



How can Zoho Desk help your business?



Instant Messaging

A woman wearing a headset and glasses is shown from the chest up, gesturing towards a laptop. The laptop screen displays a "User Personalization" interface with three buttons: "Zoho Puvi", "Lato", and "Roboto". Above the laptop, there are icons for various messaging channels: a blue Telegram icon, a green LINE icon, and two green WhatsApp icons. A central server rack icon is connected to these channels and a small orange robot character.

Guided Conversations

A chat interface showing a conversation flow. At the top right is a circular profile picture of the woman from the previous image with the text "Hi!". Below it is a question box: "What can I help you with?". Underneath are two buttons: "New order" and "Existing order". The "Existing order" button is selected. Below that is another question box: "Which item do you need help with?". Underneath are three buttons: "#32012", "#40010", and "#48909". The "#48909" button is selected. At the bottom right, the text "#48909" is displayed. A small orange robot character is positioned at the bottom of the chat interface.

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Introduction

While business and economic conditions continually change, one thing remains constant: customer loyalty. As you know, earning a customer's trust takes time and persistence, but it's an investment that pays off when storms roll in. This is why it's crucial to prioritize customer service—the most critical part of the customer journey.

To serve customers effectively in today's world, businesses rely on customer service software, which improves agent-customer interactions, reduces wait times, and increases customer and agent happiness. But a software tool shouldn't become a roadblock as expectations change; you need one that adapts to change and thereby eliminates the need for additional applications or a complete overhaul.

Get ahead of the curve and discover in this ebook what your customers and service reps expect in today's world. Learn how Zoho Desk—a customer service software solution—can help your business meet the changing expectations of your most important stakeholders.



Operate within your customer's world

In today's digital world, every time a new technology is introduced, customers want to get their hands on it. And sometimes, some applications become an essential part of people's daily lives. Take email, for instance.

To ensure that a brand's voice reaches its audience, businesses have begun shifting their attention towards these new applications, even for customer service.

Nevertheless, not all customers prefer a single channel for communication. To meet their diverse needs, businesses often rely on multiple applications, which often produces a disjointed experience. As such, today's customer service leaders naturally advocate that businesses provide omnichannel experiences in order to exceed customers' expectations and gain a competitive edge.

What is an omnichannel experience?

In simple terms, an omnichannel experience is an integrated experience for your customers that offers convenience and a sense of value. Imagine, for instance, that you've left a chat conversation with a business mid-way through. The next time you contact the business—even if it's over a call instead of chat—the business picks the conversation up from where you left off without you having to repeat the same questions. Ultimately, omnichannel support provides customers with a singular, easy, and coherent experience across channels.

Does that sound similar to a multi-channel experience? While multi-channel support allows customers to reach out on a variety of platforms, the interactions take place in isolation. With Omnichannel, interactions across channels are unified on one platform, where service agents can gain essential context to address customer needs.

Customers' expectations for an omnichannel experience:

- [72% of customers expect businesses to know their purchase journey, regardless of the platform used.](#)
- [69% expect consistent service across channels.](#)
- [38% expect agents to know their details before they reach out.](#)

Business and omnichannel gains

- [4 times more customer loyalty.](#)
- [47% higher NPS score.](#)
- [8% higher CSAT Score.](#)

If you are already using Zoho Desk, you must be familiar with the various channels supported by Desk—email, web forms, phone support, live chat, and social media—for customer service. As your customers gravitate towards tech-savvy solutions, Desk helps you retain the human element in every conversation. Desk gives you more context by providing you with one platform that unifies all your customer interactions from across channels.

Why should you expand your omnichannel offerings?

Clearly, there's high demand for the omnichannel experience, but your customer's preferences for these channels are evolving. Let's take a look at [McKinsey's digital experience](#) report, which categorizes customers into four personas based on their digital behavior.

23%

Digital by lifestyle

Individuals that have the digital world ingrained in their lives.

35%

Digital by choice

The ones that have consciously chosen to include digital in their lifestyles.

25%

Digital by need






Those who use digital experiences only when necessary and not by preference.

17%

Offline society

Far way from the world of digital experience.

Your customers are heading towards a digital world, whether by choice or by need. And messaging apps have become a crucial part of their digital life to meet their daily communication needs. Here's the data to substantiate this:

Messaging platform	Total number of users	Popular in countries
 WhatsApp	2.4 billion	India, Brazil, Indonesia, United States, UK
 Facebook Messenger	2.1 billion	United States, Canada, India, Brazil, Indonesia, UK
 WeChat	1 billion	China
 Telegram	500 million	Central Asia and the Middle East
 LINE	178 million	Indonesia, Japan, Taiwan, and Thailand

Source: [Business of apps](#)

According to [research by Forrester](#), messaging apps have ranked second in usage for customer service among the five main channels.

Phone support is still popular due to its instantaneous service, but modern customers prefer chat over phone calls. This may be due to phone calls having long wait times and restricting their ability to multitask, unlike messaging apps.

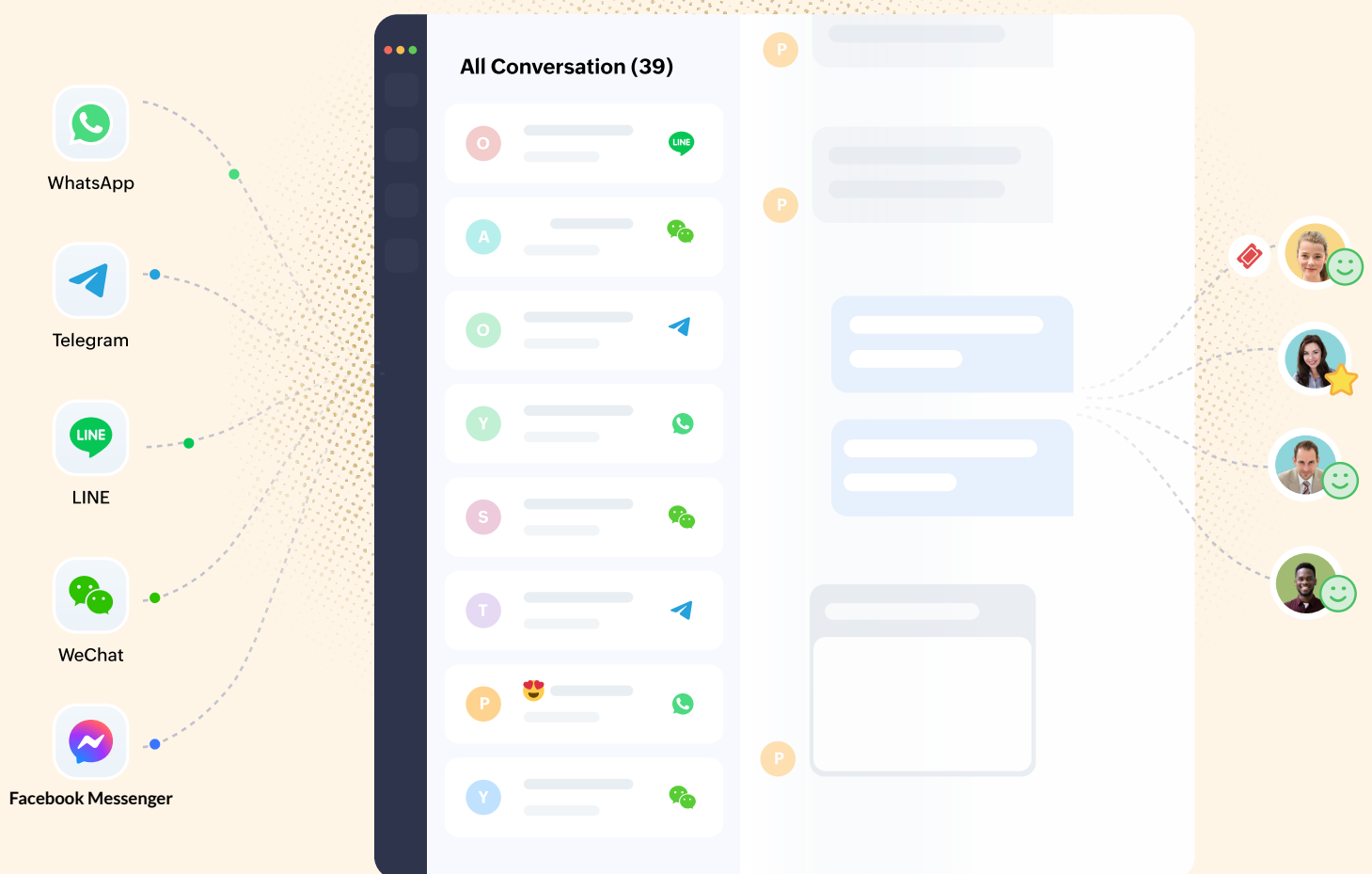
While email is an effective communication channel that allows customers to message at their convenience, responses are not instantaneous, and follow-up contact can be difficult to keep track of.

Live chat helps prevent long wait times and offers real-time communication between customers and agents. But it has a closing time, and you cannot pick up a conversation from where you left off.

Instant Messaging is the answer to your growing omnichannel needs

When we say “expand your omnichannel offerings,” we are not just talking about adding a new channel of communication, but also providing an integrated, personalized, and humanized experience on all the channels your customers use.

Zoho Desk’s instant messaging tool helps you prioritize customer convenience and agent happiness and saves your agents from the hassle of managing multiple applications. It achieves this by seamlessly unifying interactions across customers’ favorite channels—WhatsApp, Facebook Messenger, WeChat, Telegram, and LINE—in one place.



Here's how it works:

To make it effortless for your customers to reach you through their favorite messaging apps, you can embed a QR code or a messaging button, or link it directly on your website. We understand that managing a new channel alongside existing ones can be challenging for agents, but IM makes it seamless by unifying interactions across channels in one place. Additionally, here are some more things IM makes possible:

Here's what's possible with IM:

Smooth operations:

According to [Forrester, 50% of support leaders](#) say that their agents spend most of their time switching between apps. With a separate module for messaging called the IM module, your agents get to use different messaging apps from one place. All questions are delivered to a central location and you are notified as they arrive. In instances when the flow of tickets is particularly high, you can assign your tickets to other agents. This ensures every customer request is attended to with complete and prompt attention. Agents can easily adapt to the UI, because it resembles the messaging apps they use in their daily lives. Plus, with the profanity management feature that allows you to block abusive customer interactions, you create a safe environment for your agents to work in.

Improved engagement capabilities:

Customer communication is not limited to words, which is why the reply editor in IM helps you share articles, images, files, and emojis to make conversations more interactive and meaningful.

Increased efficiency:

Real-time communications need to be quick and informative. Your agents can send [canned responses](#) or auto responses for effective and fast communication.

More context:

Every detail about the customer is essential. Conversation details, contact info, and even the files shared during an interaction, all made available in one frame, can help your agents communicate more effectively.

Proactive service:

Sometimes your customers expect updates even if they're not the ones to initiate a service request. For such instances, you can send customized messages proactively with WhatsApp templates.

Easy management:

The [IM dashboard](#) gives you insights into the number of tickets received through different channels, the number of incoming and outgoing messages exchanged, agent metrics, and other KPIs. These can help you further understand which channels to assign more agents to and the type of questions they can expect to receive.

How do we make it easy for you to adopt IM?

Native integration with Zoho Desk

With IM, you don't have to worry about depending on third-party integrations to connect messaging apps with Zoho Desk. We provide native integrations with [WhatsApp](#), [Telegram](#), [LINE](#), [Facebook Messenger](#), and [WeChat](#). This brings its own set of benefits, which are explored below:

Usability: With native integrations, information flows smoothly between the messaging platforms and your customer service software. All data is stored in one place, and can be accessed and utilized to provide personalized services to customers.

Privacy: Any changes in the privacy regulations will be addressed immediately by your vendor. When multiple parties are included in your operations, there is usually a delay in the implementation of privacy laws and policies. Now, this can be avoided.

Updates: Similarly, any API updates typically require action from a third-party vendor. But with native integration, API updates are addressed by your software vendor. This essentially eliminates delays in the processing of information.

Pricing: Dependency on third-party integrations calls for additional pricing. With native integration, you can cut down on the unnecessary costs and solely focus on customer service.

Manage payments within Zoho Desk

Zoho Desk won't charge you for integrating messaging apps. But as we know, messaging apps charge based on different aspects. From a business perspective, keeping customer service activities, including payments, in one place can help you keep things organized. With the auto-recharge payment option, you can [manage payments](#) to messaging apps seamlessly.

Click on this [link to check out some commonly asked questions](#) about Zoho Desk. If you wish to proceed with the implementation, here is the [link that includes articles and videos](#) for easy implementation.

Let's take a look at what we've got for you in the realm of self-service.

Empower customers to help themselves

The offline world is buzzing with self-service improvisation stories. Everyday situations are changing the way we operate and what our customers have come to expect of us. Take, for instance, self-service checkouts. Retailers noticed an increase in foot traffic after the pandemic. This essentially meant there was a need for more in-store employees, but “readily available in-store talent” was difficult to find. But along with this, there was a change in the behavior and shopping patterns of customers.

They were looking for more self-service options because they dreaded long lines and long wait times. Retailers found a solution with self-service check-outs. This fixed the employment issue and increased customer happiness.

How does self-service work in the digital world?

A staggering [81% of customers want businesses to include more self-service options](#), while only 11% of businesses are making this a priority. Under these circumstances, only 15% of customers achieve satisfaction from self-service. Let's understand the reasons behind businesses' unwillingness to make self-service a priority and customers' low satisfaction levels.

Unmonitored self-service:

Businesses expect self-service to reduce the agent burden and run on auto-pilot. But when self-service is left unmonitored, you risk leaving customers dissatisfied with outdated and irrelevant answers, which can end up increasing the agent workload. With this you are incurring more costs than expected.

Lack of control for customers:

Another reason for customer disappointment is a lack of control in self-service. Often, customers don't get to choose the direction of their interactions with a business and find it difficult to switch between self-service options, deteriorating the quality of their experience.

Repetition:

This is another factor that kills customer happiness. When customers are asked questions about information they expect business to know beforehand, it distances them from the business and decreases their satisfaction levels.

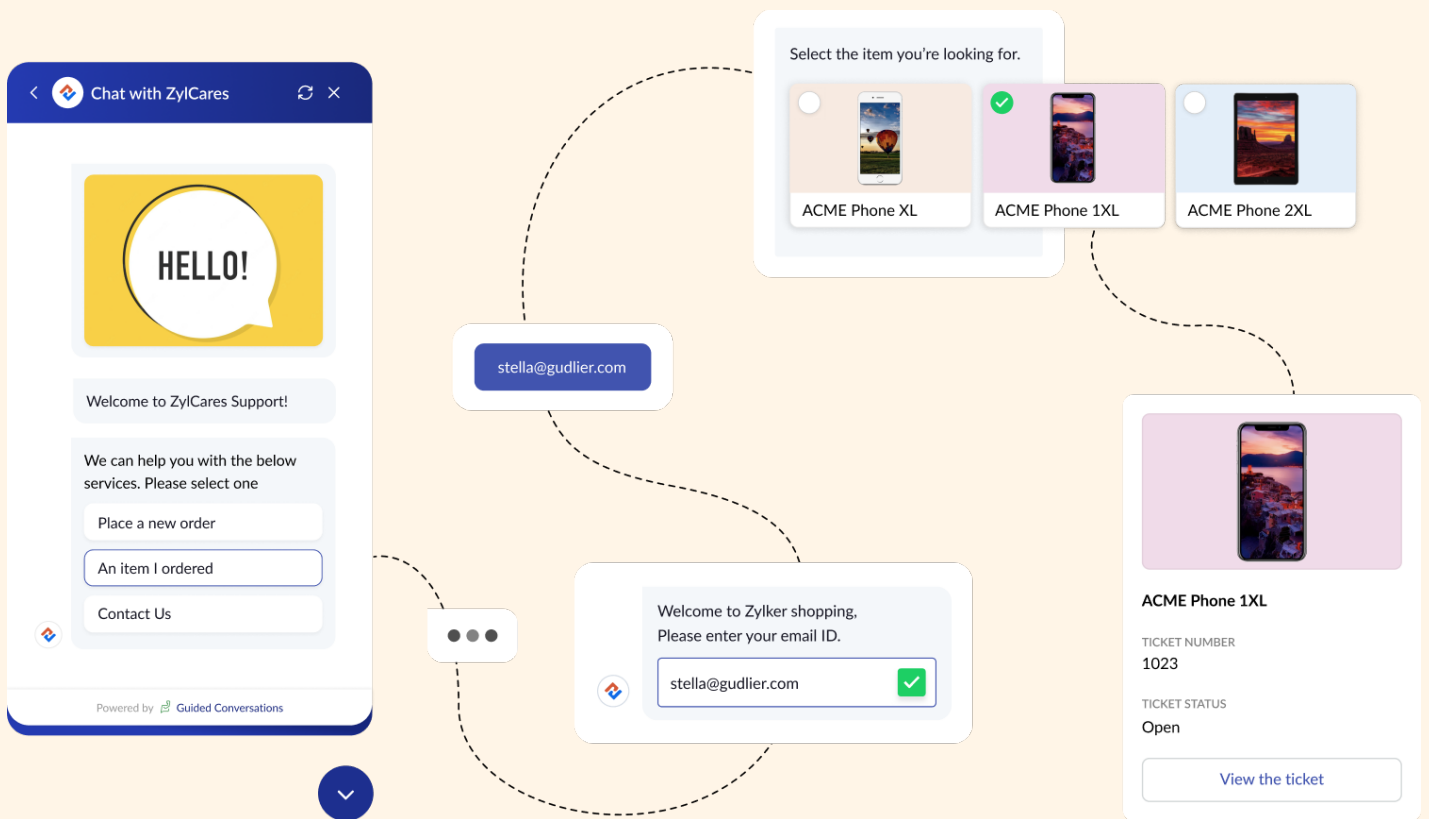
These are specific challenges to self-service. No one solution can fix it, and that's exactly what your customers aren't expecting either. They want more options to increase their chances of getting things done on their own.

Zoho Desk helps you provide the type of self-service options your customers want. If they are up for some reading to get the issue fixed, we provide a knowledge base, a storehouse of information. Seamlessly manage your Knowledge Base articles, get the articles reviewed, convert ticket resolutions into articles, or even get reminders to update the articles with a few clicks. If your customers are not up for searching, they can ask Zia questions and get all the information they need in no time. With Community, you can provide your customers with a platform to interact with other customers, raise concerns or ideas, and have discussions.

While information rules the world of self-service, customers are looking for more. They want to feel empowered. With Zoho Desk's new feature, Guided Conversations, you can equip customers to take conversations in the direction of their choice.

What is Guided Conversations?

Guided conversations is built to enhance both the agent and customer experience. It is a proactive, low-code self-service platform that empowers customers to find answers, handle tasks, and do more without depending on agents. It also serves as an assistant to agents, reducing their workload by aiding in information retrieval and task execution. Freed from routine inquiries, agents can focus on complex issues and drive higher levels of customer satisfaction.



How does Guided Conversations work?

Perform quick actions:

In any organization, various teams handling different business processes work diligently behind the scenes. While not all of them interact with customers directly, customers nevertheless often have questions related to various business processes.

With webhook functionality in GC, Zoho Desk can retrieve information from connected databases, enabling customers to find answers and perform actions, like tracking order statuses, making payments, updating account details, and much more. Additionally, it serves as a valuable assistant for agents by swiftly retrieving requested information and ensuring precise and prompt responses to customer queries.

Here you can read a few [use cases](#) across industries to understand the potential of GC.

Industry specific use cases of GC

Financial services

- Request bank statements
- Take emergency actions, such as deactivating cards
- Make payments
- Enquire about the latest plans or nearest ATMs
- Apply for loans
- Claim settlements
- Access an investment/policies calculator
- View the latest advancements in wealth and asset management
- Update information

Ecommerce

- Make purchases
- Change passwords
- Make coupon-related inquiries
- View product catalogs
- Track orders
- Ask discount-related questions
- Return products
- Initiate an exchange
- Cancel orders
- Find offline stores near you
- Update orders
- Change delivery address

Education

- Extract student reports
- Submit assignments
- Review assignments
- Pay fees
- Ask course-related questions
- Book demo classes
- Renew online course memberships

Manufacturing

- Check the status of supplies and inventory
- Track orders
- Place orders
- Order changes

Healthcare industry

- Schedule appointments
- Book vaccine appointments
- Get reports
- Book tests
- Find nearby hospitals
- Check the doctor's availability
- Place medicine orders
- Access medicine schedules
- Ask check-up related queries
- Ask health-related questions
- Check the availability of particular medicines
- Make an insurance claim

Travel and tourism

- Check packages
- Book trips
- Book hotels
- Ask questions related to the destination
- Access a real-time guide
- Initiate refunds and cancellations
- Give feedback

Food and beverages

- Book tables
- Check menus
- Place food orders
- Make payments
- Issue refunds
- Give feedback
- Cancel orders
- Check nearby restaurants

Energy and gas

- Update address for services
- Make monthly bill payments
- Report meter readings
- Request invoices
- Change plans
- Update plans

Setting up is easy:

The backend setup of most self-service platforms can be overwhelming for a non-tech individual. But with GC, you can use a no-code GUI builder to create flows with the simple drag-and-drop option. [Blocks, paths, and variables are the components of GC](#) used for building flows and making conversations more human-like.

With blocks, you get to choose your content form to communicate with your customers. Make conversations more engaging by including images, emojis, videos, or text. This way, you make conversations more interesting and avoid the risk of miscommunication, which often occurs during open-ended bot interactions.

Not every conversation follows the same direction as the flows you've set. Paths help you respond to the uniqueness of your customer interactions. You can copy paths from previous flows or even delete the unnecessary ones, making flows more customer-centric.

A touch of personalization, even during bot interactions, can help to enhance the customer experience. Variables make this possible. With variables, you can collect essential customer information throughout the flow and avoid redundancy.

Further, you can embed these flows on different websites or make the QR code available across messaging channels for easy accessibility. Additionally, you can control the visibility permissions for the created flows.

Flexibility in communication:

Sometimes, even numerous flows won't solve your customer's issues, due to their unique nature. For this, we provide the flexibility for your customers to switch to live chat. They can also switch to a knowledge base right on the same page.

Enhanced performance:

Monitoring bot performance is crucial for staying attuned to your customers' needs. Flow metrics offer insights into bottlenecks or drop-offs within a flow, enabling you to make enhancements and elevate the self-service experience for your users.

More convenience:

Not every customer interaction happens in one place. Your customers might start a conversation on the web and switch to the phone due to situational conditions. GC offers them the flexibility to switch platforms and continue the conversation just by signing into the help center through the device in use.

Secure experiences:

Confidentiality of data is of paramount importance when handling important customer information. With [JWT authentication](#) in Zoho Desk, your customers can safely access information by logging into the business help center. This serves their purpose of self-service while maintaining security.

Bring self-service to the omnichannel universe

Wouldn't customers like to help themselves in the omnichannel universe? Definitely, yes! Integration of GC and IM helps customers get the best of both the self-service and omnichannel worlds. They can get things done on their own, even when using WhatsApp, WeChat, Line, and Telegram.

Say a customer wishes to update their shipping address. They visit your website, click on the WhatsApp link, and begin the interaction. With a few clicks, they can update their address—on their favorite channel, all on their own.

Enhance employee experiences



Retaining good talent isn't easy in a competitive market. Along with the physical workplace experience, the digital employee experience has become of crucial importance. Employees expect technology that promotes collaboration and boosts productivity. Of course, there are multiple technology touchpoints in an employee's journey with a company. But when their day-to-day role demands interaction with a specific software solution for long hours, it's essential that the solution is interactive and capable of supporting their needs and preferences. To ensure employee satisfaction, the all-new Zoho Desk is designed to be more user-friendly and accessible for all.

New UI

Your employees use software everyday to resolve customer issues and ensure high levels of customer satisfaction. A clean, user-friendly interface increases usability, and in turn, the quality of the service provided.

The all-new Zoho Desk is more interactive as your agents can change ticket statuses, mark tickets as read or unread, copy ticket details, and more from the Ticket Queue View without opening the ticket at all. The detailed contact view further facilitates effective communication with the color-coded distinction between private and public comments. The new UI also fosters your agents and managers to make effective decisions with detailed contact view and the latest headquarters view.

The new UI is clean, responsive, and easy to use.

old UI

The screenshot shows the 'old UI' of Zoho Desk. The interface is cluttered with a dark blue header and a sidebar on the left containing icons for 'Team Feeds', 'Views', 'Agent Queue', and 'Team Queue'. The main content area is titled 'All Requests' and is divided into three vertical columns: 'Low (10+)', 'High (4)', and 'Other Priority'. Each column contains a list of request cards. Each card displays a request ID, a title, the assigned agent's name and department, and the request's status and date. For example, in the 'Low' column, the first request is '# 1703 Zylker Travel website unresponsive' assigned to Amy at ZylCares, with a status of 'Engineering WIP' and a date of '04 Dec 2022'. The 'High' column shows requests like '# 1695 Hotels near city' and '# 1694 Visa application issue'. The 'Other Priority' column includes requests such as '# 1705 Extend my stay' and '# 1696 Maldives Itinerary'. The overall design is functional but lacks a modern, clean aesthetic.

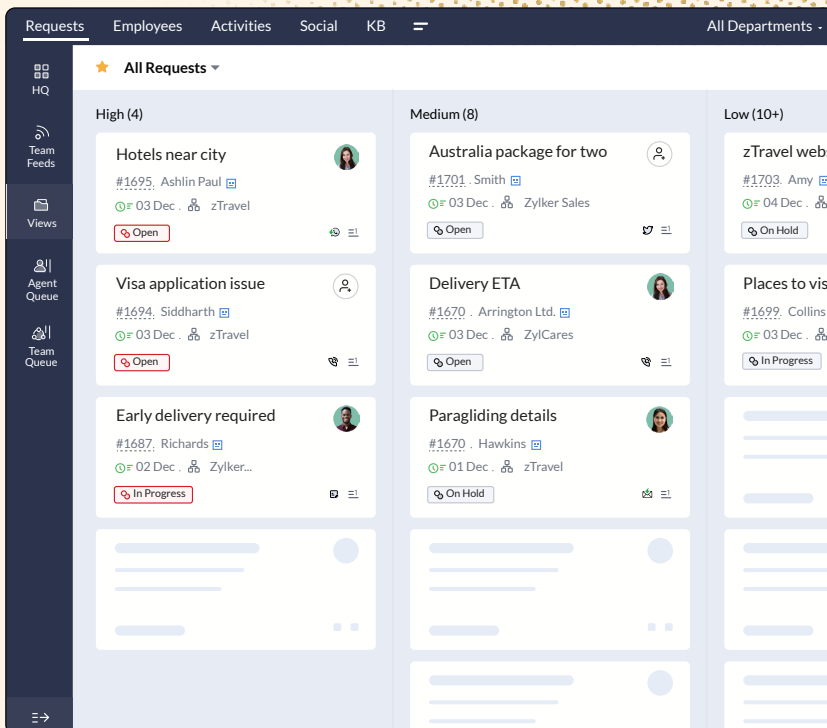
New UI

The screenshot displays the 'New UI' of Zoho Desk, which is significantly more organized and user-friendly. The header is clean with a 'Priority Mode' dropdown. The sidebar is simplified, focusing on 'Team Feeds', 'Views', 'Agent Queue', and 'Team Queue'. The main area is titled 'All Requests' and features a grid layout with four columns: 'High (3)', 'Medium (8)', 'Low (10+)', and 'Other Priority (3)'. Each request card is more prominent and includes a clear status indicator (e.g., 'Open', 'On Hold', 'In Progress') in a colored box. For instance, in the 'High' column, the first request is '#1695. Hotels near city' with a status of 'Open'. The 'Medium' column shows '#1701. Australia package...' with a status of 'Open'. The 'Low' column includes '#1703. zTravel website...' with a status of 'On Hold'. The 'Other Priority' column has '#1705. Zylker physical outlet' with a status of 'On Hold'. The new UI uses a light blue color palette and clear typography to enhance readability and ease of use.

User preferences

We all like to have things done our way. What do you do when you buy a new phone? You modify the look and appearance according to your liking. You are at ease with your phone once you have it your way. Similarly, getting to personalize your software makes you more comfortable with it.

Your agents can change the look and feel of Zoho Desk according to their preferences. They can change the display layout, set themes, choose the font type and size, change the editor font, and even switch to night mode.



Appearance
Choose the mode in which you want to view your helpdesk.

Light Mode Night Mode Auto

Make left panel light

Theme
Select the theme to be applied to your helpdesk.

Red Green Blue Yellow Orange

Display Layout
Choose a layout that is optimal for your screen resolution.

Full Width

Display Font Type

Zoho Puvi Lato Roboto

Display Font Size [Reset](#)

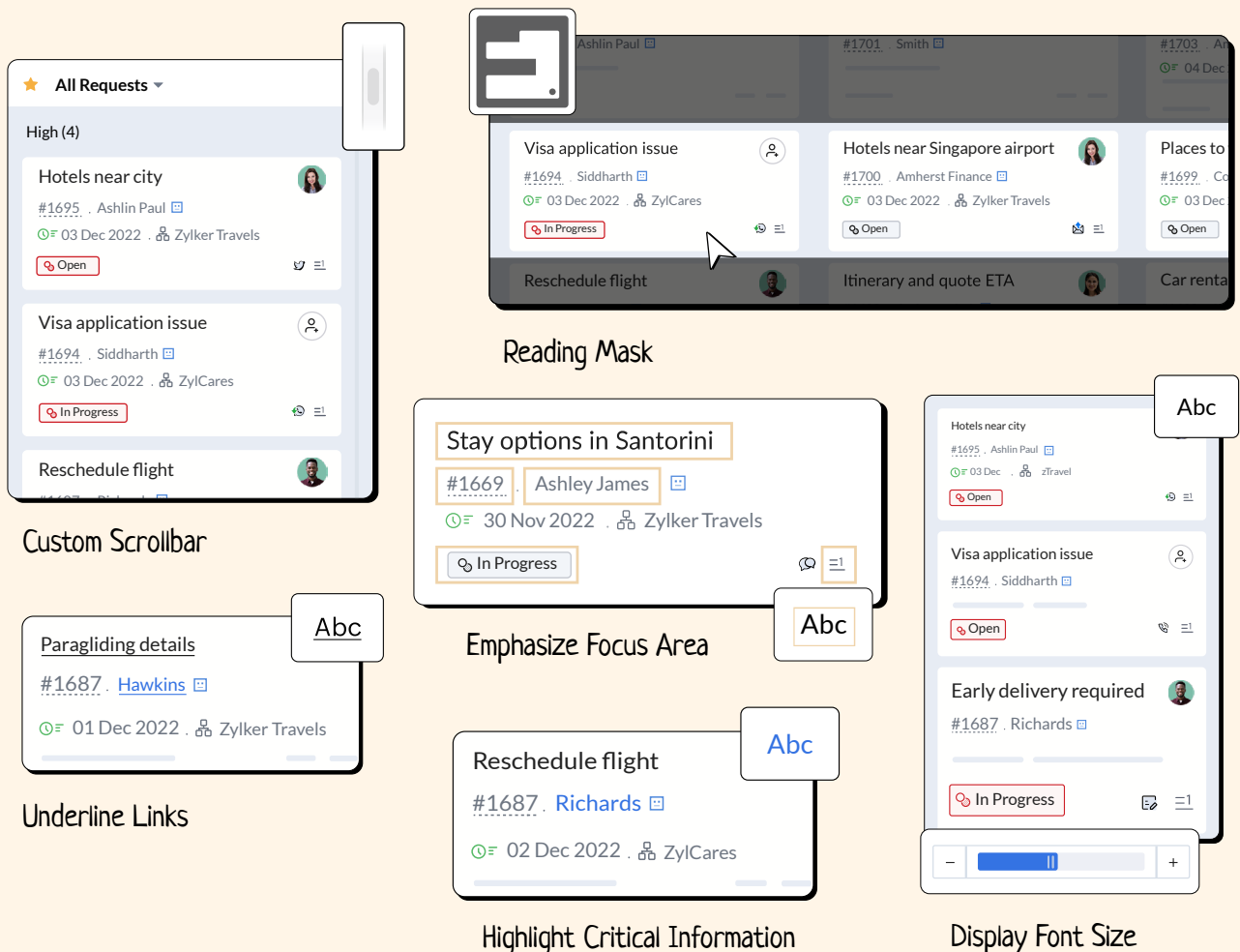
Aa Aa Aa

Default Editor Font
Select the default font type and size for your email description and reply editors. >

Personalize Reply Button
Select the reply actions you want the button to display by default. >

Digital accessibility

Digital accessibility promotes inclusivity, and refers to providing users of all abilities the same ease of using software, web-based applications, and mobile applications. In a working environment where digitization is prevalent, we need to be mindful of providing the same convenience and ease to everybody who uses the provided technology. Only when users can interact with their software tools easily will they be able to perform tasks quickly and effectively.



Zoho Desk has included accessibility controls to make it easy for agents of all abilities to have a seamless experience.

Let's take a look at the new additions:

1

Cognitive disability refers to the inability to comprehend and view information along with other processing difficulties. People with cognitive disabilities, like dyslexia, can use a display layout that allows them to adjust the appearance of the screen. By highlighting critical information, like ticket ID, ticket color, contact details, and underline links, users can more easily read and understand the information they are provided.

2

At times, difficulty in concentrating can get in the way of the effective performance of an individual. To help stay focused, your agents can turn on Emphasize Focused Areas, which highlights information by adding a border around it. For distraction-free reading, your agents can use reading masks that help them focus on the text they are reading while masking the rest of it.

3

Often, animated content with flashes and fast movement can affect individuals with seizure disorders. With animation controls, your agents can control the transitions and animations within Zoho Desk.

4

Visual impairment has been a rising concern, and can take the form of low vision, color blindness, and blindness. With the Display Font Size option, your agents can adjust fonts as needed. Zoom levels can be changed for easy viewing. Differentiating color spectrum makes software difficult to access for people with color blindness, but with Zoho Desk, agents can adjust the screen brightness and change themes for clear visibility.

Provide secure experiences

No amount of personalization would suffice if the customer's data is at stake. And no amount of security would do if the customer does not have a say in it. We understand that you can build stronger relations when the foundations are strong enough to hold them. With Zoho Desk's privacy control features, your customers can be rest assured that their data remains in their control.

Data subject requests: Data subject requests, as covered by GDPR, give users the right to exercise control over their data. With the privacy controls in Zoho Desk, you can easily manage these requests while maintaining data integrity.

Read receipts: Customer's also have complete control over providing read receipts. Receiving read receipts can help your agents understand if your customers have read their emails. This insight helps you know if you are required to follow up on customers and take other actions accordingly.

Data backup: Stay more in control of your help desk data. With Zoho Desk you can backup data periodically and schedule [data backups](#) as per your choice.

Conclusion

Change is inevitable. Your customers' behavior is changing. Your operations are changing to meet their needs. And we are changing to accommodate your growing needs. Zoho Desk equips you with the tools you need to adapt to changes and beat the competition. We are here to help you get closer to your customers by expanding your omnichannel offerings, strengthening self-service capabilities, and building better experiences. Stay connected with Desk for more changes that will help your business grow!

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