your team chat.

It’ll take a bit of time to setup, but will save you far more over time.
Customer support matters—enough that you should likely have your whole team do support, at least sometimes. Before we dive further into the tips, tricks, and apps to do support better, in the next chapter we’ll look at how Zapier and many other companies do full-team support, and why you should give that a try.

Written by Zapier Marketer Matthew Guay.

Image Credits: Store images via Wikimedia.
Good customer support matters. Great customer support sets you apart. It’s not a growth hack or a hush-hush marketing scheme; it’s common sense. People like to be treated like people.

At Zapier, we believe that the best way to help people is to put everyone on support. Around here, we call it “all hands support,” which means that every person on the team—no matter the job title—spends some portion of their day, week, or month talking directly to customers and solving problems for them.

It’s not a crazy idea, either. Many of the fastest growing companies do all hands support. When I asked my Twitter followers who is doing it, a surprising (to me) number of hands shot up. Teams like Stripe, StatusPage.io, Olark, Basecamp, Slack, Customer.io, New Relic and Wistia are all committed to an all hands approach.
Chapter Two: All Hands Support: Why Everyone—Even Executives—Should Spend Time in Customer Service

So what have these companies figured out that compels them to pull engineers, executives, marketers, and more off their day-to-day tasks to spend time on support?

The Benefits of All Hands Support

Effective all hands support focuses on making life better for your customers. But it can also cause a shift in how you and your team think about and build your company.

1. Customers get Better Service

That’s not to say the front-line customer support team can’t solve problems for customers. But certain problems require special expertise. For example, when something is broken, being able to talk directly to an engineer about the problem typically motivates the engineer to fix the problem quicker than they would otherwise.
Like David Cancel, CEO and Co-founder of Drift, told me in a Twitter exchange:

“Doing all company support gets engineers to solve customer problems faster. They are hearing about the problem first-hand, they can empathize with the customer. Those same engineers would be skeptical if they heard about these problems second-hand. Then the customer is blown away that they are talking to someone who actually can solve their problem.”

David isn’t the only one to notice this happening. At StatusPages they realized that when an engineer sees a problem for the third time, they stop what they’re doing and fix the problem. That means fewer tickets about the issue in the future.

My favorite story of improving customer experience through all hands support comes from Ali Rayl of Slack. At a previous role, her team—including the engineers—provided phone support. The engineering team hated phone support. But because they were required to do it, the team fixed issues as soon as they cropped up, to ensure that the phone never rang again for that same problem.

At Zapier: When APIs change, it can cause Zaps to perform in odd ways. That means trouble for multiple customers at a time. With an engineer doing support, these customers have their issues fixed right away.

2. Your Team Learns Directly from Customers

Upon polling the 30-person Zapier team, by far the most beneficial part of everyone doing support is the opportunity to see the everyday problems that customers face. Rather than being shielded from frustrated customers, everyone on the team gets an unfiltered view of what customers think about your product—the good and the bad.
This makes roadmapping and other product decisions easier, because everyone on the team has a shared understanding of the most common problems users are running into. If you’re a designer, for example, you can learn which pages of your product confuse users the most, and implement corrections. Marketers, on the other hand, can find out what your customers worry about, and create content that alleviates those worries.

Martin Normark, co-founder of milage-tracking app 80, talks about how surprised he was when he first started doing customer support as an engineer. He quickly realized that the product wasn’t solving his customers’ problems. The support team was solving issues for customers using the product, but because he wasn’t doing support he was shielded from the true issues.

At Zapier: Many users were frustrated with Tasks that would fail due to API outages, which meant they had to manually replay Zaps. We learned through support interactions that it would be great to automatically run delayed tasks for users. So a few months back, we launched autoreplay.
3. Support Becomes Faster, Easier and Less Expensive

When everyone does support, smart people with diverse skills start to think about how to make the more redundant parts of answering tickets faster. As a result, engineers start building tools to turn three clicks into one click. And suddenly, finding a needle in a haystack becomes a cakewalk, because logging gets more granular.

Building internal tools for your support team pays dividends as the company grows. Since a full-time support person can handle twice as many customer issues, you can keep your customers happy with half the staff, saves the company tons of money in salaries and management overhead.

Olark saw this first hand. The number one benefit they saw from all hands support is that “when engineers do customer service they are much more likely to build good internal tools and make quick fixes because they experience real customer pain.”

At Zapier: We’ve built a Google Chrome extension on
top of our help desk that adds quick links to our admin page, Stripe (our payment processor), server logs, and Mailgun (our email service provider). Those quick links make it easy to access details about a specific user, so we can help them faster.

4. Your Team Touches the Whole Product

As companies grow, individuals become more specialized. A product engineer may only work on a particular feature or two. As a result, individuals become more detached from the rest of the team. But when you jump into the support queue, customers aren’t concerned about your area of expertise. Questions will come about every piece of the product. This forces you to learn a little bit about the whole product you build, and gives you a better understanding to how your specialty fits into the sum of the parts. And you get the added advantage of feeling less lost if a teammate goes on vacation, and you need to pitch in to help.

The Basecamp team noticed that because new hires were getting trained on all of their products through support, it helped them understand why some features were so critical.

And Basecamp isn’t the only company using support as a team education tool. Stripe has also found that support is a great way “to learn about the company, how everything works internally, and our customer’s needs.”

At Zapier: Frontend engineers rarely touch the APIs behind Zapier. But through support they often have to deal with these issues. That helps them understand how it works, which in turn helps them design flexible frontend for Zapier.
5. Support gets the Respect they Deserve

People who do support full time often get a bad rap. Our unpleasant experiences with airline companies and cable providers have conditioned us to think that support reps can do little beyond read from a script.

But when you’re doing support on a weekly basis, you realize it’s a tough and challenging career in its own right. Support reps often know more about the product than you do, and often have great ideas for where the product can be improved.

At Zapier: Prior to joining Zapier, many teammates viewed support as an entry level job. After having done support at Zapier, though, it’s not uncommon for the support team to become the first team you reach out to when building a new feature or when searching for some customer friendly language for a new marketing piece.

6. You Build Empathy into the Core of the Culture

When you end up on the giving side of customer support, you start to strengthen your empathy muscle. You realize how much effort you put in to building a product, and how discouraging it is to deal with customers who don’t quite appreciate the effort. You appreciate how often your customer support team goes to bat for you—day in and day out. And you sympathise with people and companies outside in your daily life a lot more often.

When you teach your team to be empathetic towards customers, you also teach them to be empathetic towards each other.

At Zapier: During 1-on-1s I’ll often ask how support shift is going. A common reply is how people often
think twice before losing their cool with another company’s support agent simply because they’ve been in that situation, too.

The Challenges of All Hands Support

Doing all hands support isn’t without its difficulties, though. Here’s how pulling the entire company into the support queue can complicate things.

1. It Can Make Hiring Harder

If a weekly support shift is tied to every job offer, some people will look elsewhere. Some engineers or product people don’t really want to spend time helping customers by answering tickets. And that’s ok. But if your company is committed to getting the benefits discussed from all hands support, then you need to be ok saying no to otherwise great candidates who might want to join your company.

2. It Wears People Out

Depending on how you set up all hands support, it can be tiring. For example, engineers at Zapier take a one week rotation doing support. And it’s pretty common for engineers to cite their support week as the most challenging and tiring week of work they do at Zapier.
To mitigate this, train non-support staff on how to do support effectively. Make sure they know all the tools and documentation they have at their disposal. And always provide backup. If support becomes too much of a grind, then your staff will become ineffective at it.

### 3. It Leaves People out of the Loop

When your team takes time out to do support, they aren’t spending time on their primary duties. This means other projects will slow and when they come back to those projects they might have to spend some time catching up.

To mitigate this, make sure your teams account for when teammates are doing their support shift. Also make sure to document and log what’s happening on the teammate’s primary duties, so he or she can stay in the loop by reading through meeting minutes or chat logs.

### 4. It Costs Time and Money

All hands support also requires a time and monetary investment. You need to pay for extra users in your help desk software, and
spend the time training everyone on the product and support tactics. This training doesn’t happen overnight, so plan on spending a decent amount of effort coaching teammates on support and the product.

To mitigate this, train your support staff and your non-support staff with the same techniques. This way, you save time by reusing a lot of your training resources, and you can refine them as you go.

5. It Can Lead to a Poor Customer Experience

Contrary to this chapter’s first point—that all hands support leads to better customer service—some organizations find the all team support creates a poor customer experience. This often happens when non-support staff isn’t trained to engage with customers, and makes mistakes that frustrate them further.

But it doesn’t need to be that way. Make sure you dedicate the time and training to get non-support staff to a level where you’re comfortable with having them engage with customers. Or, make sure you hire people who are already empathetic, which which means they’ll actively pursue a positive result for customers.
How to Set up All Hands Support

If you’re ready to give all hands support a try, here are some guidelines to setting it up.

First, there’s no cookie-cutter all hands support strategy. Some companies have engineers, designers, and marketers do support for one day a month. Others rotate engineers in for week-long shifts. The truth is, you’ll need to experiment to figure out what gets the most impact for your company.

Here’s what works at Zapier:

- Engineers take a weekly rotation, doing tier 2 technical support. With 10 engineers on the team, every 10th week you’ll be tasked with handling all of the technical tickets that are escalated by the core support team. Weekly shifts work best because they allow engineers to dig deep on issues and follow through on complex tickets.
• Non-support, non-engineering staff do a half-day of support every week. This consistency gives them the chance to become proficient at support. If we only did one day a quarter, it would be too infrequent a task for them to be good enough to help customers. With a weekly shift, you can also schedule the half days to fill in the blanks for when support is heavy.

No matter how you set up the rotation you’ll need to make sure to train your non-support staff on support. Up until recently, we haven’t done a great job at this, but here’s what we found works for training:

• **Document everything.** We document as much as possible in our knowledge base and in our internal wiki, Hackpad, to help our full-time support staff and our customers. As it turns out, this documentation is really helpful for non-support staff, too. Take the time to organize the documentation so it’s easier for non-support staff to dip their toes in the support waters.

• **Pair up.** When you’re just getting started with support, you’ll have a lot of questions. So for the first handful of sessions, pair each non-support teammate with a dedicated support person who can help them learn the ropes. This could be as hands-on as doing joint support together, or as simple as being available on your team chat app to answer questions when they come up.

Getting your whole team to join in on supporting your customers is a great idea, one that can help everyone get insight into how your customers think—and what they really need. But whether your whole team is doing support or you’re just relying on a dedicated support team, how will you know if your support efforts
are successful? In the next chapter, we’ll look at the metrics you should watch in customer support—the things that will show you if you’re actually doing a good job at support, and not just closing tickets to get them done.

Further Reading

Want to learn more about all hands support? Here are other great resources from teams that successfully bring their full team into support:

- Olark: Why we do All Hands Support at Olark
- Basecamp: Everyone on Support
- Wufoo: Kevin Hale on How to Design Software Users Love
- Help Scout: Whole Company Support
- Kayak: The Way I Work: Paul English of Kayak
- StatusPage.io: $2,300,000 to One (Or How We Support 1,650 Customers With Just One Rep)
- Stripe: What it’s like to work for Stripe
- Performable: Our Startup’s Secret Weapon
- Customer.io: How Customer.io Built a Whole Company Support Culture
- Slack: Scaling Support Operations and Several People Are Helping
- Wistia: All Hands Support
- New Relic: How to Support 5,000 Customers with No Support Staff

Want to learn more about Zapier’s remote work culture? Read our free eBook, “The Ultimate Guide to Remote Work.”
Written by Zapier CEO Wade Foster.
I love numbers. Perusing collections of statistics and gleaning insights from them is a favorite pastime of mine. Right up there with watching baseball, tinkering with media center software, and wondering how my dog can sleep 20 hours a day.

During my three years on the Zapier support team, I’ve come to rely on numbers to calculate the effectiveness of our work and where we need to prioritize. The stats we crunch help us understand how well we’re meeting the needs of our users, and show us where to look to fix existing and potential problems.

This insight into our customer support doesn’t come without question marks though. We can collect all sorts of data points—from tracking support ticket volume to reporting on topic trends—but it’s making our customers happy that is the ultimate goal. Admittedly, this goal is a nebulous concept, and getting insight into it is tricky. But through trial and error and new and old stats, we’re certain
we’re on the right track.

As you review help desk data in your own company or organization, hopefully what we’ve learned will aid how you put your stats to use. This chapter gives you an overview of some of most common support metrics used by customer service teams. It not only details the meaning of those numbers, what they represent and what they say about the quality of support users receive, but it reveals pitfalls that come with those metrics, too.

Support Metrics to Know

Volume

- Total Conversations
- Total Replies
- Total Volume by Hours or Working Hours

Response Time

- Average Response Time
- Time to First Response
- Response Time Bands

Happiness

- Net Promoter Score
- In-Signature Happiness ratings
Chapter Three: The 9 Help Desk Metrics that Should Guide Your Customer Support

Product Trends

- Label/Tag Data

Volume

Total Conversations

Total Conversations or Total Tickets (depending on your help desk app) is the count of all new support requests that come in for a given timeframe. Each new inquiry, including its ensuing replies, count as one total conversation. Depending on the app you use for support, Conversations might also be called Tickets, or Cases.

The Good

Total Conversations helps give you a sense for the entirety of support. Tracking this over time can help understand when to hire someone new for the support team, and to give a macro-level view of support trends. Larger increases over time might mean a combination of several factors. Some of them are good, like user base growth; others aren’t so good, like an increase in problems or bugs in the product.
Chapter Three: The 9 Help Desk Metrics that Should Guide Your Customer Support

The Bad

Total Conversations can be a noisy metric depending on how you use your help desk. Between items that don’t need to be replied to (like auto-responders) or emails that weren’t meant for your support team (like mailing list emails), it can make that count less reliable.

At Zapier, for example, we funnel all Twitter mentions into our support inbox, even those that don’t require any action, and each one counts as a conversation. Since Tweets are inflating our numbers, we need to take Total Conversations with a grain of salt.

**Total Replies**

![Image of Total Replies](image)

Total Replies counts every reply sent in a given timeframe. Unlike Total Conversations, which will ignore how many replies happen in a given thread, Total Replies adds up each time a message gets sent to the user.

The Good

Total Replies helps you get a sense of how much effort your support team is putting in. While Total Conversations is misleading if you have many or few replies in each conversation, Total Replies captures that volume with more consistency. The stability of Total
Replies is one of the reasons that we made the decision to prioritize replies over conversations at Zapier.

The Bad

Total Replies doesn’t capture a support team’s efficiency. If you’re consistently taking five replies to answer questions that could be answered in three, Total Replies will be high even though users are getting a worse experience.

Total Volume by Hours or Working Hours

Total Volume can be sliced up into time intervals, which helps you measure your support team’s workload during a specific period. Segmenting your volume metric of choice (Total Conversations or Total Replies) by time of day helps you better understand the peaks and valleys of your volume.

The Good

Understanding volume by time of day can help to optimize scheduling in a support team, ensuring customers are getting helped without over-staffing.

The Bad

Depending on your support team’s goals, understanding volume by time of day or working hours may not be useful. For example,
if your team commits to strictly defined support hours, the exact details of when support requests come in outside those hours may not be as important.

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### Response Time

#### Average Response Time

Average Response Time is the average amount of time it takes to respond to support requests for a given timeframe, like days, weeks, or months. You normally see it represented as an hours and minutes value, e.g. “Average Response Time this week was 2 hours, 22 minutes.”

**The Good**

Average Response Time can be good for an at-a-glance view of how responsive a support team is to the volume it receives.

**The Bad**

Since you’re averaging your metrics, Average Response Time can be disproportionately impacted by outliers. For example, if five conversations come in, four are replied to in 15 minutes, and the fifth takes 24 hours, Average Response Time is 5 hours. That number
still has some use, but it’s not a great indicator of the team’s overall responsiveness.

**Time to First Response**

Time to First Response is how long it takes the support team to reply to the initial support request. No replies beyond the first one count towards this metric.

**The Good**

Time to first response can be useful to understand whether or not users are getting prompt initial responses. Since this is the point of first contact, ensuring the user gets a timely reply is vital.

**The Bad**

Much like Average Response Time, outliers can distort the value for Time to First Response. Even worse, making Time to First Response an important metric can potentially incentivize the wrong behavior. From “We got your email!” auto-responders to hasty “We’re looking into the problem!” emails, Time to First Response can be optimized without truly helping users.
Response Time Bands show the percentage of support volume answered within a specified time range. For example, 50% of emails are answered within one hour, or 99% of emails are answered within two days.

The Good

Response Time Bands help to best encapsulate the support experience for all users, since those bands will not be distorted by a small number of outliers or exceptions. You can also track movement through those bands to see if improvement in one is simply borrowing from a neighbor or making a large difference for that group of users. At Zapier, the three big bands we track are ‘Immediate Replies’ (less than 1 hour), ‘Same-Day Replies’ (less than 6 hours) and ‘Within 24-hour Replies’ (less than 24 hours).

For an example, let’s say 30% of users get replies within 1 hour, 80% get replies within 5 hours, and 95% of users get replies within 24 hours at a hypothetical company. If that 30% number goes up, seeing how much those other bands are impacted can help to understand if
those new “1 hour reply users” were formerly those getting a reply within 5 hours, within 24 hours, or even more than 24 hours.

**The Bad**

Like with Total Replies, a fast but inefficient support team might be providing a lesser experience to users than indicated by Response Time Bands. On the other hand, if your team has defined support hours that are clearly communicated to users, Response Time Bands may understate the quality of care users are receiving if those bands include off-hours in the calculations.

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**Happiness**

**Net Promoter Score**
Net Promoter Score (NPS) is a survey where a user is asked to answer questions on a 1-10 scale. Often, it’s given after a support experience is ended; sometimes days later.

**The Good**

NPS can give a support team both granular indicators of how users are feeling, and aggregate info on how all users rate the support they received.

**The Bad**

Some users might associate NPS surveys with past experiences, where filling in that survey went unacknowledged and therefore didn’t matter. As a result, those users might not be answering as honestly as they would otherwise. Similarly, designing a survey for the proper questions (both in content and length) can be a difficult undertaking. (If you need guidance, see our [guide to survey design](#).)

**Related:** [Why NPS matters in customer support](#)

### In-Signature Happiness Ratings

Instead of the more detailed NPS, the option to rate the support received can be included in each reply. This is often a shorter/smaller
survey. For example, at Zapier we include a simple “How did I do?” question with three options:

1. Yay
2. OK
3. Boo

The Good

Placing a Happiness Rating in your email signature encourages more immediate, visceral feedback. Since customers can rate each reply—not just the conversation on the whole—there’s likely to be more data collected, as well as the opportunity to improve the user’s experience by understanding how they feel before the interaction is over.

The Bad

While immediate, visceral feedback can help understand a user’s emotional state, it is not always actionable. Negative responses might be caused by frustration about functionality your product doesn’t (and won’t) have, rather than the quality of the support they received. Emily Chapman has written about how the Trello team avoids that pitfall, while using these ratings to connect with customers on a human level.
Chapter Three: The 9 Help Desk Metrics that Should Guide Your Customer Support

Product Trends

Label/Tag Data

<table>
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<tr>
<td>pre-signup</td>
<td>241</td>
<td>3%</td>
<td>0%</td>
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</table>

Many help desk apps offer the opportunity to tag conversations. If you have tags for different areas of your product or different categories of user problems, the count of conversations (or replies) for those tags can be viewed and compared.

The Good

By looking at tag data, a support team can better understand which areas of the product are causing the most support volume, or the most common problems a support team receives. This can help to prioritize product improvements, bug fixes, documentation additions or improvements, and inspire helpful videos and webinars.

The Bad

Depending on the product and the specific tags and labels being used, it can be difficult to get data that’s truly useful. If the tags and categories are too broad, the insights won’t be as actionable; if they’re too granular, it can become difficult to prioritize which areas to improve. If the tags themselves are not carefully maintained, that can open up a whole other set of issues, too, including where
similar but not identical tags exist and old tags aren’t removed, both causing confusion.

The Bottom Line

No matter which metrics you use to track support performance and measure the care your customers receive, there are pitfalls along the way. There’s no single number that tells you everything you need to know, so tracking several of the most relevant stats for your company can help give you the full picture without succumbing to information overload.

Now that you know how to measure your customer support success, in the next chapter let’s take a look at how you can improve each support message by learning from improv. You’ll never look at a customer support email the same way again.

Written by Zapier Support Lead Micah Bennett.

Image Credits: Numbers photo courtesy clarkmaxwell via Flickr.
Chapter Four: 4 Rules of Improv and How They Relate to Customer Support

One of the many memorable bits in Tina Fey’s book *Bossypants* is a section featuring several “Rules for Improvisation”. In it, she details four guiding principles that help make a good improv comedian.

When re-reading the list, which is also proudly posted at the famous Second City Theater in Chicago, I couldn’t help but be struck by how the principles also have relevance to how we help users in customer support. Though maybe that shouldn’t be surprising, as in support we’re often handed a situation and asked to react to what develops, much like a sketch comic.

Let’s take a look at Fey’s four rules and see how they apply to customer support:
Chapter Four: 4 Rules of Improv and How They Relate to Customer Support

Rule 1: Say Yes

The first rule of improvisation is AGREE. Always agree and SAY YES. When you’re improvising, this means you are required to agree with whatever your partner has created. So if we’re improvising and I say, “Freeze, I have a gun,” and you say, “That’s not a gun. It’s your finger. You’re pointing your finger at me,” our improvised scene has ground to a halt. But if I say, “Freeze, I have a gun!” and you say, “The gun I gave you for Christmas! You bastard!” then we have started a scene because we have AGREED that my finger is in fact a Christmas gun.

First things first, Saying Yes does not mean to never tell a user “no.” You need to be able to say no to a user, otherwise by trying to satisfy every potential user you end up underwhelming all of your users. Instead, Saying Yes means acknowledging what the other person is trying to communicate to you. You may tell them “no,” or “not now,” or move your product in another direction, but our replies need to show off that we understood their sentiment, frustration, and specific need.

So what does Saying Yes look like in practice? It means making
extra sure you’re getting the entirety of a user’s message when you think you’ve gotten the gist and are already formulating your reply (or reaching for the canned reply) before reading to the end of that message.

It means when you get feedback, fighting the defensive urge to dismiss the request as the user’s ignorance or misunderstanding, or even lack of fit for your product. That urge can be sneaky too. It can manifest itself as a reply that’s more concerned with why the user was wrong, rather than showing them that you understood their pain to begin with. There’s absolutely a place for the former, but it should always come after the latter has been expressed.

Rule 2: Say Yes AND

The second rule of improvisation is not only to say yes, but YES, AND. You are supposed to agree and then add something of your own. If I start a scene with “I can’t believe it’s so hot in here,” and you just say, “Yeah...” we’re kind of at a standstill. But if I say, “I can’t believe it’s so hot in here,” and you say, “What did you expect?
We’re in hell.” Or if I say, “I can’t believe it’s so hot in here,” and you say, “Yes, this can’t be good for the wax figures.” Or if I say, “I can’t believe it’s so hot in here,” and you say, “I told you we shouldn’t have crawled into this dog’s mouth,” now we’re getting somewhere.

While Saying Yes is about empathizing with the plight of users, Saying Yes AND is about getting users closer to solutions. Yes AND means answering the question AND going one step further. It’s about guiding the user to the next step in the process, or maybe pointing out a potential pitfall that may be around the corner once they’re able to move forward.

Like Fey says, if you just respond with “yeah...”, things aren’t moving forward because the onus is back on the user to figure things out. This extends support interactions further when they inevitably ask about those next steps, a worse experience for them and more work for support staff.

One of the best ways to go that extra step is in linking to documentation on those next steps to get a user to the end goal. Not only does it serve as a call to action so the user can get started on that right away, but it promotes self-service so that a user might discover future answers without needing to contact you.

However, Yes AND is also about making yourself available, inviting the user to continue the conversation if they have further trouble, or to reach out again if they have a different issue. Along with giving users a call to action or next step, doing so adds up to a powerful combination of empowering the user while not making them feel like they’re being pawned off to static documentation.
**Rule 3: Make Statements**

The next rule is MAKE STATEMENTS. This is a positive way of saying “Don’t ask questions all the time.” If we’re in a scene and I say, “Who are you? Where are we? What are we doing here? What’s in that box?” I’m putting pressure on you to come up with all the answers.

In other words: Whatever the problem, be part of the solution. Don’t just sit around raising questions and pointing out obstacles. We’ve all worked with that person. That person is a drag. It’s usually the same person around the office who says things like “There’s no calories in it if you eat it standing up!” and “I felt menaced when Terry raised her voice.”

Making Statements builds off similar logic for why we Say Yes AND. In customer support we often carefully choose our words to avoid absolute answers, lest our word guarantees blow up in our faces at a later time if our fix didn’t work, or if there was some confusion about wording that leads to a different interpretation.

This isn’t inherently bad, but Rule 3 reminds us that as the people responding to our users, we are the experts in the eyes of our users. If
we hem and haw and give noncommittal answers, then who could possibly know the real truth? If you aren’t as explicit as possible with your responses, it erodes trust in your support experience, and really your product as a whole So if you know the answer, say that clearly.

If you don’t know, say that, too, but also go the Say Yes AND route of telling the user you’ll find the answer or point to where they can find it themselves. Take these words that are used to “hedge” in replies:

- Probably
- Should
- Could
- Potentially
- Possibly

The more of these types of words show up in a single answer, the worse the message you’re communicating to the user.

**Rule 4: There Are No Mistakes**

THERE ARE NO MISTAKES, only opportunities. If I start a scene as what I think is very clearly a cop riding a bicycle, but you think I am a hamster in a hamster
wheel, guess what? Now I’m a hamster in a hamster wheel. I’m not going to stop everything to explain that it was really supposed to be a bike. Who knows? Maybe I’ll end up being a police hamster who’s been put on “hamster wheel” duty because I’m “too much of a loose cannon” in the field. In improv there are no mistakes, only beautiful happy accidents. And many of the world’s greatest discoveries have been by accident. I mean, look at the Reese’s Peanut Butter Cup or Botox.

Much like Rule 1, what this is not saying is “you can’t make mistakes.” Quite the opposite, in fact. Our humanity curses us to a lack of perfection. The product will fail, mistakes will be made, we’ll give people the wrong answers. Like Fey mentions though, this is also our greatest opportunity to make an impression on a user.

While the average company will try to paper over their mistakes with stilted and insincere responses, you can set yourself apart with your authenticity. Say you’re sorry like you would to a friend that’s there in the room with you, and give them a next step if at all possible (notice how this also encompasses Rules 1 and 2?).

Our instinct when we make mistakes is to minimize them as much as possible, and that shows in how the average company responds to those situations. After all, users would be angry if they knew we just screwed up, or lose trust in our reliability if we outright admitted our shortcomings. Right?

In practice though, this tends to work out just the opposite. Customers have been conditioned for years to expect non-apology apologies, and that only serves to further upset them as they feel they aren’t being heard or treated as if they don’t matter (hey, Rule 1!).

This leads to users that are irritated because of what they expect is coming in a response, and is the source of that great opportunity.
By demonstrating that you feel their pain point in your replies, users often flip to the other side entirely. We’ve seen numerous users write in with irritation about their Zapier experience become some of our biggest cheerleaders after our response demonstrated a concern for their individual needs. Our mistakes end up as big wins, and that’s why “there are no mistakes.”

Saying Yes and being direct can’t solve every customer support problem, though. In the next chapter, Len Markidan from the Groove team will walk you through 7 of the toughest customer support challenges you may face—and how you can overcome them gracefully.

Want a closer look at Zapier’s own customer support? Check out Support Recap: The Data that Drives Customer Support for Over 600,000 Product Use Cases on the Zapier blog.

Written by Zapier Support Lead Micah Bennett.
“I’ve never done customer service before, but it seems easy enough.”

That is— I wish I were making this up—an actual response to a question that I once asked a job candidate for a support position.

Needless to say, the applicant didn’t get an offer.

But beyond that, the experience made me realize something: Customer service is a job where there’s a massive difference between how difficult the job is and how difficult people who have never done the job before think it is.

That’s probably one of the reasons why far too many people think it’s okay to take their frustrations out on a support rep, whether they’re related to the interaction at hand or not.

It’s also one of the reasons that many people who get into customer service positions end up struggling with all of the unexpected challenges.
Today, I’m going to show you the seven most challenging scenarios faced by customer support agents, and tested techniques for handling each one.

1. Your Customer is Angry
2. There’s an Outage or Other Crisis
3. A Customer Requests a Discount You Can’t Give
4. A Customer Requests a Feature You Won’t Build
5. A Customer Asks a Question You Can’t Answer
6. You’re Overwhelmed by a Backlog of Tickets
7. You Have to Fire a Customer

1. Your Customer is Angry

If you’re in customer service, you will come across angry customers. Some are upset because they’re confused. Some are upset because of a mistake that you or your company might have made (whether it’s truly a mistake, or just a mistake in their eyes).

And some are simply having a bad day.

Getting defensive—or worse, trying to match the customer’s emotion—will only escalate the situation.

But fortunately, there’s a technique—developed and perfected by Disney, which hosts more than 135 million customers at its parks each year—designed to de-escalate interactions with angry customers and turn things around.

It’s called the H.E.A.R.D. technique, and the easy-to-remember acronym stands for:
When you’re faced with an angry customer, simply follow this checklist. Try and hear (or read) what the customer is truly upset about, without interrupting them. Express empathy and show them that you understand their frustration. Offer a heartfelt apology, even if you did nothing wrong. Do whatever it takes to resolve the issue, without being afraid to ask the customer what they feel the best resolution would be.

And when it’s over, work to figure out why the problem occurred in the first place, so you can ensure that it never gets repeated.
Chapter Five: How to Handle the 7 Toughest Customer Support Challenges

2. There’s an Outage or Other Crisis

Nothing is scarier than going through an epic business fail that causes you to risk losing the trust of your customers.

Server outages and security breaches can—and do—happen to anyone.

I always recommend that businesses have a crisis communication plan in place that outlines what the entire team should do in the event of an emergency, but when it comes to customer support, there are two key things to understand:

1. You’re sorry. You’re very, very sorry.

Even when you don’t know what’s happening yet, apologize to the customer for what they’re going through.

Beverly Engel, the author of The Power of Apology, explains why apologies are so effective when it comes to mending relationships:

- “A person who has been harmed feels emotional healing when he is acknowledged by the wrongdoer.
- When we receive an apology, we no longer perceive the wrongdoer as a personal threat.
- Apology helps us to move past our anger and prevents us from being stuck in the past.
- Apology opens the door to forgiveness by allowing us to have empathy for the wrongdoer.”

1. Over communicate.

Normally, we limit the number of emails we send to our customers; after all, we don’t want to annoy them.

But when things go awry, your customers want to know that you’re on top of things, and that there’s nothing in the world more important to you than fixing whatever is broken.
Chapter Five: How to Handle the 7 Toughest Customer Support Challenges

Constant updates via email, blog posts and social media—at least every 30 minutes until the issue is resolved—help to assure your customers that you’re working on the problem. Follow MailChimp’s lead: When they ran into crippling hardware issues at one of their data centers, they were in continuous communication with their customers:

**Update January 2 (10:28 pm):** We’ve replaced the hardware, and are currently reinstalling software and data. This is going to take several more hours to get fully operational. We’ll be working through the night to get it all running smoothly again. Sorry again to all affected users.

**Update January 3 (4:50 am):** Slight progress. 25% of affected user accounts have been restored and are back online. Still working on restoring backups of the remaining accounts.

**Update January 3 (7:47 am):** A little more progress. Another 25% of the accounts have been restored and are back online.

**Update January 3 (8:24 am):** The final batch of users have been brought back online. From our customers’ perspective, US1 is live again. Behind the scenes, we’re mopping up some messes, and soon I’ll post more details here on the blog.

Afterwards, publish a post-mortem or retrospective that outlines the problem, the steps you’re taking to prevent it in the future, and another sincere apology. Here’s a masterful example from Slack.

### 3. A Customer Requests a Discount You Can’t Give

Discounting can be a dangerous tactic.

On one hand, offering a discount might be the motivation that some potential customers need to finally buy from you.

But on the other hand, by offering discounts, you risk devaluing the perception of your brand...once you offer a discount, it becomes more difficult to get people to buy from you at full price again.
At Groove, we don’t offer discounts for that very reason. But nobody likes to hear the word “no.” So when a potential customer asks for a discount, don’t just turn them down. Instead, make it clear why you won’t offer a discount, and use it as an opportunity to reinforce the value of your product (and potentially convert the requester into a customer).

Len at Groove
Hey [Name],

First of all, thank you for trying Groove. It makes me happy that you’ve gotten value out of the app, and that you want to continue using it.

We’re a small business ourselves, so we can certainly appreciate wanting a price break :)

But with 2,000+ customers — including non-profits, schools and tiny startups — paying $15 per user per month, it wouldn’t be fair to offer discounts.

We’ve worked really hard to build the best product out there for small businesses to deliver awesome, personal customer support. We believe that Groove delivers more value than it costs and I’m confident that if you sign up to the paid plan, you’ll agree. Remember: you can cancel at any time, no strings attached.

I see that your trial is scheduled to end of September 20th. I’d love to do a quick call on Skype to walk you through some tips and tricks to help you get more value out of Groove. Does tomorrow at 11AM or 2PM EST work for you?

Either way, just hit “reply” and let me know.

Thanks again!

Best,
Len

4. A Customer Requests a Feature You Won’t Build

Teams have limited resources. And the best product teams approach their roadmaps with a laser focus.
So there’s a good chance that *most* feature requests won’t be built anytime in the foreseeable future.

But just like the prospect asking for a discount, nobody likes to hear “no.” And it’s even worse to say “no” to someone who’s already a paying customer.

Here, there are three techniques to remember:

1. **Keep your tone positive.** It *sets up* your message so it’s received effectively.
2. **Be personal.** Templated rejections make us all angry.
3. **Help the customer.** If there’s a workaround to get the functionality that the customer is asking for (or some other way you can make your product more valuable for them), show them.

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**Len at Groove**

Hey,

Thanks for the email. I really appreciate that you took the time to share your ideas.

I can certainly see how a BlackBerry app would be useful. With a small team and a big product roadmap, we have to pick new features based on the value they’ll add to the most users possible. At the moment, we won’t be able to make this one work.

With that said, some of our iPhone users prefer Groove’s mobile site to the native app. I’d love to hop on a quick call or Skype chat and walk you through how to get most out of it. Would Thursday at 10AM or 2PM work for you?

And I hope that if there’s anything else I can do for you, you won’t hesitate to let me know.

All the best,

Len
5. A Customer Asks a Question You Can’t Answer

I was recently booked on a flight that had a schedule change, and I wasn’t going to be able to make it to the airport in time for the new flight.

When I called the airline, a recording told me that the hold time was more than an hour, so I asked their Twitter team, via DM, for some help.

Here’s what they said:

Interestingly, a 2011 American Express survey asked people what the most annoying phrase in customer support was.

The winner?

“We’re unable to answer your question. Please call xxx-xxx-xxx to speak to a representative from xxx team.

Most Annoying Customer Service Phrase 2011

Sounds oddly similar to the response that I got, doesn’t it?

Good customer service isn’t always about knowing the right answer. Often, it’s about finding the right answer so that your customer doesn’t have to.

Instead of shutting your customer out, let them know that you’ll find the answer for them, and promise to follow up (so that they
don’t have to worry about it).

6. You’re Overwhelmed by a Backlog of Tickets

This is a common occurrence (especially on Monday mornings) for support teams who don’t have someone on duty 24/7.

Your support inbox is full, and there’s no way you’re going to be able to resolve all of these tickets fast. Many customers have been waiting for a response for a day or more.

While speed isn’t the most important thing in customer service, it does matter.

In one Forrester survey, 41% of customers reported that they expect a response to a customer support email within six hours, and almost all customers expected a response within 24 hours.

Note that a response doesn’t necessarily mean a resolution; the survey notes that many customers simply wanted to know that the business heard them and was working to resolve the issue.

So when you’re backlogged with support emails, focus on buying yourself more time by responding rather than resolving.

That doesn’t mean you should set up an autoresponder that tells customers that you’re backed up, though. Remember that AmEx survey about the most annoying phrases in customer support? Well, the second most annoying phrase was some variation of: “We’re
sorry, but we’re experiencing unusually heavy call volumes. You can hold or try back at another time.”

Instead, write a personal email that tells the customer that you (not “we”) will be taking care of them, and give them a hard deadline by which you’ll help them.

This way, your customers get timely responses, and you buy yourself more time to resolve their issues.

7. You Have to Fire a Customer

Your product isn’t right for everyone. And that’s okay.

Some people’s needs are better suited for a different solution. And some customers will never get what they need from your business. In both of these cases, your best course of action is to fire the customer.

But firing a customer can be daunting; how do you do it with grace and respect without making them angry?

Follow this simple four-step technique:

1. **Be positive and appreciative.** Thank the customer for giving you a chance.
2. **Re-frame the situation.** This is not about the customer’s failings as a customer, but about your failings as a business to meet their needs.
3. **Make the customer whole.** Offer a full or partial refund to compensate for their frustration.
4. **Apologize, and suggest an alternative.** Give the customer an option that would make them happy, even if it’s a competitor.

By going above and beyond, even when you’re firing a customer, you can still save the relationship, and your company’s reputation for excellent customer service.

**Customer Service Challenges Won’t Go Away**

As long as you’re working with customers every day, you’ll continue to face the myriad of challenges that support brings.

But by being prepared with the tools and techniques to turn those challenges into opportunities to build better relationships with your customers, you can make your life—and theirs—a lot easier.

Now that you’ve learned the basics of customer support, it’s time to find some tools to help you do customer support better. In the next chapter, we’ll look at **20 of the very best apps for supporting your customers.**

*Written by freelance writer and Groove marketer Len Markidan.*
The Best Tools for Customer Support

Including:

• The 20 Best Help Desk Apps and Knowledge Base Tools for Customer Support
• The Best Chat Apps for Customer Support
• Support Your Customers Better and Faster: Lessons from the Pros at Trello, HubSpot and Disqus
Chapter Six: The 20 Best Help Desk Apps and Knowledge Base Tools for Customer Support

If you have customers, you need customer support software. It’s that simple. You can only juggle so many emails and social media mentions on your own before you miss an important email and leave a customer high and dry.

There will always be difficult questions to answer and dissatisfied customers to appease, but at least managing your support requests can be simplified. That’s where customer support and help desk apps come in.

Designed to make it easy for you to better support your customers, these apps bring emails, tweets, chat messages and more into a customer support command center. There, you can sort through the messages, assign them to the correct team member, and make sure everyone gets a reply. These apps also help you build a knowledge base full of help documentation so your customers can find quick answers to common questions.
Here are over 20 of the best customer service apps that keep your support ticket queue under control and your sanity intact.

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- The Top 7 Features of Customer Support Apps
- Support Ticket Systems versus Multi-Channel Support Apps
- 10 Support Ticket Systems
- 11 Multi-Channel Support Apps
- Pick the Best Customer Support Tool for Your Team
- Add Custom Features to Your Customer Support Tool

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The Top 7 Features of Customer Support Apps

If you sell products online, or have an email newsletter, you likely know your customers’ email addresses already. So, when looking for the best customer support app, prioritize its email tools. That’s what we did when evaluating apps for this roundup—we made sure they were great for answering emails.

But what else do you need? If you’re picking out your first app for customer support, the choices can be overwhelming. When making your decision, consider these seven most popular customer support tools: team inbox, knowledge base, forum, social, chat, phone, and mobile support.
Chapter Six: The 20 Best Help Desk Apps and Knowledge Base Tools for Customer Support

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1. Team Inbox

A support inbox with emails in Groove

You could set up a Gmail account for your company, and answer every email there. That’d quickly get difficult to manage, though. Either one person would have to answer every email, or you’d have to share the account password with every employee—not the most secure option. Worse still, it’d be hard to tell which emails need replies, and you might accidentally answer an email while a coworker is sending a separate reply.

A team inbox simplifies all that. That’s what most customer support apps are at their core: just a team inbox. All of your messages are delivered to one place, where each member of your team can log in and see the emails. Click a message, and you’ll see previous messages to quickly understand what’s going on. And if someone else is replying—or the ticket closes the moment you open it—most team inboxes show you who’s replying and whether or not the ticket is still open. If you’re stumped by an issue, these tools let you assign tickets to other team members, too.

Team inboxes also let you bring in emails from multiple addresses, so you can answer your support@yourcompany.com and billing@yourcompany.com questions together. And team inbox apps often include advanced features, like canned replies, keyboard shortcuts, and other tricks and tools to improve your response time.
It’s an email inbox, designed to help you work more efficiently as a team.

2. Knowledge Base

Slack relies on Zendesk for its knowledge base, the Slack Help Center. A knowledge base lets companies answer common questions before they’re asked.

Much like the Help menu in your favorite programs, a knowledge base is where you publish documentation about pricing, features, services, frequent problems, and anything else you want to share about your app or business.

The knowledge base then lets you easily share help documentation online, where your customers can search through them and then get in touch if they still need assistance. And once you’ve answered support emails for a while, you’ll be able to identify other common problems you should address in your documentation.
3. Forum

Disqus employs a support forum to let customers help one another.

You can also crowdsource support with a forum, creating a platform where your customers can help each other. Much like the comments section on a website, or a community discussion site like Reddit, a forum is where your customers post questions and start discussions with anyone else.

Instead of sending your team a private email, a forum encourages your customer to publicly post. Then you or your customers can publicly reply with ideas and tips, and your team can moderate discussion to make sure the advice is accurate and the comment is friendly. These answered questions live on in public, where others can find the solutions without reaching out to your team.
4. Social

HappyFox pulls Twitter conversations into the team inbox.

When something is broken, the first action we take is to open Twitter or Facebook and either complain or ask for help. And when we love something new, we’re equally likely to share it online. That’s how your customers vent their frustrations and tell the world how much they like your company.

So join in. Support apps with social media integrations bring your Twitter mentions, Facebook messages and more right into your team inbox, so you can see those problems that otherwise might go unnoticed. Some even let you track keywords, so you can find people having trouble that perhaps forgot to mention your company by name.
5. Chat

Intercom lets you interact with customers via email or live chat.

Email can be a great way to answer questions, but it can also take a long time to actually close a support ticket as you wait for your customer to reply. Live chat is a quicker way to solve problems and answer questions, and it’s often included as an extra tool in more advanced customer support apps. Add the app’s support widget to your site, and customers can chat with your team in real-time.

You can’t be online all the time, though, so most chat apps also let users send you an email if no one’s available to talk. Then, inside the team inbox, chats and emails show up together for a full look at your customer interactions.
6. Phone

Freshdesk includes phone support that turns calls into tickets

What’s even quicker than live chat? Phone calls. Like live chat, phone calls will take extra effort from your team: someone must be online and available whenever your customers have problems, and will need to figure out solutions on the fly. But calls can also let you dig deeper into issues, since you can ask questions and get detailed replies instantly.

Many customer support apps that help you offer phone support integrate with voice-over-internet tools like Twilio, while others include their own phone services or just let you log phone calls you have as a text support message. Either way, you’ll get a record of phone conversations alongside your other support requests.
Chapter Six: The 20 Best Help Desk Apps and Knowledge Base Tools for Customer Support

7. Mobile App Support

HappyFox helps you offer mobile support with its HelpStack feature

When something breaks, your customers want help ASAP—they don’t want to search for the correct form to fill out and get support. Mobile support tools include code to add your documentation, live chat, and email support inside your mobile apps, so assistance is only a Help button away.

Since the help tool is inside the app, it’ll be easier to help customers as most mobile support tools also capture info about the user’s device, what part of the app they were using, and more. Instead of asking extra questions and waiting for more information, your team will be able to solve problems with the first reply.
Support Ticket Systems vs Multi-Channel Support Apps

If you want to cover it all, you need a customer support app with *everything*: a team inbox, social media monitoring, a knowledge base and forum, and more. A tool that offers this suite of features is called a multi-channel support app. Or, perhaps you like to keep things simple, and only want a team inbox to answer emails and a knowledge base to let customers help themselves. If so, you’d opt for a support ticket system—it’s not full-featured, but what it does, it does well.

To help you find the ideal tool for your needs—a simple support ticket system or a robust multi-channel support app—we’ve examined the top customer service options. We broke down each app’s features and pricing structure and grabbed a screenshot to give you a quick view of how to answer emails in that app. You’ll also find a link to an in-depth app profile after each summary, which contains a bullet list of features, more pricing details, and a link to a 500-word review in our Zapbook Reviews.

Without further ado, here’s an overview of the top 20 customer support apps—first, the simple support ticket systems, then the more feature-filled multi-channel support apps.
# Support Ticket Systems

<table>
<thead>
<tr>
<th>App</th>
<th>Best for:</th>
<th>Price</th>
<th>Supports:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Help Scout</td>
<td>a cost efficient, easy-to-use help system</td>
<td>Free for 3 users; $15/mo. per user</td>
<td>team inbox, knowledge base</td>
</tr>
<tr>
<td>Groove</td>
<td>simple support from your email inbox</td>
<td>Free for 2 users; $15/mo. per user</td>
<td>team inbox, knowledge base, social</td>
</tr>
<tr>
<td>Front</td>
<td>a team inbox for all your communications</td>
<td>Free for 5 users; from $12/mo. per user</td>
<td>team inbox, social, phone</td>
</tr>
<tr>
<td>osTicket</td>
<td>a self-hosted support system</td>
<td>Free self-hosted; $9/mo. per user hosted</td>
<td>team inbox, knowledge base</td>
</tr>
<tr>
<td>Tender</td>
<td>forum-style support</td>
<td>From $9/mo. for 1 user; $20/mo. per extra user</td>
<td>team inbox, knowledge base, forum</td>
</tr>
<tr>
<td>SupportBee</td>
<td>simply, full-team email support</td>
<td>From $49/mo. for unlimited users</td>
<td>team inbox</td>
</tr>
<tr>
<td>Mojo</td>
<td>timing replies and tracking happiness</td>
<td>Free for 3 users; from $29/mo. for 10 users</td>
<td>team inbox, knowledge base</td>
</tr>
<tr>
<td>Sirportly</td>
<td>real-language reports</td>
<td>£14.99/mo. per user (around $23/mo.)</td>
<td>team inbox, knowledge base, social</td>
</tr>
<tr>
<td>Snappy</td>
<td>a fast, Markdown-powered support inbox</td>
<td>$15/mo. per user</td>
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</tbody>
</table>
# Multi-Channel Support Apps

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<tbody>
<tr>
<td>Zendesk</td>
<td>support on any platform</td>
<td>$1/mo. for 3 users; from $25/mo. per user</td>
<td>team inbox, knowledge base, social, chat, phone, forum</td>
</tr>
<tr>
<td>Zoho Support</td>
<td>a free support center</td>
<td>Free for unlimited users; from $12/mo. per user for social and more</td>
<td>team inbox, knowledge base, forum, social, phone, chat</td>
</tr>
<tr>
<td>Freshdesk</td>
<td>prioritized SLA support in your apps</td>
<td>Free for 3 users; from $16/mo. per user</td>
<td>team inbox, knowledge base, social, chat, forum, mobile support</td>
</tr>
<tr>
<td>UserVoice</td>
<td>project management and support in one app</td>
<td>From $15/mo. per user</td>
<td>team inbox, knowledge base, mobile support, forum</td>
</tr>
<tr>
<td>Desk</td>
<td>Salesforce integration and tabbed interface</td>
<td>$3/mo. for 3 users; from $30/mo. per user</td>
<td>team inbox, knowledge base, social, chat, phone</td>
</tr>
<tr>
<td>Intercom</td>
<td>deeply filtering your communications</td>
<td>From $49/mo. for unlimited users and 250 support contacts</td>
<td>team inbox, knowledge base, social, chat</td>
</tr>
<tr>
<td>Kayako</td>
<td>support on all your devices</td>
<td>From $29/mo. per user</td>
<td>team inbox, knowledge base, chat, phone, mobile support, forum</td>
</tr>
<tr>
<td>HappyFox</td>
<td>tracking time spent on support tickets</td>
<td>From $19/mo. per user</td>
<td>team inbox, knowledge base, social, chat, phone, mobile support, forum</td>
</tr>
<tr>
<td>LiveAgent</td>
<td>a quick look at all interactions with a customer</td>
<td>From $19/mo. for 3 users; $9/mo. per extra user</td>
<td>team inbox, knowledge base, chat, social, forum</td>
</tr>
<tr>
<td>Reamaze</td>
<td>support inside your apps</td>
<td>$15/mo. per user</td>
<td>team inbox, knowledge base, chat, social, mobile support</td>
</tr>
<tr>
<td>Deskoro</td>
<td>simple social support</td>
<td>Free for 1 user; from $15/mo. per user</td>
<td>team inbox, knowledge base, social, chat</td>
</tr>
<tr>
<td>UserEcho</td>
<td>learning from users</td>
<td>$15/mo. per user</td>
<td>team inbox, knowledge base, chat, social, forum</td>
</tr>
</tbody>
</table>
The Best Ticket Support Systems

Would you prefer a simpler support tool, one that’s primarily focused on being a team inbox that makes it easy to respond to emails from your customers? These apps are the ones for you. They each include easy-to-use team inboxes that are focused on emails, typically along with a knowledge base tool to manage your documentation.

Then, if you want more—social network or chat app integration, perhaps—you can turn to their Zapier integrations to bring the messages you need into your team email inbox. It’s a great way to simplify your support, and get just the features you need.

Help Scout (team inbox, knowledge base)

for a cost efficient, easy-to-use help system

The majority of your support tickets are just emails, and Help Scout’s Gmail-style interface and keyboard shortcuts keep that in focus. You can have as many mailboxes as you need for support,
each with their own email address, then Help Scout can further organize each mailbox into folders and categories based on rules.

Dive into an email, and you’ll see a familiar sidebar with information about the customer where Help Scout pulls in social media information and previous conversations to give your emails a personal touch. Help Scout also offers your customers a quick poll at the bottom of your emails to ask how well your team did at support, and you can see your team’s productivity and happiness scores along with other metrics inside Help Scout. It’s a simple, easy-to-use support tool, with the power you need to quickly answer questions without feeling overwhelmed.

- **Help Scout Price**: Free for 3 users and 1 mailbox; $15/month per user for full features; $25/month extra for Docs and help center
- For a deeper look at Help Scout features and pricing plans, check out our Help Scout review.
- See Help Scout integrations on Zapier

**Grove (email, knowledge base, social)**

for simple support from your email inbox
A team inbox sounds like a great idea, but it’s still hard to not wish you could just answer all of your emails right from your personal email inbox. And you can. **Groove** gives you a full team inbox while still letting you work from your personal inbox if you’d like. New or assigned tickets can be auto-forwarded to your email account, where you can reply, re-assign the ticket, and change its status with simple commands at the bottom of your message.

Back on Groove, you’ll find a complete log of what everyone has accomplished, along with features like automation and saved common replies to speed up your work. There are also detailed reports in an easy to understand dashboard that’ll show your reply ratings, average replies and time spent, and more.

- **Groove Price**: Free for 2 users and basic email features; $15/month per user **Plus plan** for full features
- *For a deeper look at Groove features and pricing plans, check out our Groove review.*
- *See Groove integrations on Zapier*

**Front (team inbox, social, phone)**

*for a team inbox for all your communications*
You already know how to use your email inbox, so Front designed its team inbox to work as much like popular email apps as possible. You can monitor any of your team’s email inboxes, with a three-column design that shows accounts, a list of messages, and the message you’ve selected in one view. You can assign emails, snooze a message until later, add tags to find emails in the future, and add a comment to get more information from colleagues. It’s not just for support—but it works great for support or anything else where you need to work on the same inbox with your teammates.

Front’s team inboxes can work for more than email, too. It includes built-in Twitter and Facebook integrations that allow users to view mentions and messages and then reply right from Front. Or, you can connect it to your Twilio, Truly, or Intercom to add an inbox for SMS messages, phone calls, and chat messages. Each one lives in its own inbox, with the familiar email-style interface, for a simple way to reply to all of your messages in one app.

- **Front Price**: Free for 5 users and one inbox; from $12/month per user Team plan for 5 inboxes, canned responses, plugins, and automated rules
- **Zapier integration with Front** coming soon
**osTicket (team inbox, knowledge base)**

*for a self-hosted support system*

Want a free support tool that can run on your own servers? **osTicket** is the app for you. It’s an open source support tool that includes everything—you can answer support emails, assign tickets to other team members, create support forms, and write your help documentation all on your own server, for free. You can even tweak osTicket, by digging into its code or installing language packs and add-ons to employ extra features. And, you can set it up to send emails through a transactional email service to make sure your emails always get delivered.

osTicket includes some extra features, too. It locks tickets while you’re replying, so no one else can accidentally reply to the email at the same time. It also includes a tasks tool to let you create to-dos for others and make sure they don’t forget to reply to important messages. With these features and more, osTicket might be a great option for you even if you weren’t considering hosting your own support app.

- **osTicket Price**: Free open source edition to run on your own servers; from $9/month per user hosted edition
• You can use Zapier’s MySQL Integrations to connect osTicket to your other apps.

Another popular free self-hosted support system is HESK, which also includes IT asset management for a one-time fee.

Tender Support (team inbox, knowledge base, forum)

for forum-style support

Answering the same questions over and over gets tiring, and takes up time you could spend answering new questions or building your product. Tender Support simplifies things by defaulting to community forums, and treating your public and private messages the same. Whenever someone has a question about your product, Tender’s help form defaults to having them ask a public question. Once you answer it, any other customer can see the response and solve the problem without having to open a new support ticket.

Some questions still require a private message, so your support page will include an option to send the message in this manner. Tender
then automatically looks through your documentation and emails your customer a link to something that might answer their question. You can still answer on your own, but you’ll likely have far fewer issues you’ll have to solve.

- **Tender Support Price**: From $9/month [Starter plan](#) for basic support and 1 user; $20/month for each additional user.
- **For a deeper look at Tender Support features and pricing plans, check out our [Tender Support review](#).**
- **See [Tender Support integrations](#) on Zapier**

**SupportBee (team inbox)**

for simple, full-team email support

Most support apps charge per users, making it tough to decide how many people should help with support tickets. **SupportBee** simplifies things by charging a flat rate, no matter how many people are helping juggle support tickets. It’s an email-focused support app—without a help center—that gives you a centralized inbox for every email your team needs to handle. New emails flow into your
inbox and refresh automatically, so you’ll always be on top of the freshest tickets.

SupportBee is designed like an email app, with labels, HTML email rendering, and Gmail-style shortcuts. You can save snippets of text to quickly fill out important parts of email replies, mixing and matching snippets for each part of your reply instead of relying on full canned replies. With simple filtering to send tickets to the right team member, and SupportBee automatically suggesting snippets to use based on tags, you’ll answer support tickets faster than ever.

- **SupportBee Price**: From $49/month Startup plan for unlimited users and up to 1,000 tickets
- **For a deeper look at SupportBee features and pricing plans, check out our SupportBee review.**
- **See SupportBee integrations on Zapier**

**Mojo Helpdesk (team inbox, knowledge base)**

for timing replies and tracking happiness

Your customers’ happiness with your support team is likely linked to how fast you reply—and if you really solve their problems. **Mojo**
Helpdesk includes a number of features to help you solve every issue on time. You can customize your support form to make sure you gather enough information about each problem to solve it on your first try. Then, there’s built-in service level agreement (SLA) agreements, to help make sure you answer your support tickets as quickly as you’ve promised.

Timeliness goes beyond clearing the inbox—you’ll also want to make sure you’re getting faster at solving problems. Mojo Helpdesk includes a time tracking tool, so you can see how long each ticket takes and how much you’ve improved. It’ll even notice when you step away, pausing the timer and refreshing the inbox when you get back. Your customers can share their thoughts on your timeliness, as well, clicking a button at the bottom of your emails to let you know if they’re satisfied or not.

- **Mojo Helpdesk Price**: Free for up to 3 users; from $29/month Professional plan for 10 users with email support and knowledge base; $399/month unlimited plan available
- **For a deeper look at Mojo Helpdesk features and pricing plans, check out our Mojo Helpdesk review.**
- **See Mojo Helpdesk integrations on Zapier**

**Sirportly (team inbox, knowledge base, social)**

for real-language reports
It’s one thing to see a graph of your support traffic, but quite another to quickly find out that you’ve had 100 more emails today than on average. Sirportly makes it simple to find quick facts about your support queue, with its simple, real-language reports that tell “44 tickets were received today (that’s 4 more than normal)”, perhaps, instead of showing only a graph of your stats. You’ll know at a glance how fast your team’s responding, and who’s sending in the most questions today—or you can build custom queries to find out anything else you want.

Sirportly also makes it easy to manage all of your support, no matter how many different companies, teams, or products you need to support. You can add all of them to your account, separate support inboxes for different teams and needs, and use workflows to route tickets and automatically follow-up to help keep your support queue in check. It can even pull in customer data from your app, to make sure you’ll have the information you need to solve customer problems. Or, if you want, you can run Sirportly Enterprise on your own servers to keep your app and support in one place.

- **Sirportly Price**: £14.99/month per user for full features (around $23/month)
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- For a deeper look at Sirportly features and pricing plans, check out our Sirportly review.
- See Sirportly integrations on Zapier

Snappy (team inbox, knowledge base)

for a fast, Markdown-powered support inbox

It’s easy for support apps to become bloated with tools for a dozen different support-related tasks—but what if you want just a simple way to answer your customer’s questions? Snappy offers that with an impressively fast app that’s focused on emails, FAQs, and nothing else. You’ll start out at its dashboard, which shows a large preview of messages and the time since they were received—a reminder of how long your customers have been waiting. You can send a quick, Markdown-formatted reply there, or open the message for a full look at their email, previous requests, and more.

Finding the right email to focus on is simple with Snappy’s Lenses features, which are filters that help you find emails about specific topics, emails assigned to someone in particular, or customers have for too long been awaiting a reply. You can then make an easy-to-understand support center with Snappy’s FAQs, which require you
to think of everything as a question. And as you’re working, you can let your team know your status on the Wall, an internal social network just for your support team.

- **Snappy Price**: $15/month per user for full features
- *For a deeper look at Snappy features and pricing plans, check out our Snappy review.*
- *See Snappy integrations on Zapier*

Another promising simple support tool is the currently-in-beta **SupportYard**. It brings your team messages together in a simple interface, with search and tags to help you find the messages you need.

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**The Best Multi-Channel Support Apps**

Looking for a full-featured support app—one that can manage your support emails, social networking mentions, phone calls or text messages? Each of these apps goes far beyond the basics of handling support. They’re a bit more complicated and might take longer to get started using, but they also help manage every possible aspect of support you ever need—and more.

**Zendesk (team inbox, knowledge base, social, chat, phone, forum)**

*for support on any platform*
Today you need to offer support via email, Twitter, Facebook, and perhaps phone. Tomorrow, who knows which new social networks and communications tools will be most popular? Zendesk is ready either way. It’s designed to enable you to help your customers wherever they are, with support for tools to add chat, SMS, and much more—along with CRMs, forms, and other tools that can add extra data to your support tickets. If you ever need additional features, you can build your own Zendesk App or check back for a new one from their team.

Zendesk is also designed to help calm your support queues by letting customers help themselves. When someone wants to ask your team a question, they’ll first be shown your documentation, where Zendesk will show articles that might answer their questions. Only then will they be able to send you a message, helpfully cutting down on repetitive questions you’d otherwise have to field. They’ll also be able to help you know how well your support is doing, through a Net Promoter Score survey at the bottom of your messages.

- **Zendesk Price**: $1/month per user Starter plan for up to 3 users; from $25/month per user Regular plan for satisfaction surveys and communities
• For a deeper look at Zendesk features and pricing plans, check out our Zendesk review.
• See Zendesk integrations on Zapier

Zoho Support (team inbox, knowledge base, forum, social, phone, chat)

for a free support center

Zoho makes apps for everything: office files, CRM, accounting, and much more. Zoho Support follows in the grand tradition of the other Zoho apps, with a similar interface, one account that works with all of the Zoho apps, and tight integration with the other Zoho tools. And, most incredibly, it lets you build a full support center for free.

Just by signing in with a Zoho account, you can set up a support center with email, documentation, and a user forum, and bring in as many of your teammates as you need to manage support. Then, if you want to add a social network integration, chat, phone support, or tie in Zoho CRM, you can upgrade to a paid account. It’s one of the cheapest ways to get your support center off the ground, without leaving behind any of the features you’d expect from a multi-channel support app.
• **Zoho Support Price**: Free for unlimited users for email and support forum; from $12/month per user **Professional plan** for social and phone support, and **Zoho CRM integration**

**Freshdesk (team inbox, knowledge base, social, chat, forum, mobile support)**

for prioritized SLA support in your apps

Figuring out where to focus your support attention is difficult. Should you answer the emails that just came in, reply to a Tweet from last night, or see if any Facebook messages came in? **Freshdesk** makes it easy to decide, with built-in service level agreement (SLA) policies that make sure you prioritize support the way you intend. Indicate which support channels or user levels should get the fastest support, and Freshdesk marks tickets as increasingly important based on how long they’ve waited.

When your customer receives your reply, it will be in the format they expect. Instead of turning everything into an email message, Freshdesk lets you record phone calls, reply to Facebook messages...
directly in a dedicated tab on your Facebook page, and push notifications to your mobile app users when you respond. You can even offer real-time support with Freshdesk’s live chat widget on your site.

- **Freshdesk Price**: Free for up to 3 users; from $16/month per user **Blossom plan** for basic support features
- **For a deeper look at Freshdesk features and pricing plans**, check out our [Freshdesk review](#).
- **See Freshdesk integrations on Zapier**

### UserVoice (team inbox, knowledge base, mobile support, forum)

for project management and support in one app

It started out as a tool for customers to request and vote on new features and improvements in their favorite products. Then it added customer support tools, so you can solve your users’ problems and listen to their ideas in one place. Today, **UserVoice** combines project management, customer support, and a forum all in one app, so you can use feedback to direct your development.
Customers can send in new public ideas or private messages, and your team can answer them all from one combined dashboard. There’s even integrations with internet phone systems, CRMs, social networks and more to get as many of your support requests in one place as possible. UserVoice watches everything going on and combines it with your public feature requests to build a project management queue for your team. You’ll know exactly what to work on next—and how valuable it will be to your users—with UserVoice’s support data-based project management.

- **UserVoice Price:** From $15/month per user Standard plan for core support features; from $499/month Basic plan for project management features.
- **For a deeper look at UserVoice features and pricing plans,** check out our UserVoice review.
- **See UserVoice integrations on Zapier**

**Desk (team inbox, knowledge base, social, chat, phone)**

*for Salesforce integration and tabbed interface*
Ever need to switch between emails as you work out a solution—perhaps answering a simpler question while thinking over a hard one, or working on multiple similar tickets at the same time? Desk’s tabbed interface would be perfect for you. Open all the tickets you want to answer from the dashboard, then flip between each of them in tabs. It’s a quicker way to work on a short list of tickets.

Desk also makes sure you have the data you need at hand to help your customers out. As part of the Salesforce family of apps, Desk shows your CRM data alongside tickets if you’re a Salesforce user, and it logs support questions back to a contact’s profile in your CRM. You can also tap Salesforce’s reporting tools in Desk, allowing you to visualize your team’s performance and find areas to improve.

- **Desk Price**: $3/month **Starter plan** for 3 users; from $30/month per user **Standard plan** for basic support and knowledge base features

- **For a deeper look at Desk features and pricing plans, check out our Desk review.**

- **See Desk integrations on Zapier**
Intercom (team inbox, chat, social, chat) for deeply filtering your communications

Want to find support tickets from users who’ve purchased your product more than a year ago, and also used your trial before purchasing? A simple search won’t cut it, but Intercom’s detailed filters and customer profiles make it easy to find any ticket you want.

Intercom watches your customers’ interactions on your site and keeps track the pages they visit, when they started a trial, looked at a pricing page, or anything else. You can then reach out to customers with messages inside your app, chat with users to answer their questions before they make a purchase, then reply to their support emails later on—all from the same app.

Intercom’s support interface lets you jump between emails quickly, and reply in short, chat-style messages. On the right, you’ll see the contact’s full profile—including the last time they visited your site, the number of times they’ve used your app, and more. You can even
intergrate your support center into your mobile app with Intercom’s iOS and Android code, and respond directly in your app—even while you’re on the go. And at the same time, Intercom can send automated emails and other marketing messages to keep customers engaged and offer proactive support or tutorials.

• **Intercom Price:** Free to observe visitors on your site; From $49/month Support plan for unlimited users and up to 250 support contacts

• *For a deeper look at Intercom features and pricing plans, check out our Intercom review.*

• *See Intercom integrations on Zapier*

Looking for another customer support tool that either doubles as a CRM or has CRM features like Intercom? Interakt is a great option for an email marketing-focused CRM that also handles customer support. Streak, a CRM built inside Gmail, is another support and CRM tool. And even Salesforce includes a Service Cloud tool to answer support tickets inside its popular CRM.

**Kayako (team inbox, knowledge base, chat, phone)**

*for support on all your devices*
Web apps are great—they work on almost any browser, and don’t require any installation or downloads. But sometimes, it’s nice to have an app designed for your computer, and Kayako offers that for almost every device. It includes mobile apps for iOS, Android, Windows Phone, and Blackberry, along with desktop app for Windows PCs and Macs. You can answer support emails from the web and mobile apps, then take calls and field live chats from the desktop apps to make sure you never miss anything.

Kayako also includes an advanced support center that helps your customers solve more of their problems on their own. You can include documentation articles, tutorials, troubleshooting guides, and news all in your knowledge base. Whenever someone has a problem, Kayako searches through all of that before letting them send an email. Then, it pulls all of a customer’s chats, emails, billing, logs and more together whenever they get in touch, so you’ll know exactly how to solve their problems.

- **Kayako Price**: $29/month per user Case plan for email and basic features; from $49/month per user for live chat and calls
HappyFox (team inbox, knowledge base, social, chat, phone, mobile support, forum) for tracking time spent on support tickets

Wonder how much time your most difficult support tickets take to answer? Wonder no more. HappyFox include a time tracking tool right inside its team inbox, to see how long it takes to answer each email. You can then bill clients for priority support, or adjust your team’s goals based on the tracked time. Simpler tickets can be cleared out right from your support dashboard, without having to open a new page.

HappyFox also takes away another bit of guesswork you’d have with most support centers: how to migrate your data. It can import existing support tickets from Zendesk and Desk, and its reports let you export your HappyFox contacts, tickets and more in spreadsheet formats. Its mobile framework even accommodates other customer support apps, to keep you from feeling locked-in.

- HappyFox Price: From $19/month per user Popular plan for basic support features and up to 10 categories; $39/month per user for Mighty Plan with time tracking.
• For a deeper look at HappyFox features and pricing plans, check out our HappyFox review.
• See HappyFox integrations on Zapier

LiveAgent (team inbox, knowledge base, chat, social, forum)

for a quick look at all interactions with a customer

Answering support tickets well without knowing the full context is difficult at best. Something that seems to be a difficult question might be much easier to solve if you saw the customer’s previous interactions with rest of your team. LiveAgent makes this simple by pulling every interaction your team has with a customer into a continuous, chat-like thread. You’ll see their previous emails, chat sessions, and more—everything they’ve ever talked about with your team will be right there, to make solving today’s issue easier.

LiveAgent is focused on real-time support, with a live chat widget for your site and SLAs to ensure you provide on-time support to your best customers. But it also can help your team from burning out, by letting each support team member set their own schedule and keep new tickets from coming into their queue while out of
office. With each interaction in one place, it’ll be easier for others to pick up where you’ve left off, so you can step away and then jump back in ready to tackle brand-new tickets without leaving anyone waiting.

- **LiveAgent Price**: From $19/month **Ticket plan** for 3 users with email support ($9/month per extra agent); from $29/month for chat; from $450 self-hosted edition
- **For a deeper look at LiveAgent features and pricing plans, check out our LiveAgent review.**
- **See LiveAgent integrations on Zapier**

**Reamaze (team inbox, knowledge base, chat, social, mobile support)**

for support inside your apps

Email doesn’t have to be the quickest way for your customers to get their problems solved—**Reamaze** can help them get answers right inside your app. Build your help docs in Reamaze, then embed them into your website or app, right along with Reamaze’s chat widget. Whenever your customer gets in touch, you can see their account
inside your app, and know exactly what they’ve purchased or the problems they’ve had in the past. You can then help them with their orders and more, without ever having to ask for extra info.

Reamaze also lets you monitor an email address or social accounts for help messages, and brings everything together for you to answer in one place. But with your help built so deeply into your app, you’ll be more likely to get all the support tickets right inside your app anyhow.

- **Reamaze Price**: $15/month per user for full features
- **For a deeper look at Reamaze features and pricing plans, check out our Reamaze review.**
- **See Reamaze integrations on Zapier**

**Deskero (team inbox, knowledge base, social, chat)**

for simple social support

Ever wondered what support requests your competitors are getting—or if your customers are having trouble but don’t ask your company
for help? Deskero helps you find out by monitoring social networks right alongside your support requests. It can pull in any support requests you receive from LinkedIn as well as Twitter and Facebook, then monitor each network for mentions of specific keywords. That’ll let you find people who need your tool and see what your competitors are doing, right along with your regular support.

That’ll take extra time out of your support day, but Deskero’s support interface helps you stay on top of everything. You can preview entire support messages and write your replies right in the dashboard, without ever having to jump back and forth between screens. And if you ever need to switch to another customer support app—or want to analyze your support and social data—there’s XML exports to take everything with you.

- **Deskero Price**: Free for 1 user and 1 social account; from $15/month per user Social plan for complete social integration

**UserEcho (team inbox, knowledge base, forum, social, chat)**

*for learning from users*
Your customers are telling you what new features they’d like to see and what bugs need fixed every time they send you a support ticket. Whether they directly ask for it, or just mention a problem that bug or lack of feature is causing, each support ticket should be a vote, a reminder that you should get this fixed. UserEcho helps you keep that in focus.

It’s a forum-focused support tool where your users can ask for new features, add comments and thoughts about them, and upvote their favorite ideas. Each new comment and vote will show up in your email support queue, along with the rest of your support emails, so you’ll never forget about the things that are most important to your users. You can solve their problems and answer questions, while prioritizing the most important new features for your development roadmap at the same time.

- **UserEcho Price**: $15/month per user for full features See UserEcho integrations on Zapier
Pick the Best Customer Support Tool for Your Team

With so many great apps, how can you pick the one that’s best for your needs? If you just need to offer email support or build help documentation for your users, almost any app in this chapter would work fine. But perhaps you want something extra—a special feature to help you offer better support? Here’s some quick tips to help you decide:

- Just need a simple tool to answer emails? Help Scout, Snappy, Groove, Deskero, Sirportly, HappyFox, and SupportBee are all great options.
- Looking for an advanced, extendable support tool? Freshdesk and Zendesk both include almost anything you could need.
- Want to look at multiple tickets at once? Desk, LiveAgent, or Zendesk’s tabbed interfaces might come in handy.
- Need your users’ feedback? UserVoice and Tender Support both put an emphasis on user forums.
- Want support that works outside your browser? Front and Kayako’s native desktop apps are great for that.
- Tracking bugs that come up in support? UserVoice makes it easy to identify recurring problems from support.
- Want to offer support inside your app? Reamaze and Intercom make that simple.
- Have a large support team? Zoho Support is free for unlimited team sizes, and SupportBee or Mojo Helpdesk Unlimited cost the same no matter how many people are on your team.
- Want to run a self-hosted support app? osTicket or Sirportly Enterprise are great options.
Add Custom Features to Your Customer Support Tool

Each of these support tools are dependable, and will each help keep your support inbox under control. But no app is perfect—and no app can include every feature. That’s where Zapier app integrations come in. You can use Zapier to connect your favorite apps and add extra features to your support tool.

Disqus’ customer support team is a great example. With their own support tool, they needed a way to keep track of spam messages that were coming in. Zapier, with a Google Sheets connection, proved to be the solution.

“Zapier is a great tool for getting new workflows up and running with minimal effort,” says Disqus product support manager Daniel Matteson. “It provided us a quick and easy way to get this spam data into a Google sheet, allowing us to start taking bulk action on these reports. We’ve since developed more tools to help on this front, but coming up with that first workflow in Zapier gave us a head start.”

“Zapier is a great tool for getting new workflows up and running with minimal effort.” - Daniel Matteson,
You’ll need to add your own extras to make a support app *perfect* for your team’s needs, and Zapier can help you, too. Whether you need to bring in support tickets from other apps, log support data to your CRM, or make sure your team sees the most important tickets—or anything else—there’s a Zap for that.

Here are some popular integrations to help you get started:

**Create Tickets from a Form or Another App**

Many support tools include their own support form so customers can get in touch with your team from your website. If you already have a web form on your site, though, you might want to keep using it instead. Or, depending on your customer support app, you may want to bring in tickets from social networks, chat, or even other email accounts. These and other Zaps can help you out:

**Zapier Integrations:**

- Create a Zendesk Ticket from Typeform
- Create new Groove tickets from new Unbounce landing page form submissions
- Create new cases in Desk from Postmark inbound emails
- Create new Freshdesk tickets from new ClickDesk chats

**Create Tasks from Tickets**

Some tickets take just a quick reply, but others might take hours to solve. You’ll need to loop in the right people, and make sure everyone follows through and closes the ticket. Zapier can automate it by turning your support tickets into bug listings, projects, events, or just a simple task in your to-do list.
Chapter Six: The 20 Best Help Desk Apps and Knowledge Base Tools for Customer Support

Zapier Integrations:

- Create Asana tasks from Help Scout conversations
- Create Pivotal Tracker stories from new UserVoice suggestions
- Create GitHub issues for new Freshdesk tickets
- Create Trello cards from new Zendesk tickets

Share Tickets with your Team

Need to make sure everyone knows about the latest support tickets? Whether you need to share difficult questions in your team chat, ping your dev team when there’s a technical problem, or make sure your support team sees new messages as soon as they come in, all you’ll need is a Zap that connects your support app to your favorite messaging tool.

Zapier Integrations:

- Get Slack notifications for new Freshdesk tickets
- Post a message to Glip when a new ticket is created on UserVoice
- Get notified of new Help Scout conversations via Pushover
- Have Zapier call you for new Desk cases

Log Support Data

You could just answer your support tickets, make sure your customers are happy, and call it a day. Or, you could keep a detailed log of every support interaction, keeping track of common problems and graphing your support team’s performance. Build your own custom new features with a spreadsheet or database, or help your team celebrate when the support queue is empty—these Zaps will take a bit more creativity, but they’re also incredibly powerful.
Zapier Integrations:

- Add rows to Smartsheet for new Desk cases
- Track the number of new Freshdesk tickets over time in Cyfe
- Send new Help Scout conversations to Contactually contact history
- Add new Zendesk tickets to Google Sheets

Start Trying a New Support Tool Today

Whether you need a simple tool just to answer emails, or a full-featured support center that lets you talk on the phone, live-chat, and turn feature requests into realities, there’s a support app that fits your needs. You just might have to try a few on and see which works best for your team.

So don’t be afraid to experiment—after all, your support team will have to use the app you pick all day, every day for the foreseeable future. Try a few of the apps above that seem to fit your needs best, and see which one sticks. Then, bring over your support documentation and accounts, and dig in. Make your new app feel like home.

With that done, it’s time to get back to providing great customer support, and building better products. That—not your support tool—is what matters anyhow.

Email and documentation are great, but they might not be enough. If your customers need real-time, one-on-one help, you might do
better with a dedicated live chat app. In the next chapter, we’ll take a look at the very best live chat apps for customer support.

Or, if you’ve already found the app you need for customer support, jump ahead to chapter 8 to learn how to use your support app’s best features to support your customers faster.

Written by Zapier Marketer Matthew Guay.
You’re trying to buy shoes online, wondering if they’d feel as nice as they look, when ding a smiling face pops up on the bottom of the page asking if it can be of any assistance. You reply, and your worries are quickly assuaged by a real, live human.

That’s the magic of live chat. Online stores can be lonely, impersonal places, where packages arrive in the mail before support emails get answered. Adding the digital equivalent of a salesperson wishing website visitors a good day can be the difference between a happy customer and another sale lost to competitors.

Live chat makes it easy to help customers faster, and prevents a backlog of delayed answers, angry customers, and lost opportunities. But it can also be a burden on your support team, something that’s always interrupting their day with yet another question to be answered right now. That’s why you need a great live chat app, one that helps you answer questions quicker and pause the incoming chats when your team’s away.

Here are 10 of the best live chat apps to help your team support
customers in real time.

**Why Live Chat?**

Like email, live chat lets you answer questions. Unlike email, however, live chat lets you engage customers while they’re still on your site and ready to make a decision—not hours after they’ve left.

Email lets you answer questions anytime, which is great for your support team. It might not be so great for your users.

*Forrester Research found* that 44% of online shoppers say that live chat is one of the most important features a site can offer, while Wells Fargo saw double-digit sales increase after adding live chat to their site.

Live chat works for customer support because it’s fast and personal. The initial message asking if a customer needs help can be robotic, but the real answers *have* to come from a real human, right then without waiting days for an email response or hours for your call to be important enough for the company to answer it.

It’s tough to offer great support over live chat. Your team will need to be available and ready to answer questions promptly during your listed business hours. And you’ll need to be friendly enough to make the chat fun and engaging for your customers.

Set your customers’ expectations well with listed hours for live chat and estimated wait time, though, and live chat support can help you answer questions faster, turn visitors into customers, and keep from having a support backlog each day.

**The Best Live Chat Support Apps**

Live chat requires a support team that’s ready to answer questions, but it also requires a tool to help you chat with customers from your
site. There’s a ton of options, from live chat tools built into support center apps, to standalone chat tools that can integrate with your favorite support apps.

The best live chat apps for support also show which pages the customer has visited, provide canned responses to frequently asked questions, integrate with your other tools, and perhaps even include tools to show (rather than tell) a customer where to find what they’re looking for.

Let’s look at the standalone live chat tools first, ones you can use just for chat alongside your other customer support apps. Then we’ll peek at the best full-featured customer support apps that also include chat tools.

**The Best Live Chat Apps**

Just need a chat tool, for a simple way to customize a chat box, add it to your site, and start interacting with your customers in real-time? These apps are the best tools for just that. They’re focused on chat, so they’ll include the best features for talking to customers live—and then they’ll integrate with the help desk and other apps you already use.
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<td>chatting with customers in any language—and on Facebook Messenger</td>
<td>Free for 1 agent; from $11.20/month per agent</td>
</tr>
<tr>
<td>Olark</td>
<td>fully customized live chat with cobrowsing</td>
<td>Free for 1 agent with 20 chats/month; from $12/month for 1 agent</td>
</tr>
<tr>
<td>Intercom</td>
<td>lead tracking and stickers in live chat</td>
<td>From $49/month for chats with 250 people</td>
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<td>HappyFox</td>
<td>chatting with multiple customers at once</td>
<td>Free for 10 agents; from $14.99/month per agent</td>
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<tr>
<td>SnapEngage</td>
<td>PCI-encrypted and HIPPA compliant live chat</td>
<td>$17/month Solo plan for 1 agent; from $63/month for 4 agents</td>
</tr>
<tr>
<td>LiveChat</td>
<td>live chat in desktop and mobile apps</td>
<td>$16/month per agent</td>
</tr>
<tr>
<td>Pure Chat</td>
<td>live chat without your own website</td>
<td>Free for unlimited agents and 15 chats; $15/month for 3 agents</td>
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**Zopim**

*for chatting with customers in any language—and on Facebook Messenger*

Zendesk’s one of the most popular customer support apps, designed
around email but with the flexibility to pull in other apps to help you offer support on social networks and more. That’s how Zopim—a live chat app acquired by Zendesk in 2014—can help you support your customers in real-time, whether you already use Zendesk or not.

Zopim is a customizable support app with a modern design that can fit into any website. It integrates with CRM apps like Highrise and Salesforce, eCommerce apps like Magento and Shopify, and of course with Zendesk’s helpdesk. It even integrates with Facebook Messenger, so you can answer questions from your fan page. Or, it can run just fine on its own, keeping track of each conversation with your customers, the pages they visit and more.

You won’t have to wait for customers to reach out, either. Zopim visualizes all of your visitors based on categories so you can see who’s sent a message, clicked the chat button (but hasn’t sent a message yet), activated a trigger, is currently browsing your site, or is stuck at the checkout page. From here, you can initiate chats with customers or view detailed information about a specific customer. Speed things up with shortcut canned messages, or let Zopim work for you with triggers that automatically start a chat with a customer when they hit a specific page.

Its most slick feature, though, is language translation. If you work with customers in different languages, Zopim will automatically translate messages for you. Any message you send in English will automatically be translated in the customer’s local language, and vice-versa. It’s an almost magical tool for international customer support.

- **Zopim Price**: Free for 1 agent; from $11.20/month per agent
  Basic plan for unlimited chats and 2 triggers
- **To learn more about Zendesk’s other features, check out our full Zendesk review.**
- **See Zendesk integrations on Zapier**
Olark

for fully customized live chat with cobrowsing

When you need live chat on its own, Olark is one of the most popular options thanks to its deep customization. You can tweak anything you want on the Olark chat box so it fits in with your branding. Add the text you want to the chat prompt, then use CSS to tweak the chat box colors, window size, position, and more.

Then, you can add it to your site, and integrate it even deeper using the Olark API to connect it to your store or apps. There’s integrations with popular CRMs to pull in customer data, along with connections to link Olark with customer support apps like Desk and Highrise. You can even connect it to Google Analytics, to see where your customers visit before they start chatting.

But what if you don’t want to offer chat throughout your whole site? Olark’s Targeted Chat feature is perfect for you. You can set up triggers to start chats automatically based on visitor data, or hide the chat box on certain pages or for those who haven’t made a purchase yet. That way, you can offer live chat just to the customers most likely to buy—or those who have already bought your most expensive products.

Need to hold customers’ hands during a chat? Olark’s Cobrowsing
feature displays your mouse cursor on the customer’s screen, so you can highlight items and show them what to click. Or, you can control their screen if they let you, to help them make a purchase or fix a problem with far less explanation.

You need feedback from customers to know how to improve your support. At the end of a chat session in Olark, the customer is asked to rate the agent’s support and provide feedback. These results can then be tracked and displayed in reports to you know how your team is doing, as just one extra way Olark helps you make your live chat support the best possible.

- **Olark Price:** Free for 1 agent with 20 chats/month; from $12/month **Bronze plan** for 1 agent with unlimited chats
- **See Olark integrations on Zapier**

**Intercom Acquire**

*for lead tracking and stickers in live chat*
Intercom may be best known as a marketing automation CRM, one that tracks what people have visited on your site and automatically follows up with drip emails. But it also includes a just-released live chat app that can stand on its own: Intercom Acquire.

Acquire is a two-way messaging platform: visitors can send a message to your support team, or you can use it to send messages to those visitors automatically. Using a team inbox, your support team is able to answer questions, and leave internal notes about customers’ needs or concerns.

Like other chat tools, Intercom Acquire sits at the bottom of your site, ready for new messages. Its design, however, sets it apart, with a full-height chat pane that looks like part of your site or app. When visitors hover over the icon, they’ll see a friendly chat pane that shows the photos of three online support agents. Chats themselves are fun, too, with stickers, emoji, and support for images and file attachments to both speed up support and make it feel like chatting with a friend. Or, if no one is online, Acquire lets them send an email to your support team, and gives an estimate of how quickly you’ll get back in touch.

The best part about Acquire, though, is that it keeps track of everything about your visitors: their emails and chats, the pages they’ve visited and buttons they’ve clicked, and more. It can pull in data from Intercom, of course, but also connects with other CRMs and customer support apps. Whenever you’re chatting with a customer, you’ll have all their info at your fingertips and they’ll have all the information they need for the visitor and their history.

And you can let your whole team join in on live support, since Intercom is priced on how many people you talk to—not how many people are on your team.

- **Intercom Acquire Price:** From $49/month for basic features and chats with up to 250 people
• To learn more about Intercom’s other features, check out our full Intercom review.
• See Intercom integrations on Zapier

HappyFox Chat

for chatting with multiple customers at once

People don’t like waiting in line for service—and there’s no reason you shouldn’t be able to help multiple people at once, especially if you’re waiting on a customer to try a solution or find extra info. HappyFox Chat lets you chat with as many people at once as you can handle, with a simple interface that’s focused just on your active chats.

There’s still enough room for all the data you need, though. HappyFox Chat integrates with over 100 apps, so you can pull in support tickets from your help desk or recent order info from your eCommerce tool right inside chats with customers. Then, you can quickly reply with canned messages that can be activated by typing a hashtag. Everything’s kept inside a chat window, showing
you just the info you need without an overwhelming number of sidebars.

And it’s free, too, for up to 10 agents—though your chat history is only kept for 14 days. That might be enough to help your team get started with live chat support, and then you can upgrade to a full plan later as your team grows.

- **HappyFox Chat Price:** Free for 10 agents; from $14.99/month per agent **Popular** plan for 1 year of chat history and more integrations
- **To learn more about HappyFox’ other features, check out our full HappyFox review.**
- **See HappyFox integrations on Zapier**

**SnapEngage**

*for PCI-encrypted and HIPPA compliant live chat*

SnapEngage is a support chat app you’ve likely encountered before as a customer, as it’s the tool brands like AirBNB and and T-Mobile use to power their chats. It’s designed with enterprises in mind, with
PCI encryption and HIPPA compliant data management so you can use it in any business.

It’s customizable, integrates with popular apps, pulls in customer info from social networks, and includes mobile apps so you can chat on the go. It includes Cobrowsing as well, so you control your customer’s browser during the chat if they let you, to help fix their problems and even fill out forms. Or, you can embed a secure form into your chat box, to collect credit card data or other private info securely right inside a chat, perhaps to close a sale or book an appointment.

And if you can’t help a customer yourself, SnapEngage lets you hand the chat off to another support agent—or you can transfer the chat to a call and talk a customer through their problems without typing.

- **SnapEngage Price**: $17/month Solo plan for 1 agent; from $60/month Basic plan for 4 agents and basic features

**LiveChat**

_for live chat in desktop and mobile apps_
Ever missed a chat session just because you accidentally closed a tab? LiveChat’s desktop and mobile apps will keep that from happening again. Whenever someone starts chatting, you’ll get a push notification and can quickly reply. Or, you can see everyone who’s currently waiting for help, with color-coded icons to who who needs help the most urgently.

You’ll never have to wait for customers to finish typing, as LiveChat shows what they’re writing before they press send. And you’ll also never have to look up their earlier chats—instead, just scroll up, and you’ll see what was said last time your team talked to this customer.

- **LiveChat Price:** $16/month per agent **Starter** plan for basic features and 60 day chat history
- **See LiveChat integrations on Zapier**

**Pure Chat**

*for live chat without your own website*
Don’t have a website for your business—or need a way to offer live chat for mobile apps? Pure Chat makes that simple, with a customizable page where customers can start chats without your own website. In fact, the chat page can be your own simple website, complete with a customized background, contact and social info, and more—along with that all-important chat box.

Chatting with multiple customers at once is easy, with Pure Chat’s tabbed interface that gives you multiple conversations and complete info on everyone at once. And if your customers would like a record of the chat once you’ve solved their problems, you can easily email them a transcript or share it with your team.

- **Pure Chat Price**: Free for unlimited agents and 15 chats per month; $15/month Starter plan for 3 agents and unlimited chats
- **See Pure Chat integrations on Zapier**
# Alternative Live Chat Apps

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<td>Already use Slack to chat with your team members? Chatlio lets you chat with your customers right inside Slack, with a widget on your site that sends your customer’s data to Slack so you can answer questions without leaving your team chat app.</td>
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<td>Chatra</td>
<td>Support chat apps tend to be drab, but not Chatra. It lets you customize your internal chat interface—not just the chat widget on your site—so your support team can enjoy answering tickets. And it’ll show you what people are typing before they hit send.</td>
<td>Free for 5 agents; $9/month per agent</td>
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<td>LivePerson</td>
<td>Choosing which customer to answer first can be tough—how can you know who has the most urgent problem or is most frustrated by the delays? LivePerson can help, with text-analytics that decides how positive or negative a customer is feeling, so you can see who needs help most urgently—and who’s most happy with your support.</td>
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<td>BoldChat</td>
<td>Chat on your website might not be enough. BoldChat works everywhere, with mobile browser support, tools to add chat to your mobile app, and an option to chat over SMS messages. And if you need, you can control your customer’s browser to help them fill out forms and more.</td>
<td>From $50/month per agent</td>
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<td>Firehose Chat</td>
<td>Want an easy way to chat with customers on the go? Firehose Chat’s mobile and desktop apps make support chat feel like chatting with friends in your favorite messaging app—and it’s free. You can reply from notifications on your phone, see on a map where your customer is, and set do-not-disturb hours so you don’t get chats during the night.</td>
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<td>Velaro</td>
<td>Knowing more about the person you’re chatting with can help you solve problems faster—or at least put a friendly face behind the chat. Velaro lets customers log in with social networks so you can get more info with every chat. And if you can’t understand something, there’s Google Translate built in to help.</td>
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## The Best Help Desks with Live Chat

Live chat isn’t *all* you need. You’ll also need to answer your customers’ emails, **build a knowledge base** with support documentation, and perhaps even jump on the phone with them to explain things quicker. If you want one app to do it all, these apps—or some of the above tools, including HappyFox, Intercom, and Zendesk—are some of the best ways to juggle everything support sends your way.
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**LiveAgent**

*for real-time insights on your chats*
LiveAgent puts just as much focus on live chats as it does on email, and it shows. Instead of treating every ticket the same, LiveAgent puts chats in their own dashboard, complete with an overview of every currently ongoing chat. You’ll see who’s currently browsing your site, where they’re from, and how long each chat has been going on.

If you’d like to nudge customers to get in touch if they need help, perhaps after they’ve been on your checkout page for 2 minutes or have visited your support site 3 times, LiveAgent can automatically prompt them to start chatting. But it’ll also make sure your team won’t get overwhelmed, as it’ll only send out a prompt when there’s a support agent free to chat. You can set how many chats each agent can handle at once, and LiveAgent will share the workload around, making sure no one gets overworked.

- **LiveAgent Price**: From $29/month per agent Ticket+Chat plan for chat and support ticket tools
- **To learn more about LiveAgent’s other features, check out our full LiveAgent review.**
- **See LiveAgent integrations on Zapier**
Chapter Seven: The Best Live Chat Apps for Customer Support

**Zoho Support**

*for live chats and phone calls in one app*

Already using Zoho tools to manage other parts of your business? **Zoho Support** might be the one extra app you need to start using to answer support emails, build a knowledge base, and chat with your customers.

It’s deeply tied into Zoho’s other apps, so you can pull in Zoho CRM data to learn more about your customers while you’re chatting, along with the rest of the data you’ve already gathered in support. You can work together as a team, handing off tickets when they’re too difficult for you or having chats routed to specific teams automatically based on the customer’s questions.

And if you need to jump on the phone to help out a customer, Zoho Support’s phone tools include everything you need. You can setup an interactive voice system to route calls, use voice mail to catch your customers’ questions even when you’re away, and call recording to keep a record of everything you’ve talked about.

- **Zoho Support Price**: From $12/month per agent **Professional** plan for chat support
One of the most popular full-featured customer support apps, Freshdesk includes live chat in addition to its email and knowledge base tools. And it’s not just for supporting your customers—Freshdesk’s live chat also lets you talk to anyone else on your team. That way, you can check with another support agent about how to answer a question—or just see how their day is going—without having to step away from your support app.

It’d be easier to answer customer questions if you knew more about their problems before you start chatting. Freshdesk makes that easy by including a form in the chat box to gather more info before initiating the chat session. It can then route the chat to the correct department or agent depending on the customer’s needs.

Then, Freshdesk includes gamification features to help your team stay motivated. Chat with enough customers or answer enough tickets in a day, and you’ll end up on the leaderboard with virtual trophies and badges. It’s a tiny thing that might help keep you chatting with customers, even when you’re tired of answering
questions.

- **Freshdesk Price:** From $25/month per agent Garden plan for live chat and email support tools
- To learn more about Freshdesk’s other features, check out our full Freshdesk review.
- See Freshdesk integrations on Zapier

Looking for more full-featured customer support apps that include live chat? Jump back to the previous chapter for our full roundup of the best customer support apps, many of which also include live chat tools.

Now that you’ve found the perfect apps to support your users, it’s time to learn how to use them well. In the next chapter, we’ll look at the best tips and tricks to support your customers better and faster using automations, keyboard shortcuts, macros, and much more.

Written by freelance writer Sean Kennedy, with contribution from Zapier Marketer Matthew Guay.
Some jobs are best for robots. Customer support is not one of them.

The phrase “Support Automation” brings cold “interactions” to mind. There’s no empathy in automated “thank you for writing” emails. And that phone recording with promises that “your call is important to us” never really makes anyone feel important.

And yet, if you work in customer support, you would welcome a robot’s helping hand.

Each incoming support ticket involves a customer and a problem. The support team needs to figure out if that customer has interacted with the company before, what their problem is, and whether it can be solved with an existing help document or if it needs a custom solution.
Finding that information on your own is time-consuming and tedious—something perfect for automation.

We think you should hire a robot to help with your customer support—but you should hire it for the right job. Get it to help you gather data on your customers, figure out their problems, route their tickets to the correct person, and make sure problems get fixed. Leave the interactions to us humans.

That’s the secret behind the great support that Trello, HubSpot, and hundreds of other teams offer their customers. They’ve hired a robot to help their team offer more personalized support. Here’s an inside look at how they do it.

How to Speed up Customer Support

- Use Your Support App’s Best Features
- Import Your Support Tickets
- Bring in Customer Data
- Translate Support Tickets
- Notify Your Team & Assign Tickets
- Monitor Important Parts of Support
- Solve Problems Automatically
- Log Support Data
- Build New Support Tools

Use Your Support App’s Best Features

It all starts with your customer support app, the place where emails, Tweets, chat messages and more come in from customers. Just like
your personal email inbox, your customer support app’s team inbox is likely to become a cluttered mess unless you’re careful.

There’s nothing more discouraging than seeing an inbox full of unanswered messages. That’s why most customer support apps include tools to help you manage messages.

Filters

Setting up a filter in Desk

Filters are one of the handiest tools in any customer support app. Instead of letting every message show up in one inbox, filters automatically sort messages based on their content, subject, sender and more.

“It’s important to automate as much support as you can,” says Trello support agent Emily Chapman. “Not in terms of responses, but in terms of autotagging, moving cases into appropriate folders or buckets, and reducing the amount of manual monitoring required.”

Filters are the best way to make your support inbox smarter. They can move technical tickets into a folder for your technical support team, or automatically get rid of spam messages. Filters can even
add extra data to tickets, like tags or urgency ratings, depending on how much time has passed since the ticket was received.

Connor Riley, co-founder of coffee subscription service MistoBox, uses the filters in Desk to organize his inbox. “You can do just about anything with Desk’s rules and filters without a line of code,” he says.

No matter which customer support app you’re using, filters will help you eliminate tedious tasks from your workflow.

**Keyboard Shortcuts**

Some of Help Scout’s handy keyboard shortcuts

When you spend all day typing, saving a few clicks can make a huge difference in your efficiency. That’s where keyboard shortcuts shine. They keep your fingers on the keyboard, so you’re primed to answer tickets.

Keyboard shortcuts are Zapier CEO Wade Foster’s favorite trick for doing customer support faster. Help Scout, the support app Zapier uses, includes keyboard shortcuts for starting a reply, sending a message, setting a ticket’s status, jumping to a specific folder, and more.
Take the time to learn the keyboard shortcuts in your support tool. If a keyboard shortcut shaves just 15 seconds off answering a ticket, that’ll add up to 4 hours saved for every thousand questions you answer.

**Pre-Written Replies**

A *pre-written reply to a common question in Groove*

The entire goal of good support automation is to give each customer *more* personal attention. But some questions really only need to be answered once.

That’s where saved replies—which may be called common replies, templates, or macros depending on your app—come in. You can write a reply to a common question once, then reuse it in your answers with a click. Depending on your customer support app, you may be able to use your knowledge base articles in a reply, or can include the customer’s name or other info with variables to save more time.

Great support still requires a personal touch, so don’t go overboard with pre-written replies (at least customize your message a bit). But for common questions, they’re a powerful tool that gets your
customers the info they need faster.

Now it’s time to reach beyond your support app’s baked-in features. Here’s how you can bring in tickets from all of your apps, notify your team of new tickets, assign issues to the right team member, pull in customer data, solve problems automatically, build new support tools, and much more.

**Import All Your Support Tickets**

Support tickets come from everywhere: email, phone calls, chat, Twitter, and Facebook are all fair game.

Bringing all those tickets into one place is an obvious way to simplify support. Instead of checking a dozen inboxes, there’ll be a central location for every support message.

Your customer support tool might already include integrations with social networks that pull in any questions automatically. If not, Zapier can help.

Internally at Zapier, we use a Twitter to Mailgun Zap to turn Twitter mentions into emails that come into our Help Scout inbox, using filters to keep common tweets out. The appFigures team does something similar, connecting chat app Olark with their Reamaze customer support inbox to see chats and emails together.

“Because we leverage Zapier to funnel all channels into a single place, we can communicate using notes, use custom member profiles, and follow up with the member directly from a single thread,” says appFigures co-founder Ariel Michaeli.

**Zapier Integrations:**
Forms are another great way to gather questions from customers. You can make a form, put it on your website or inside your app, then use Zapier to route the questions into a help desk.

The Konseptly team uses Zapier to connect their Typeform form to their SupportBee support inbox, while the Kairos team relies on a Wufoo form they’ve connected to Groove with Zapier—which also sends Slack notifications to let them know when new tickets come in.

Konseptly also uses their form to log support entries into Insightly CRM, to help them gather as much info as possible with each new support ticket. As Konseptly CEO Steffen Engman said, “It’s hard to say how much time the integrations have saved in total, but as the company grows in terms of employees, the amount of time saved grows as well.”

**Zapier Integrations:**

- Create new Groove tickets from new Wufoo form entries
- Create SupportBee tickets from Typeform entries

You could even use Zapier to build a customized support inbox. For example, the Estimote team receives all of their business inquires in a Gmail inbox while working to close deals in SalesforceIQ. But it wasn’t working as well as they wanted.

“Managing hundreds of daily inquiries across numerous team members with Gmail alone just wouldn’t allow us to scale as quickly,” says Estimote business operations manager Roshan Prakash. So they connected Gmail to both SalesforceIQ and Front—a collaborative
email inbox—using Zapier. That way, their emails automatically moved to the correct inbox.

“Zapier helps us connect multiple business-critical tools, streamline processes, and deliver great customer experiences along the way,” says Prakash.

**Zapier Integration:**

- Save Gmail messages as SalesforceIQ events

**Bring in Customer Data**

“When I think about building an efficient support workflow, it always starts with solving problems for the customer.” - Sam Awezec, Sidekick Product Specialist Manager, HubSpot

Building a new product inside a company is a challenging endeavor—one that’s bound to create confusing support challenges. That’s one of the things that makes Sam Awezec’s job difficult as product specialist of HubSpot’s new Sidekick email tracking tool.

To make sure his team can answer tickets as quickly as possible, Awezec uses Zapier to add customer data to each request automatically. “Every new ticket in Zendesk triggers a Zap to HubSpot,” says Awezec. “We then sync back as much information on the customer as we wish to have.” That info tells his team how long someone’s been a user, if they have a paid account, whether they’ve ever received a marketing email, or if they’re currently in a beta program.

They can then use that data in HubSpot to see if a beta feature is causing more support tickets, or if new users seem to be having more trouble. “As our product adapts and expands, Zapier gives
us the ability to quickly and easy update relevant information in our support software without the assistance of a developer,” says Awezec.

**Zapier Integrations:**

- Update HubSpot contacts from Zendesk tickets
- Add contacts to a HubSpot workflow from Zendesk tickets
- Update Zendesk tickets when HubSpot properties change

You can even integrate your website directly with your customer support tool using Zapier. The MistoBox team uses Mixpanel’s webhooks and Zapier’s Desk integration to gather data on customers before they even send in support tickets.

“We use Mixpanel webhooks to trigger cases and set various customer fields in Desk, and use these fields to prioritize inbound cases,” says MistoBox cofounder Connor Riley. “It allows us to get back to our most valuable or at-risk customers faster.”

This extra customer data directly affects MistoBox’s bottom line. “It can be the difference between a new and lost customer, and often times we find out about web issues and bugs through support cases first,” Riley says.

**Zapier Integration:**

- Create Desk cases for new webhook data
Translate Support Tickets

It’s not perfect, but Google Translate can help in a pinch

Chances are you’re going to get some support tickets in a language no one on your team understands.

Google Translate is the easy solution. Just copy and paste the message into Google Translate, and it’ll give you a rough translation. If you use Google Chrome, it’ll recognize the foreign language in a ticket and offer to translate it without any extra steps.

For a more reliable translation, the Trello team turned to Unbabel. “We provide international support by using Unbabel to translate from English,” says Trello’s Chapman. “We have a Zap that lets us know when Unbabel emails us back with the completed translation.” That helps them provide personalized support, no matter where a customer is from.

Zapier Integrations:

- Create Help Scout conversations from parsed emails
- Send emails into Slack
Notify Your Team & Assign Tickets

“Communication between team members is key to fast and effective service.” - Ariel Michaeli, cofounder, appFigures

You could keep your customer support inbox open all day and still miss new tickets. That’s why so many teams rely on a team chat app like Slack or HipChat to help manage their support queue. It doesn’t need to be anything fancy—just a simple way to make sure everyone sees each new support ticket.

The Small Farm Central team, for instance, posts every new support ticket to HipChat. That way, as founder Simon Huntley said, “we can respond quickly and assign them to the appropriate team member. It is pretty simple, but it is a big win for us.”

Zapier Integration:

- Share Tender Support discussions via HipChat messages

Amy Choi’s team at Heyzap does something similar with UserVoice and Slack. Each new support ticket they receive is added to their #Support channel in Slack. Then, they triage new support tickets each morning, discuss difficult issues, and assign questions to the correct team member.

“This allows us to view and discuss every request in real time without opening additional windows, loop in relevant people outside of the support team, and properly allocate to the correct team member,” Choi says. “Some of the more complex tickets need some discussion before we can assign, and Slack is a much better avenue for this than UserVoice.”
And since the Heyzap team already spends the day in Slack, no support ticket goes unseen. “It also allows us to catch emergency tickets faster, since not all of us have UserVoice open all the time,” Choi says.

**Zapier Integrations:**

- Get Slack notifications for new UserVoice tickets
- Get Slack notifications for new UserVoice comments

You can even use your team chat app to create a support workflow that ensures customers get an answer as quickly as you’ve promised. The Trello team uses a Help Scout-to-Slack integration to get notified when a user who pays for an enterprise plan has a problem. “That’s how we make sure they get immediate help,” says Trello support agent Emily Chapman.

Slack also helps the Trello team keep track of escalated tickets. “If we tag something as on fire in Help Scout, it will trigger a ping in a Slack channel,” Chapman says. Their Zaps make up an entire support-escalation workflow in Slack, preventing any ticket from falling through the cracks.

“Basically our Zaps help us see very important info as quickly as possible, so we can go deal with it as appropriate in Help Scout,” Chapman says.

**Zapier Integrations:**

- Get Slack notifications for new Help Scout conversations
- Share new Help Scout assigned conversations in Slack
Monitor Important Parts of Support

“I like to use Zapier for tasks that require constant record keeping and monitoring.” - Daniel Matteson, Product Support Manager, Disqus

Blazing-fast support is important, but you should also monitor the underlying causes behind your support tickets. If 10 people write in about the same bug, that bug needs to be squished stat.

Disqus is an app designed to help people comment and discuss their thoughts, but the Disqus team still needs some extra help making sure they don’t miss critical bugs. For that, they have a Zapier integration that posts new issues to a dedicated Slack channel.

“I like to use Zapier for tasks that require constant record keeping and monitoring,” says Disqus product support manager Daniel Matteson. And this integration, he says, “gives me a place to pop into periodically to keep an eye out for any new and unknown issues that need fixing.”

Zapier Integration:

- Get Slack notifications for new Disqus comments

You might also want to monitor your customer support app (even the best ones have outages). At Zapier, we use a Twitter integration to watch the Help Scout Twitter account, which then notifies us on Slack whenever Help Scout has downtime. It’s a tiny thing that keeps our support team in the know.

Zapier Integration:

- Share tweets from a Twitter user to Slack channels
Or, your team may need to dive deeper into a support ticket, perhaps doing extra work or solving a problem before you can reply to the user. The doctorSIM team uses Trello for that, sending complicated tickets from Zendesk to Trello to make sure they’re followed up on.

You could do the same thing with your team’s project management or to-do list app, turning tickets into tasks that won’t be forgotten in your support inbox.

**Zapier Integration:**

- Create Trello cards from new Zendesk tickets

**Solve Problems Automatically**

Most customer support still needs to be done by hand, with a friendly, human answer to solve problems. But some problems can be tackled automatically. Build an integration that solves those, and you’ll free up even more of your team’s time—something the Sidekick team at HubSpot has done brilliantly.

“When a user signs up for our free product, we send them a confirmation email,” says Sam Awezec, Sidekick product manager at HubSpot. “However, inevitably some people do not receive this email. Any support team would strive to get these resolved as quickly as possible, but at best there would still be a 20- to 30-minute delay behind the request for a new confirmation link.”

To avoid that delay, the HubSpot team turned to Zapier. “When a new ticket comes in that mentions anything related to getting setup or confirmation, it triggers a Zap to HubSpot,” Awezec says. “If this person is a new user with a pending confirmation email, then another zap syncs back to Zendesk and automatically sends a new confirmation email.”
“First and foremost this solves a problem for the customer, since time to value when you are trying a new product is very short—so even waiting 30 minutes for our team to send you a confirmation link can be a bit long.

“When we use Zapier, the customer always receives an email within 5 minutes and in turn this also reduces pressure on our team,” Awezec says.

**Zapier Integration:**

- Add contacts to a HubSpot workflow from Zendesk tickets

Some of the most repetitive emails your support team needs to send can be automatically taken care of, leaving them with the tickets that need a personal touch.

**Log Support Data**

“You can never have enough information on a customer, so set up zaps to capture everything in your CRM.” - Lucy Zhao, Product Marketing Lead, Plavo

It’s not enough to have detailed data on each customer in your support tickets. To optimize your support workflow and make sure you’re improving support over time, you’ll also need to track each of your customer interactions and log data about every ticket.

The Plivo team uses Zapier to save a record of each customer support interaction to their CRM, so everyone can track customer interactions. “This way, our sales and account management team can be on top of every customer interaction,” says product marketing lead Lucy Zhao. “You can never have enough information on a customer, so set up Zaps to capture everything in your CRM.”
If your customers often send file attachments along with support tickets, you might also want a safe place to store them. That’s why the doctorSIM team connected Zendesk to Dropbox. “Tickets with attachments are sent to Zapier, then stripped, classified, saved to Dropbox, and we’re notified via email,” says CEO Hugo Meana. With over 20,000 tickets coming in each month, Meana says, “doing this manually would be impossible.”

**Zapier Integrations:**

- Save attachments from Zendesk tickets to Dropbox
- Save Zendesk tickets as Dropbox text files

Or, you could connect your help desk to reporting tools for deeper insights into your tickets. Track each new support ticket on a team dashboard, perhaps, or build your own reporting tools with a database or spreadsheet.

At Zapier, we’ve connected Help Scout to a MySQL database to log tickets based on their tags. That helps us see what topics generate the most questions, and where we could improve our help documentation.

**Zapier Integrations:**

- Update Geckoboard text widgets with new Freshdesk tickets
- Log Help Scout conversations into a MySQL database

**Build New Support Tools**

“Zapier is a great tool for getting new workflows up and running with minimal effort.” - Daniel Matteson, Product Support Manager, Disqus
Sometimes that one feature you need simply doesn’t exist. Your support tool doesn’t include it, there’s no 3rd-party option, and your only choice is to get a developer to build it for you.

Or, you could use a Zap to make your own feature without coding. That’s how the Disqus team built their first abuse report feature, without using any developer time.

“We knew we wanted to use a survey format in order to get all the abuse report information we needed in order to investigate, but we also wanted to use Desk to process the completed surveys,” says Disqus product support manager Daniel Matteson. “Zapier allowed us to automatically create new emails in Desk every time a new survey was submitted in Wufoo. Pretty soon, we were receiving hundreds of reports per month from users that needed our attention, right in Desk.

“Zapier provided an easy way for us to quickly route abuse reports so we were able to focus on handling them and learning more about the challenges many Disqus users face every day.”

Disqus’ first spam reporting tool was also built using Zapier and a Wufoo form. “Zapier provided us a quick and easy way to get this spam data into a Google sheet, allowing us to start taking bulk action on these reports,” Matteson says. “We’ve since developed more tools to help on this front, but coming up with that first workflow in Zapier gave us a head start.”

Zapier Integrations:

- Create new cases in Desk.com from Wufoo form entries
- Save new Wufoo entries to a Google Sheets spreadsheet

Whatever new tool you need to add to your support workflow, Zapier can help you prototype and build a working version with a
form, spreadsheet, database, or any other app you’re already using. Without any coding, you can make your own customer support tools that’ll help your team be more productive.

Build the Best Support Workflow

There are so many things you could automate in support, tricks that would save you time and give you more data on your customers. But don’t automate for automation’s sake: do it with a purpose. Build things that solve problems for your support team; things that actually help you personalize your support and close tickets faster.

“When I think about building an efficient support workflow, it always starts with solving problems for the customer,” says HubSpot’s Sam Awezec. “If you come at any problem with this mentality, then you will build out processes that make your customer happy and in turn help the team at the same time.”

And you likely won’t hit on the perfect balance the first time, which is why Kairos’ Cole Calistra says to “Experiment and try different things.”

“What you come up with at the beginning is not likely to be the optimal workflow,” Cole says, “but it’s easy enough to change and rework it in a few clicks that you can set it up a variety of different ways without much effort.”

Whether you master keyboard shortcuts, discover more about each customer, or build a brand-new tool to assist with support, each test is a step towards offering the very best support possible. And your customers will love how your support gets faster over time.
An efficient customer support app is a great tool to have on hand—but macros and automations alone won’t keep your support team from being overwhelmed with questions and tickets. In the next chapter, we’ll look at how to build a successful help center and fill it with useful documentation, so your customers can help themselves and solve problems on their own.

Written by Zapier Marketer Matthew Guay.

Image Credits: Toronto photo from Mike Boening on Flickr.
How to Minimize Support

Including:

• Everything You Need to Know about Support Documentation and Building an Effective Help Center
• How to Collect Customer Feedback That’s Actually Valuable
• Start Preventing Fires: How to Implement Proactive Customer Support
Chapter Nine: Everything You Need to Know about Support Documentation and Building an Effective Help Center

It’s 11p.m., you’re driving down a remote road on a clear, starry night when Pop! the stillness of the dark is shattered by a blown-out tire. You’re safe but stranded in the middle of nowhere.

Denial and panic are soon followed by acceptance as you realize there must be a spare tire and jack somewhere in the car. And so, almost without thinking, you open the glove compartment and reach for your car manual.

You never took time to read it before—you have better things to do than read a manual. But now that you need it, the manual is your best friend. You owe your sanity to the writer and designer who made your first time changing a tire seem like a familiar chore.

Documentation is important. It’s the hidden work behind the flashy products, the humble text and graphics that give you knowledge
on the fly when you need it most—without requiring someone to personally assist you.

It’s easy to ignore documentation, and offer your product to customers without a user guide, help menu, or tutorial. But if you want to set your team and users up for success, everything needs documentation.

How to Set Up a Help Center

1. Decide What to Document
2. Structure What You Document
3. Host Your Documentation
4. Organize Your Help Center
5. Surface Your Documentation
6. Keep Improving Your Documentation
Why Documentation is Important

Documentation is all around us

The Help menu in Google Chrome? That’s documentation. The owners manual that came with your car? That’s documentation. IKEA’s sometimes hilarious drawings that came with your BLÅVIK bookshelves or BJÖRKUDDEN table? Yup, that’s documentation too.

Documentation is the media—text, images, and video—that explain a product or service, the “material that provides official information” according to the Oxford dictionary. Whether it’s a leaflet that tells you how to use your public transit pass, a guide to an internal standard operating procedure, or the knowledge base in Microsoft Office’s Help menu, documentation delivers everything from the basic to the advanced.

“The goal of documentation is to turn novices into experts,” says programmer and blogger Steve Losh. “Think of your documentation as a lesson (or series of lessons), because that’s what it is.”
experts.” - Steve Losh, programmer

If you have something that describes how your product or service works, that’s documentation. It’s something every business and product should have.

But no one ever reads documentation, you say. I never do. That is, until your tire pops.

“The reason why it doesn’t seem that [people read documentation] is because those are the ones that never call you,” says Joe Cieplinski, a developer at Bombing Brain Interactive. “They read it and they got their answer and you never hear from them.”

People do read documentation. They might not read every last page of a manual, but they will search online for help or click through tutorials to learn how to use a product. Research firm Gartner has found that most people would rather find help documentation online and fix their own problem than call a support center. They’ll look for documentation, and expect you to offer it when they need it.

Here are the best reasons to take the time to make great documentation for your products.

Help Customers Help Themselves

It’s not selfish to want to reduce your support workload—most people want to be able to solve their own problems. As Cieplinski says, “I know from personal experience last thing I want to do is contact developer and ask them a question.” That’s why his team offers as much documentation with their products as possible.

As a user, it’s frustrating to not be able to figure something out. Some people immediately call or email support when they hit a roadblock, but plenty more want to fix their own problems and learn more on their own. Documentation gives customers the
chance to shine on their own. They’ll fix their own problems, feel empowered, and hopefully love your product for it.

They’ll also be far less likely to need personalized support from your team—or at least they’ll understand the product and problem better, making the final support ticket easier to solve. You can even reference your documentation when answering support tickets—another trick Bombing Brain uses to teach customers. “We’ll write, ‘Here is the answer to your question about this feature and this is how you do it and by the way, this is all on page 47 of our manual,’” says Cieplinski.

If customers look for documentation and can’t find it, though, that’ll only make your product look worse. Most people expect products to come with at least some documentation—this is a chance for your team to stand out with even better documentation than users expect.

**Support Your Own Team**

You can use a product for years, and *still* manage to not know everything about it. It wouldn’t be surprising at all to find a Toyota designer who doesn’t know how to change a tire on a Prius, or an Apple developer who doesn’t know how to add a new language to the keyboard.

That’s why Freshdesk says that “a knowledge base is the one thing that can be instantly useful for both your support agents and customers equally.” Your internal team needs to know how to use your product, too, whether for their own reference or to help customers with problems.

Document everything, and your team will be able to quickly find how to do anything in your product. Neglect it, and your support team will waste hours each day searching for solutions that should have been documented from the start.
There’s another advantage for your team: consistency. As information architect Vinish Garg says, “When [everyone is] referring to the same content via a knowledgebase, it ensures consistency in what all customers learn from the support team.”

Document your product once, and then you’ll always know exactly what to say each time a customer asks a question.

**Build Better Products**

It’d be easy to design a tire that takes 2.5 hours to change without anyone on the design team noticing. Document the process, though, and that problem will quickly come to light.

That’s why data scientist Nimit Kalra suggests you write documentation before you build your product. “Writing your documentation beforehand allows you to spot and suppress any bugs or issues that may arise during the actual development,” he says.

Even if you write your documentation after the product is built, you’ll notice pain points and problems in your product. Perhaps they’ll just require better documentation, but more likely, they’ll inspire you to go back to the workbench and make your product better before shipping it to customers. As entrepreneur Sam Carpenter says in his book *Work the System*, “documenting a seemingly flawless system will often reveal small imperfections.”
7 Steps to Setting Up a Help Center

1. Decide What to Document

Don’t let Gumroad’s 4,000-word documentation article intimidate you.

Now, it’s time to write. To shoot videos. To diagram your processes and describe everything you’ve made in a way everyone will understand. It’s time to work.

Creating documentation is important, hard work, Carpenter says. “This is not a feel-good exercise. It’s the mandatory foundation for creating tremendous efficiency. This is the one-time heavy lifting.”

Effective documentation can not only help inform your customers about how your product or service operates, but help keep current employees up to speed—and can even surface defects in a system or process. It’s critical work that’s worth taking the time to get right. It’s a “mandatory foundation for creating tremendous efficiency,” Carpenter says.

With that much at stake, creating documentation can feel daunting. Where do you start?
“Just start,” says Chris Gallo, a member of the Highrise CRM support team. “Break it apart into smaller pieces. Try writing one article today. That’s it. Before you know it, you’ll build momentum.”

Start by documenting the most obvious things. Walk through your product or service, and write about each part of it. Keep a list of the things you think need documented—often surfaced by customer support tickets—then cover them one at a time. Understand user pain points by walking through the process yourself and answering questions or concerns you think users would have.

Don’t stress about how to write, or what to write. For now, just document all the things.

2. Structure What You Document

Smartsheet offers a help article on creating a new spreadsheet before one that discusses inserting columns.

Documentation is only effective when structured correctly. Forget to tell a car owner to jack their car before removing the lug nuts,
and you’ll have an angry customer at best and a lawsuit at worst. And if you don’t include a diagram, few would recognize the jack at first glance, anyhow.

**Explain Everything**

No matter what you’re documenting, your documentation needs to be just as clear. Fog Creek Software founder Joel Spolsky says useful documentation should be “enough to teach people who are new to the domain what the product is trying to do.” Teach people everything there is to know about both your product and the industry it’s for—which is why, in an example he offers, QuickBooks explains both accounting concepts and how to use their software.

“Write as if the customer is a beginning user of your product,” says Gregory Ciotti of the Help Scout team. “Skip the advanced terminologies and jargon.” Don’t assume customers know what you’re talking about; use plain language. It’s okay to over-communicate.

Get your whole team to join in—don’t go at it on your own, and don’t worry if you don’t understand everything. “Your team needs to have a say in [documentation], and be able to pitch in,” says Highrise’s Gallo. “Their perspective is invaluable.” Get developers to explain technical terms, designers to break down workflows and menus. The more people on your team that help with documentation, the more you’ll teach your customers.

**Teach in Logical Steps**

And you need to teach. “If you want to write better documentation, you need to practice teaching,” says Losh. “You need to practice the art of rewiring someone’s neurons with your words.” You don’t need to teach people every possible thing—or as Losh says, “you don’t need to give someone a degree”—but you do need to teach them enough to to be successful with your product.
Teach the ABCs first, then how to make words, then how to make sentences. Put things in orderly steps. Jack the car up, then take the lug nuts off, then pull off the old tire.

**Multimedia is Good**

*Smartsheet provides a video tutorial as part of its documentation on creating a spreadsheet.*

It’s good to use more than just text in your documentation—scratch that—never rely on just text for documentation. Experiment with video walkthroughs for complex features, GIFs to explain simpler concepts, and pictures or diagrams to show what you’re saying.

Cater to different types of learners. Images are super helpful for visual learners when explaining a concept, while a step-by-step tutorial may be better for more analytical learners. Use apps like Skitch or Preview to mark up and add instructions to screenshots—something we do often at Zapier in order to better illustrate a process.
**Watch Your Words**

Media isn’t the only important aspect of a well-structured article. As a team, you’ll want to come up with language and tone guidelines you want to use with customers, like those MailChimp or Buffer made for their team. Then, make sure that tone and language is consistent everywhere.

Pick the terms you’ll use for technical features, and figure out the simplest ways to describe everything. Choose one style of writing—a personality, perhaps—and stick to that. A complicated professional tool might need more scientific wording; a just-for-fun app’s documentation could use a bit of humor.

**Format Matters, Too**

It takes more than text and diagrams to make great documentation. Formatting articles well for easy browsing is equally essential. Sure, people could search through your documentation for a specific tip, but you’d do much better to make everything easy for customers to find.

Freshdesk recommends you treat each article like a mini onboarding process and always state prerequisites. Use simple titles, bold text, and big headers to make it easy to scroll to exactly what you’re looking for. Add bullet points and tables to quickly explain simple steps and points. Tag articles to display related articles and to interlink articles together.

**Make Everything Reusable**

Explaining every feature a dozen times is no fun. So don’t do it. Explain each feature, then link to that explanation any time the feature comes up. Then if you ever change that feature, you only have to update that one documentation article.
Also make your content easy to move around. We write in Markdown at Zapier, using asterisks for italics and brackets for links. Markdown makes it easy to write in plain text and then turn it into rich text or HTML when needed. You could write in HTML, but it’s difficult to read through on its own—and rich text is unreliable, so you won’t be certain it’ll look the same in your help center as it does on your computer.

**Dig Deeper**

Much of the best documentation comes from looking at what your support tickets are telling you. Look at the questions you get asked the most often—something you can often find by seeing how many emails have a specific tag, or by noting how often you reply about different topics. Find which tickets get replies back needing more info and which are solved on the first response.

Those topics are the best things to cover—the things your customers are telling you they need help with.

The more time and effort you put into making a great article can significantly cut down ticket volume. You’re already taking the time to write documentation and shoot videos—take the extra time to edit the copy, ensure the tutorials are structured correctly, and make sure your documentation is accurate and thorough. That time will pay off in spades.
3. Host Your Documentation

Slack relies on Zendesk to host its help center.

When your car has a flat tire, you *instinctively* reach for the glove compartment. That’s where almost every car’s owner’s manual lives, and there’s no reason to assume this car would be different.

Even in today’s Google-first world, it’s still second-nature to check back in your TV’s box for the owner’s manual, or to mouse over the *Help* menu in a program when you get stuck. So put your documentation where people expect—that may be in your website, behind a Help menu, or underneath your widget.

As a rule of thumb, most products today should have online documentation, something that’s called a “support center”, “knowledge base”, or “help center” depending on who you ask. Even if you have printed paper documentation or a *Help* menu in your software, the online documentation lets users find solutions to their problem from your website or via Google.

It’s only natural to Google for solutions, and also second-nature to look for a support page on a company’s website, so make sure
people find your documentation when they look. You can find ours at zapier.com/help/, but it’s also common to use docs.example.com, help.example.com, support.example.com, example.com/support, or example.com/contact.

There are dozens of tools to help you build a knowledge base on your site—you’ll find a documentation tool in most of the best customer support apps, where you can write in rich-text, HTML, or Markdown and easily publish your documentation online. Or, you could host your own documentation, using a WordPress blog or even a plain website. We made a customized Django app for our documentation at Zapier; the Highrise team is using the plain-text CMS Jekyll.

But don’t stop there. If you’re documenting a Tesla, print out your documentation and turn it into a paperback book. Put your documentation anywhere your user would expect to find it—your online knowledge base isn’t enough on its own. Bombing Brain Interactive, the Omni Group, Pixelmator and other iOS developers put their documentation in the iBooks Store as an eBook so users can download it on an iPad.

You might need to find your own unique place for documentation. That’s okay. Be bold, and share it far and wide.
4. Organize Your Help Center

Swiftype makes it easy to find the search box in their help center.

Go to almost any online help center or knowledge base, and you’ll notice something the same element: a prominent search box, right near the top of the page. Underneath that, you’ll likely find an outline of documentation, with categories of articles to help users get started, dig into features, and solve common issues.

Paper documentation is the same. There’s a table of contents, diagrams of the product, followed by pages describing how to use the product and then a set of troubleshooting guides at the end.

It’s a format that works, one your users expect, too.

It’s important to keep in mind the order of how you’re presenting information to the user. If you start with an advanced tip right away, it could intimidate them. The best way to list information is in a chronological order starting with what they need to know as they’re getting started, all the way through to the advanced tips and tricks at the end.
Customer.io’s documentation walks you through each part of the app in order.

Once you’ve listed common “Getting Started” information near the top of the page, the next thing to tackle is creating your categories—the sections of documentation that will explain about each feature. Use icons along with text to make it easy to browse, and feel free to organize stuff in a way that feels logical for your product. There’s no perfect way—you can always experiment.

Dropbox shows 12 categories on its support home.

Then, don’t forget about FAQs—or frequently asked questions. If you’ve been answering questions for your product for quite some time, you’re going to get a feel for the questions that come up the most. Listing a dozen of them both helps customers with those
questions, and also educates new users who will likely read the FAQs as a way to learn more about your product.

Now, tie it all together with search. Most knowledge base tools include a search tool; if yours doesn’t, add one with a tool like Swifttype. Users may browse through individual articles to learn more about your product, but when they need help they’ll want it fast—and that’s when search is crucial.

Swifttype includes a number of advantages that make it a great tool to include. It can predictively search as you’re typing, to suggest related documentation before you’ve even finished writing what you need. Your team can also rank documentation in Swifttype, to make sure your best, most helpful articles and videos float to the top.

Tweak your layout and search, and your customers—and support team—will always be able to find what they need.

5. Surface Your Documentation

MailChimp makes support docs accessible inside its app.
You don’t want your documentation to join the ranks of never-read owner’s manuals, something to throw out with the phone books. After spending the time to write tutorials and shoot videos, you’ll want to see your support center be a popular part of your site.

Putting your documentation where users expect is half of the battle. You’ll of course want to link to the knowledge base in the main navigation of your website—include it in the header or menus, as well as with the index in the footer.

Then, add a “Contact Us”, “Support” or “Help” tab near the side or bottom of your website or app for customers to get in touch. With many knowledge base tools—or with a self-hosted help desk and Swifttype—you can have the support form ask the user what they’re looking for first. It’ll then search through your help center and offer documentation first, before letting them email your support team.

When filling out a help request, Squarespace directs users to its docs before they’re able to submit the ticket.
Your customers will still start to get in touch about questions you’ve already answered, so this is a chance to guide them back to the documentation. When answering questions, be sure to not only answer their questions but also link them back to the article so they get accustomed to visiting your help center and can hopefully head there first for a future question.

Another helpful practice the Zapier marketing team has started doing is mentioning our help center in the product lifecycle emails we send, reminding users where to look for help. Our marketing team also looks at the most frequently visited help articles to decide what we need to describe better to users. If there is a particularly high volume of requests relating to a particular help category, we’ll set up campaigns to go over the most popular topics and explain them in greater detail.

Zapier’s onboarding emails include links to our documentation.

That all makes sure users are aware of documentation, but how do you get people to visit it when they aren’t looking for help? By making it fun. If you offer webinars, pre-recorded trainings, and tips and tricks on how to make the most of some of your product’s features, people are going to want to stick around longer and explore. Make it fun for them to learn and they’ll invest more time into understanding the product and have fewer questions later on.
6. Keep Improving Your Documentation

Zendesk’s documentation asks ‘Was this helpful?’ at the end of every article

Even if you’ve written great documentation, there is always room for improvement. So listen to your customers. Keep writing about topics they’re asking about, and rewrite documentation that still doesn’t seem solve users’ problems.

Now that you have a structured knowledge base, it’s time to circle back and see what’s working—and what’s not. Some knowledge base tools let readers vote on whether an article was helpful or not, while others let you see analytics of your most popular articles or the things users are searching for and not finding. You can even measure how many tickets were created from failed searches on your help desk.

Or, you could even ask people what they think about your documentation. Tweak your support form to ask people if they found what they needed, or if they needed more help. Ask them to pick a category for their question, so you can quantify how many people are asking the same questions. Then take those ideas and turn them into better documentation.
Rinse, repeat. “You’ll never be done,” says Highrise’s Gallo. There are always new features to document, outdated videos to reshoot, better ways of explaining old concepts. But over time, you’ll get closer and closer to documenting everything, and your customer satisfaction rising along with it.

Now Start Documenting!

Zapier’s help center, which features over 500 support articles.

These are some of the many tips we’ve learned the way at Zapier, while building a tool that integrates over 500 app. We’ve learned we must document everything, since there’s far too many parts to each individual integration for any one person to memorize. We’re continually working to improve our documentation, and experimenting with different ways to share info automatically with our users.

What makes it worth it all is when our documentation helps our users accomplish something great on their own.
“Being able to rewire the neurons in someone’s brain so that they understand something they didn’t understand before is extremely satisfying,” Losh says. “Seeing (or hearing about) the ‘click’ when a bunch of concepts suddenly fall together and make sense never fails to make my day.”

We couldn’t agree more.

You can help customers help themselves with great documentation, then make it faster to answer other questions with a great customer support app and automations. But sometimes, the problem is actually your app—and if you listen to customer feedback and the questions they’re sending your way, you’d find ways to improve your products and decrease support at the same time.

In the next chapter, we’ll learn how to collect valuable customer feedback, and how to put it to work for you, with examples on what’s worked for the Intercom team.

Want to learn more about writing documentation? Here are some other great resources:

- The Write the Docs Guide, from a community of software documentation experts
- Mozilla’s guide to writing knowledge base articles for Firefox
- Jacob Kaplan-Moss’ series on Writing Great Documentation
- Or, learn from what others have done by looking at your favorite product’s User Guide or Knowledge Base, or looking through the variety of documentation available at Read the Docs
Written by Zapier People Ops Lead Jess Byrne, with contribution from Zapier Marketer Matthew Guay.
Chapter Ten: How to Collect Customer Feedback That’s Actually Valuable

Getting customer feedback can be tricky. It’s not always easy to know who to ask or even the best way to phrase your questions. And even if you do manage to collect some feedback, what are you supposed to do with it?

For the team behind Intercom, a product that helps companies better communicate with customers, effectively collecting feedback is second nature. But they’ve also learned that helpful customer feedback doesn’t always come in the way you might expect.

For example, when the Intercom team built their product’s map feature, they were focused on allowing users to see where they were acquiring their own new users and tracking those trends geographically. But pretty quickly, Intercom co-founder and vice president of customer success Des Traynor says it became clear that wasn’t how the feature was being used.

“Recently we observed a lot of our users were using the map feature, but they were screenshotting it, cutting out pieces of data and tweeting it or using it in presentations,” he says.
“That wasn’t really what we thought we were building, but we realized that because we were able to talk only to people using the map feature and see what they were using it for, we could get really focused feedback on what was actually valuable about the feature.”

So they did. The team reached out to a group of its users who’d recently engaged the map feature and asked a few simple questions, things like, “How do you use the map feature?” “What do you like about the feature?” and “How could this feature be improved?”

And quickly a pattern emerged. Traynor says the users didn’t care so much about the geographic precision of the map—no one was zooming in on New York City to make sure they had engaged users in every borough—but preferred the feature for showing off the global impact of their business to would-be customers or investors.

“So we learned that the better looking the map is, the more people will use it,” he says. “Because ultimately it’s about vanity and helping people by making (the map) easier to share, hiding commercially significant information and even allowing customers to tweet it.

“All of these things seem obvious, but you don’t get there without finding a way to talk to people using your product and seeing what they actually think.”

The lesson? If you consistently observe a certain behavior from your
users, react to it. It’s a valuable type of customer feedback.

That being said, simply reacting to your customers’ behaviors and suggestions probably shouldn’t be the number one guiding factor when it comes to how you run your business. Frankly, that would be anarchy.

So what feedback actually matters? And how do you know you’re collecting the right type? We caught up with Traynor to discover what’s he’s learned about feedback over the years, how the Intercom team approaches customer interactions and what you can do to start collecting valuable feedback of your own.

**Bridge the Divide Between Company and Customer**

When Intercom was founded in 2011, the company’s co-founders came from varied business and software backgrounds. But Traynor says that all had noticed a common trend: there was a growing disconnect between the people building the business and the customers using their product.

Whereas a coffee shop owner can easily connect with customers on a personal level and establish a rapport with regulars, an engineer at a small software company isn’t afforded the same luxury. Traynor says that in his experience, the phenomenon manifested in a number of potential problems.

“First in that it was hard to see new customers,” he says. “We used to get a PayPal notice of subscription, but even that only carried their email address. We didn’t know what was going on otherwise to try to piece together if they were a good customer or not.”

The second big divide stems from a similar issue: when you don’t know who your users are or what they’re doing with your product, it’s hard to effectively communicate with them.
“The hardest part was that you could either talk to everyone or no one,” he says. “Customers couldn’t reach out except through a support ticket system and it was all very transactional. The only real options they had were to consider the severity or priority of their issue.

“If you compare that with the level of interaction you can have over WhatsApp or SMS, they’re light years apart.”

And as a result, sometimes the outcome and intent of that communication is skewed.

“Primarily, the only interactions there would be were with customers who were upset with shortcomings (of the product), which tends to lead you to biased view of your customer base,” Traynor says. “When the only feedback you get is negative, it’s not great for organization. Your natural inclination is that if that feedback is bad, then all of your customers think that, too. And that’s not the case.”

So they built Intercom, a simple, lightweight way for companies to connect with their users in personal ways. And through the process, Traynor has learned a lot about the best—and worst—ways to approach customers when it comes times to seek feedback.
More specifically, Traynor says, customer feedback is oxygen for the future of your business. So how do you establish a stable connection to that oxygen supply?

“One thing that’s very true is when people talk to Intercom, they feel like they’re having a conversation,” he says. “As opposed to when you’re talking through a survey or ticketing product, it feels like they’re more freely willing to have chats when it’s an actual person.

“I think it’s that there’s more of an honesty that comes when they’re talking to a person, instead of rating on a scale. I think it’s viable to extract feedback from conversations in that way.”

But before you even reach out to customers, Traynor says there are a few important things to keep in mind.
Chapter Ten: How to Collect Customer Feedback That’s Actually Valuable

1. Start Small

“Oftentimes when you do it right, the release itself can feel anticlimactic because it’s been so gradual.”

At Intercom, a group of trusted users serve as a testing group for new products and software iterations. After the development team and then the rest of the company finishes testing a new product, they roll it out to the team of testers. These are “good, active users who are happy to accept new features that might not end up shipping or whose behavior changes after a few iterations,” Traynor says.

When it comes to finding that group for your own company, what you want to do is start small. For example, Traynor suggests starting with 600 people instead of 6,000 to condense your feedback pool.

“You don’t want to scale the part that’s messy, you want to do the bit that works,” he says. “You’ll see things like where the documents are stored aren’t clear or users don’t know what a label means. Any of those problems, they don’t get better with size. You don’t need 100 test people and have half of them come back asking what \textit{merge} means. You just need five.

“This is where feedback is great because it helps smooth the path. People are able to just start using it straight away because you already asked 600 people who were a reflective sample.”

That way you won’t get hundreds of people asking, “How does this work?” come the product’s actual release because you ran through those problems with a smaller sample.

“Oftentimes when you do it right, the release itself can feel anticlimactic because it’s been so gradual.”

Similarly, in an Intercom blog post titled “\textit{Start with a Cupcake},” Traynor uses the analogy of baking a wedding cake to talk about
the importance of starting small and approaching feedback as a constant process.

The classic way people think about baking has them focusing on the individual ingredients, each of no value to the end user. You can deliver the base first, then the filling, and finally the icing. Only at the end of the final phase do you have something edible; something you can learn from.

Alternatively you could start off with a cupcake. You’ll learn the flavours you like, uncover any problems in your kitchen, and in general you’ll fast forward the feedback loop. You can then step up to a regular size cake, safe in the knowledge your ingredients are all fresh, your oven works, and your flavours are nice. Only then can you deliver a wedding cake.

The key difference in approaches here is how quickly you get feedback.

In short, sharing specific upcoming product features with customers to garner feedback yields no value. Instead, share a lightweight
version of the pending product update that gives your customers a real taste of what’s to come.

2. Find the Right Type of User

“The worst thing you can do is communicate with all of your customers at once or do something like say, ‘Hey, we’re taking feedback,’” Traynor says. “That’s unqualified feedback. You’re mixing in long-term, passionate customers with people who signed up yesterday because they saw you on Product Hunt.

“As one of my colleagues says, you might as well read the comments on Hacker News for your product strategy. That type of feedback
doesn’t help you think about what inputs need to drive your business.”

So when it comes to finding the feedback that does help drive your business, Traynor says it’s important to focus a similarly small, focused pool of users. For example, if you take a company’s developer wanting to explore potential product issues, Traynor says conflicts typically stem from three main problems:

- There aren’t enough people using a feature
- People don’t know about a feature
- People are using a feature but it’s causing them frustration

Let’s focus on the first option in the context of Intercom: “If there aren’t people using a feature, talk to them about why they aren’t using it.”

Maybe a user hasn’t generated any reports using Intercom. Traynor suggests reaching out to further explain how the feature works and how the reports are generated, followed by an inquiry into why they haven’t explored the function. Not only will this help you discover problems users may be running into—”I haven’t created any reports because I need to export them as Excel files”—but it also allows you to assess any untapped consumption for your product. So in this case, maybe that user would be willing to generate reports using Intercom if they were able to export them as Excel files.

“In that case, they’re ready to use the feature, but you just need to remove that barrier for them to do it,” Traynor says.
3. Don’t Confuse Quality Assurance with Customer Feedback

It’s rarely the case that companies don’t communicate with their users at all. But often, Traynor says he’s seen quality assurance emails or surveys confused for customer feedback. Though there’s still value in doing quality assurance, he says it’s not always the most important way to connect with your customers.

“The bigger question is: Have we understood the job we’re trying to do well and have we designed a feature that mirrors or supports our users’ workflow?”
Traynor says one of the biggest lesson he’s stressed goes back to focusing on the right users. He references a variety of objective metrics for customer satisfaction that, while they can be flattering, don’t mean much when it comes down to extracting value feedback.

“They’re great ways to find out whether or not your product meets that metric, but it doesn’t tell you anything you’ve missed. There’s not any extra info on how to make a score of 8 into a 10,” Traynor says. “You’ve no good data on this and its such a blended number—taking in your angriest and happiest customers with those who used your product once and forgot about it.

“Product teams don’t work on a product as a whole—they work on pieces—and that’s what your feedback should be focused on, too. The biggest lesson is only talking to the right people.”

4. Remember, Environment and Context Matter

Sure, you can spend hours crafting a survey to email to your users and have it land in their inbox on Friday night. Let’s say it’s just four relatively-quick questions. Even if you phrase your questions correctly and target a smaller sample, you’re probably not going to get the responses you’re looking for.

Put yourself in the shoes of the customer who just received the feedback email. Maybe you see the survey when it arrives in your inbox that evening. On Saturday morning you revisit the email. You enjoy using the product and don’t want another thing to worry about come Monday morning so you decide to respond quickly. Surely some feedback, even if delivered hastily, is better than no feedback at all, right?

Traynor isn’t so sure.

Let’s imagine a different scenario. This time while you’re already using the product—let’s say it’s a web app—when a sidebar with a photo and name of a real person who works at that company pops
up. Instead of emailing you the survey, you’re asked the four quick questions on the spot. The difference?

“Your response likelihood and response quality is infinitely better if you talk to users about something while they’re doing it,” Traynor says.

“If you consider me giving feedback to Google Hangouts right now while I’m using it versus me talking about it yesterday during the Seahawks game, I’m going to be much more committed to helping make Hangouts better right now.”

Especially if you can touch on a pain point that a user might be having, reaching out at a more opportune time could mean the difference between a thoughtful, quality response and a half-hearted answer to a survey.

“Feedback should be conversations, not structured forms,” he says. “Asking at the right time and in the right place is much more meaningful.”
6 Tips on Asking for Feedback

So you’ve done your research and determined the subset of users you want to ask for feedback. What do you do now? Traynor shared with us some of his most practical applications when it comes to forming questions and communicating with your users.

1. Start with the End in Mind

“Never ask a question that no matter what way (answered) won’t help you get to your end goal,” Traynor says. “Always start with the end in mind.”

For example, if you’re trying to figure out how to improve your product’s comment feature, don’t ask questions like, “How often do you use Intercom?” that don’t drive that purpose.
Traynor stresses that when you sit down to write a set of questions you have to ask yourself, “What types of responses will help me solve this problem?”

2. Avoid Dead-End Questions

This is a pretty easy one: Steer clear of any questions that are overly simplistic or could be responded to with a one-word answer.

“For example, if you ask, ‘Are you happy with Zapier?’ It’s easy to just say ‘yes’ and there’s no future to that conversation,” Traynor says.

Instead, he recommends sticking to a tried and true reporter trick: ask questions that lead with “who,” “what,” “where,” “when,” “why” and “how.” It’s an instant boost to quality responses.

3. Don’t Couple Independent Questions

Traynor says it sounds innocent enough to ask, “How fast and reliable is Intercom?” But really you’re doing yourself a disservice.

“On the surface it sounds like a perfect question to ask but it’s actually two questions. So both should be individual items,” he says.

He likens the phrasing to asking someone, “Do you eat healthy and exercise?” While those two actions are oftentimes closely associated, you can exercise and eat terribly, and inversely, you can eat great and never exercise.

If you have two different features, it’s two different questions. Period.

4. Provide Meaningful Timeframes

Going back to our exercise question, if you ask “Do you exercise?” chances are most people are going to say “yes.” But that still might
not be the most accurate representation of your data set.

“Because no one really likes to exercise, but you’re supposed to say you do it,” Traynor says. “But if you say, ‘In the past week, how many times have you exercised?’ it cuts through a lot of the bulls—t because it’s going to be zero from a lot of people.”

By phrasing questions around meaningful timeframes you get a better idea of users’ behaviors when it comes to using your product.

5. Ensure Your Users Feel Qualified to Respond

“A lot of times people feel too humble to suggest they might have something valid to contribute,” Traynor says. “So if you ask, ‘What should we improve?’ People will think, ‘I don’t know. You’re the expert who built this really amazing product.’

“Instead try something like, ‘In your opinion as a new user,…’ Always make users feel comfortable with what they’re trying to say.”

6. Avoid Hypotheticals

The truth? Your users don’t know what the future holds. Neither do you. So it’s really not going to benefit you if you ask them to speculate.

“Say you ask, ‘If our product cost $49, would you subscribe?’ Well, our product has never cost $49 so it doesn’t matter,” Traynor says. “It’s not a behavior question and to treat it like a data source doesn’t help you at all.”
Finally, Treat Feedback Like a Hypothesis

Now that you’ve collected feedback, talked to users and filtered out many of the anomalies that occurred, take a deep look at that pool of data and start clustering it into groups.

“Say your goal is to start providing features or support that larger companies want,” Traynor says. “If that was your strategy for the month or the quarter, you would want to find slices of feedback along those parameters. You segment that data, but in accordance with your strategy, and to prioritize that you can use simple tactics.”

Traynor says you can find relatively informed opinions and trends within your structured and unstructured data by clustering samples.

“If you do all that, you’ll end up with six or seven key points, but a point I always make is a pearl of information or an anecdote is not data and data is not direction,” he says.

For example, if you have 20 people out of 70 say you should be able to modify something within a particular feature, Traynor says that’s indicative that a change might be to your benefit. But before you go and make it the most important project of your quarter, he says it’s important to validate it.

“Sometimes it makes sense to (make those changes), but you have to realize those findings are only ever a hypothesis,” he says. “You almost have to act like a detective and say, ‘It seems like this is true, how do we verify it?’”

So maybe you go back and ask another 200 people a quick, focused question to see if the trend resonates with a larger segment of users. Traynor says this will help you validate that a need exists and supports your hypothesis that a change should be made.

All hypothesizing aside, Traynor still believes it’s important to trust your gut too when it comes to your product’s direction.
“It’s worth saying that if you really know your product and customer base you can bypass a lot of this if you have a good feel of what you’re trying to do,” he says. “Inevitably as the product grows though, you’ll begin to attract people less like yourself who may not fall into that area.”

Even with all the improvements you could possibly make to your product, you’ll still need to help some customers. But don’t wait for them to contact you—get in touch first when it seems like there’s a problem, and help them before they think to ask for help. That’s the idea behind proactive customer support, which you’ll learn how to implement in our last chapter.

Written by freelance writer Megan Bannister.

Image Credits: Suggestion box photo courtesy Andrea Williams. Des Traynor photo via LinkedIn. Intercom graphics from the Intercom blog and Intercom.io.
Chapter Eleven: Start Preventing Fires: How to Implement Proactive Customer Support

If we are to understand how we can provide better support for customers, we must first agree on a definition of customer support. In my view, customer support is the customer experience during normal interactions with a business, not only when problems arise. It’s about viewing the experience through their eyes, serving up solutions and interactions that WOW customers. This approach is known as proactive support.

Many businesses, unfortunately, define customer service as their response to problems as they arise, which is called reactive support. Though that method might satisfy your customer in the short term, it doesn’t optimize their overall experience with your brand.
Fire Prevention is Better than Firefighting

In customer support, you’re often faced with unpredictable issues. Being chronically reactive to those issues creates stress and anxiety for you and your team. Overtime, it lowers morale and starts to have an impact on your company culture. Putting your team’s focus on shipping new features instead of fixing bugs and improving support tools is a recipe for disaster.

When you are spending all of your time trying to respond to angry customers, you become a firefighter, so to speak. Firefighting can be essential during a rush, or as part of a short period of change. However, if it becomes common practice for your support team, it can have serious implications. Support teams need to move away from the notion of firefighting as the norm and start thinking of themselves as guardians of the customer experience.

To provide an excellent customer experience, a business must practice proactive support and stand behind its principals. The goal
of proactive support is exactly the opposite of reactive support. Proactive support requires identifying and resolving issues before they become problems and involves identifying ways the customer experience can be enhanced without the customer having to ask for it.

The process of proactive support is made up of essentially six different levels of proactivity, as explained by Bruce Temkin on the Customer Experience Matters website.

Unfortunately, some companies are at the very bottom, where they’ll find themselves in the “react stage”—taking action after a problem occurs. From that stage, the level of proactiveness increases. Using this pyramid as a guide will help you identify the level of proactivity where your company falls, enabling you to take the steps needed to improve.
Proactive support can also help a company’s bottom line. If you solve problems before customers reach out to you, or if you address issues before customers are aware of them, it’ll likely reduce help desk costs and contribute to building customer loyalty and increased revenue.

How to Implement Proactive Support

Small Steps

Social Media

Offer support through social media. Customers complain and (most of the time) they aren’t complaining directly to you, but they will turn to social media to share their thoughts with the world. Because of that, monitoring what people are saying about your company through social channels and actively responding is an important step.

There are also going to be situations where customers aren’t complaining, but rather they might be confused or looking for more information. That’s why it’s critical to monitor these channels and listen to what customers are saying so you can reach out to them to provide help before they add another ticket to your support queue or worse, before you lose them as a customer.

Here’s a tweet that Buffer, a social media sharing tool, picked up on, even though it wasn’t directed at them.
To which they responded:

**Honest Communication**

Customers know or will find out if/when you’re lying or hiding something, so don’t do it. Always be transparent with them and don’t be afraid to let them know you’re having a problem. Hearing about a security breach or a bug directly from the company will always be better than a customer realizing the issues themselves or from another source. This type of transparency isn’t just beneficial to provide great customer service though, it can be a business practice, as well. With open and honest communication, customers feel appreciated, respected, in the loop, and are less likely to get angry towards a business.
Hudl, a sports tech company, refers to its honesty policy as being “respectfully blunt”.

On Software Advice’s Customer Service Investigator blog, Kristen Hicks recommends the following honest communication tips if something goes wrong.

- Alert customers to the issue and offer an apology
- Offer a discount on a future purchase, or provide a refund if the action you take to fix the problem doesn’t satisfy their needs
- Tell them what you’re doing to figure out a solution and ensure the problem doesn’t happen again
- Make sure they know who to contact if they have further questions or feedback

Traditional Communication

When you notice a customer is slipping away, check in with them personally through an email, phone, or even a handwritten note
and ask how they’re doing, even if it’s an automated email based on certain customer criteria (I’ll get to that in a bit when I talk about usage metrics). You can also check out Chase Clemons’ “4 Easy Ways to Say Thanks”.

Stride, a CRM app, sends customers thank you notes that say: “If you ever need anything, give us a holler.”

Self-Help

Having a support center or knowledgebase with product articles and tutorials so customers can get the answers they need right when they need them offers a high level of convenience and reduce tickets into your helpdesk.
Zendesk’s support center directs a customer to appropriate resources while offering an abundance of information and timely updates without making the user feel overwhelmed.

Support Driven Development

When only one person on your team is aware of an issue, the urgency to fix it is reduced. Having all team members take part in customer support and having your developers focus on providing better support tools, allows the support team to handle tasks more conveniently and provide faster solutions for customers. All-hands support isn’t just about engineering a better product and improving internal tools, it’s about “engineering your organization to improve customer insight,” says Ben Congleton, CEO of live chat software Olark.

Here are some tips Congleton shares in his talk at UserConf 2012 as a result of implementing an all-hands support approach:

- Your entire team will have a much better understanding of your customers and your product.
• Engineering becomes motivated to engineer, to reduce support and to build better internal tools.
• Whenever you put the product team in front of support, you’ll find the product will improve because there will be more knowledge throughout the entire organization about what the problem that you’re really solving is.
• A strong culture of customer service is built across the entire team.

He also provides a few tips on how to provide simple opportunities for the entire team to spend time supporting customers. Here are some examples he uses from companies like WePay, Wistia, and New Relic:

• Add developers to a support rotation
• Allow others to listen in and view support conversations
• Use support as a tool for new hires to learn the product
• Reduce new hire costs by having more team members do support

Practicing an all-hands support approach aligns the goals of all employees and gives everyone a better understanding of the customer and the ways in which they view your product.

**Big Steps:**

Taking these next steps means measuring customer activity and paying attention to how they’re experiencing and using your services.

**Start Tracking Customer Actions**

You can’t base everything on number of logins. You need to know how your customers are using your product. You need to track usage
metrics, segment your customers using those metrics, and create autoresponder based on those segments. Those metrics should influence how often your customer support team is proactively reaching out to customers.

Intercom allows you to proactively engage with customers inside your app.

Use an analytics tool like Intercom or MixPanel. These apps act as a CRM, marketing tool, and support tool based around the premise of proactive customer support. They let you segment customers, track their activity, and enable you to connect with them based on certain criteria you define. This allows you to do a few cool things:

- Identify high-usage customers and thank them for their loyalty
- Identify low-usage users and reach out to help keep them on board
- Identify users who are slipping and catch them before they fall and it becomes too late to win them back as a customers

Identify Trends
When you start tracking and analyzing certain metrics, you’ll find you may discover trends such as areas of success where things are working really well and other areas where your customers are running into trouble. Customer types and usage patterns start to emerge, which allows you to make better decisions on how to better support your customers. Implementing an analytics platform will help you put processes in place to alert you of minor issues before they become big problems and allow you to automate and implement appropriate re-engagement attempts.

**Proactive Support is Support Done Right**

Customer support influences just about every aspect of your business. Moving to a more proactive approach can benefit all areas of your company and open a plethora of opportunities for improving your product or service, increasing revenue, and offering an exceptional level of service to each and every customer.

You’ve done it! You’ve learned how to provide great customer support, found an app that’ll help you do support better, and learned tricks to minimize the number of support tickets you’ll need to answer. Now, all that’s left is to start putting what you’ve learned into practice, and improve your company’s customer support.

First, though, we have some extra resources for you, to help you offer the very best customer support possible.

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Written by Zapier People Ops Lead Jess Byrne.

Appendix: Additional Resources from Zapier

No matter which app you use and regardless of the number of tricks you rely on, support will still be a difficult job at times. There will always be edge cases, things you never anticipated being a problem that suddenly are overwhelming your team. You’ll have trouble with your app, will need to refine your documentation, and once in a while will need to catch your breath.

Our guide to customer support can’t cover everything, but we do have a few more resources that may help. Be sure to check them out—and follow the Zapier Blog for more articles on support, productivity, best apps, automation and more.

**Support Roundtable: Pros from Five Apps Talk Tone, Tools and Traits of a Top Hire**

Learn more about tone in support messages, ways to measure user happiness, and traits to look for in support hires from customer support leads at Buffer, FreshBooks, Help Scout, Trello, and Zapier. You’ll also find links to articles on how to handle feature requests,
minimize customer confusion, respond to error and data loss, and more from previous support roundtables.

**Learn How InVision Built Their Support Team**

Starting to build your support team, or need ways to quickly grow your existing team? Learn from InVision team on how they built their support team—with tips on working remotely, finding people that work well together, and ways to tier support to make things easier on your team while giving customers the best support possible.
More Ways to Automate Your Support Tools

101 Ways to Use Zapier

Looking for more Zaps to help out your customer support efforts? Our 101 Ways to Use Zapier includes a whole chapter on customer support Zaps—plus hundreds of other ways to automate every other part of your business.
Building a remote support team? In this eBook, Zapier CEO Wade Foster will walk you through how to build a remote team, keep everyone motivated, organize successful team retreats, and more.
Connect Freshdesk to Your Favorite Apps

Need help setting up your new customer support app? This screencast will walk you through how to setup Freshdesk to other popular apps, to bring in tickets, notify your team, and more. Even if you’re not using Freshdesk, it’ll give you tips and ideas that’ll help you get the most out of your favorite support tool.
Optimize Your Gmail Inbox with Zapier

Whether you’re using Gmail for customer support, or just need tips on keeping your email inbox—or support inbox—clear, this screencast will give you the tips you need to never get overwhelmed with email again.

There’s more, too. Be sure to check out the archive on the Zapier Blog for more resources, or check out the other free eBooks on forms, CRMs, email marketing and more in the Zapier Learning Center.

Thanks for reading!

Signup for a Zapier account today to connect your apps, automate your tedious tasks, and do support—and everything else—better!