

Streamline customer support processes with Blueprints

Introduction

Enrolling in a university, checking in to a hotel room, or even ordering food—ever wondered how you're able to do these things seamlessly from start to end?

There is a process that ensures these events repeatedly happen in the exact same way every time.

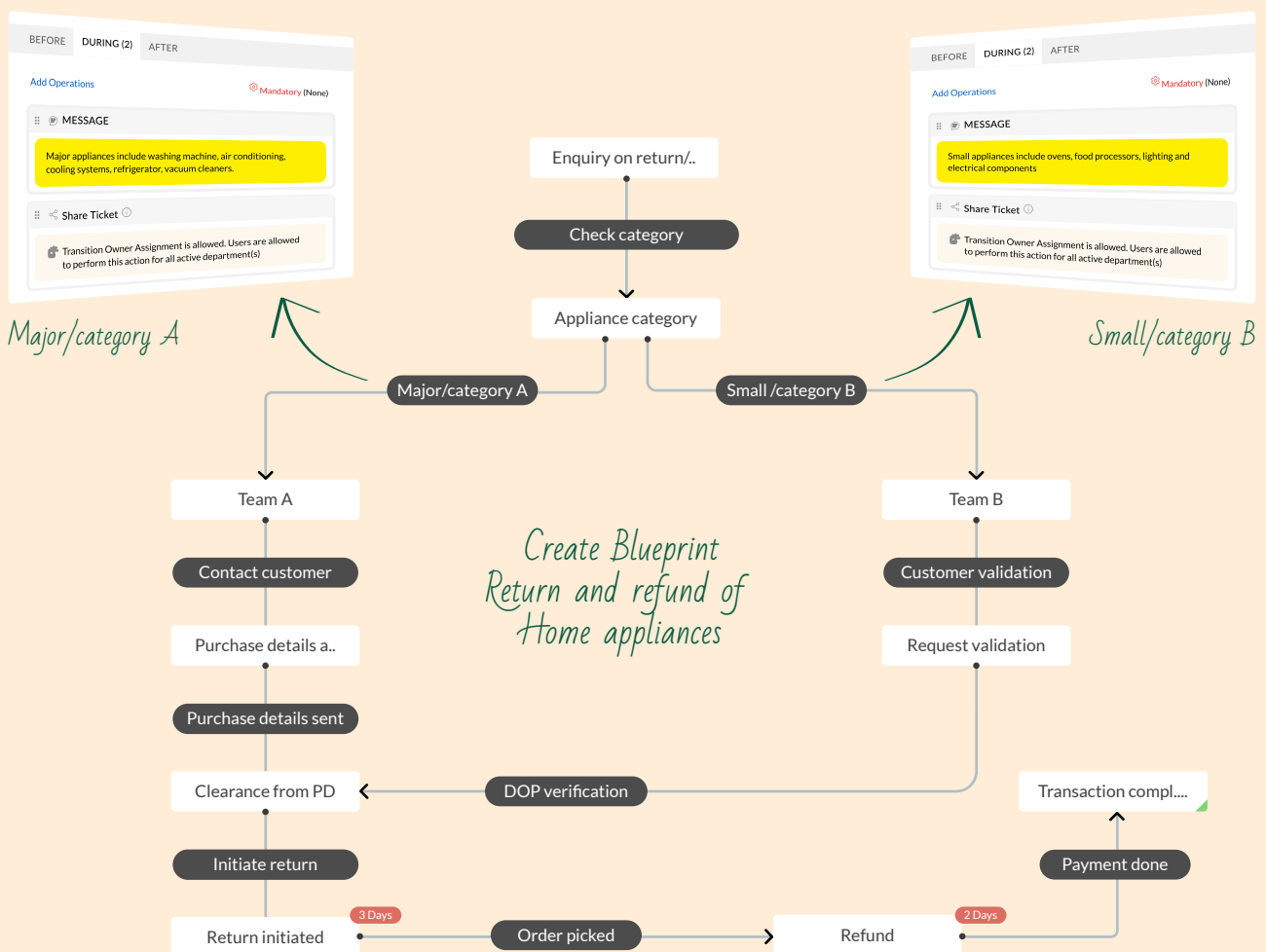
Even businesses run on multiple processes. Whether it's manufacturing, recruitment, sales or customer service, each division has a process that ensures consistency and maintains a standard.

Blueprint provides businesses with a way to implement standardized processes to ensure employees adhere to guidelines and work according to company standards.

This content will explore the different ways Blueprint can help streamline your customer support process.

Categorize products to streamline the return and refund process

Let's consider the example of Stella. Stella is a customer support executive who keeps records of customer issues and requests for a home electronics retailer. Her job is to segregate the requests for different appliances and send them to the right department.



Though she knows the process, Stella often gets confused when categorizing major and small appliances and ends up sending issues to the wrong department. In some cases, inadvertent delays in resolving customer issues have resulted in escalations to the support manager, Alex.

Alex is the Administrator of the company's Zoho Desk account. He decides to create a Blueprint to help Stella identify the appropriate categories for each request, and notify agents when a new support ticket is assigned to them. This way, tickets can be addressed promptly by the right teams.

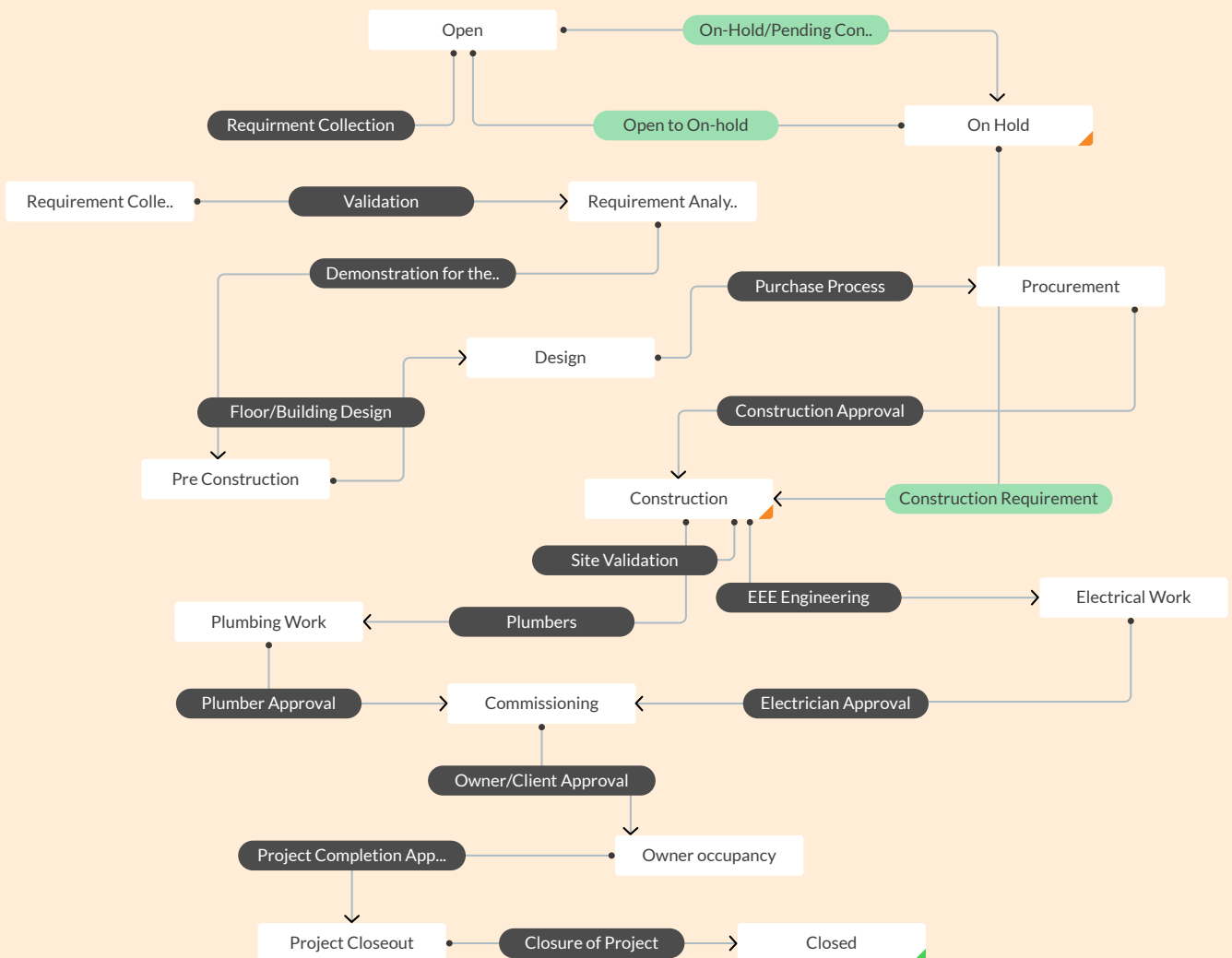
The below table shows how Blueprint benefits this hypothetical retailer:

Who?	How?	What?
Agents	<ul style="list-style-type: none"> ▶ Notifies them when a ticket or task is assigned to them or their team. ▶ Guides them through the steps to close out tickets, and also provides additional information when available. ▶ Shares tickets with other team members for easy collaboration. 	<ul style="list-style-type: none"> ▶ Email alerts to agents and teams. ▶ Messages included during transition. ▶ Share tickets.
Support manager	<ul style="list-style-type: none"> ▶ Displays progress of tickets. 	<ul style="list-style-type: none"> ▶ Blueprint dashboard
Customers	<ul style="list-style-type: none"> ▶ Tickets move quickly between stages without long waiting periods. This leads to faster ticket resolutions. 	<ul style="list-style-type: none"> ▶ Service-level agreement at every state to set deadline.

Automatically map projects to their current stage for accurate reporting and accounting

Imagine a real estate firm that manages end-to-end construction projects for government agencies and contractors. Different teams manage design analysis, pre-construction tasks, and handover.

As general manager, Steve has to prepare reports on the company's financial and operational conditions for every fiscal year and present them to stakeholders. Based on the report and the current stage of a project, budgets are allocated and other important decisions are made.



The company uses its own database to record each project's details. Then, the agents manually update a project's status as it transitions to different stages. Steve finds it difficult to get information about a project from the database, since the details are rarely updated on time. And getting details from individual project managers can be an uphill battle.

Emily, the project coordinator, contemplates creating Blueprints for each construction project in Zoho Desk to help Steve easily access accurate information about projects. She recognizes that Blueprints can also help the business scale through automation by reducing inadvertent errors, saving time, and supporting data accuracy.

The below table shows how Blueprint benefits this hypothetical retailer:

Who?	How?	What?
<p>Project manager, coordinators, general manager</p>	<ul style="list-style-type: none"> ▶ Shows the status of each project in real time. ▶ Identifies the reason a project is on hold or shelved. 	<ul style="list-style-type: none"> ▶ View current state of the project in the Ticket Detail view. ▶ Access the Blueprint Dashboard
<p>Agents</p>	<ul style="list-style-type: none"> ▶ Moves projects from any state to "on hold" or "pending." ▶ Lets agents change the state of a project with a click. ▶ Lets agents update fields, add tags, and reply to tickets (customer inquiries). 	<ul style="list-style-type: none"> ▶ Make "on hold" and "pending" common transitions. ▶ Use transitions between states to move the project from one state to another. ▶ Use operations and set actions.
<p>Vendors, contractors</p>	<ul style="list-style-type: none"> ▶ Notifies when the project is ready for plumbing, electrical, or raw material procurement. 	<ul style="list-style-type: none"> ▶ Send email notifications through webhooks.

Provide additional information before moving tickets to another department for faster resolution

An IT company categorizes customer requests and issues into different tiers based on the severity, support assistance needed, and technical expertise required. The company uses Zoho Desk as its ticketing system.

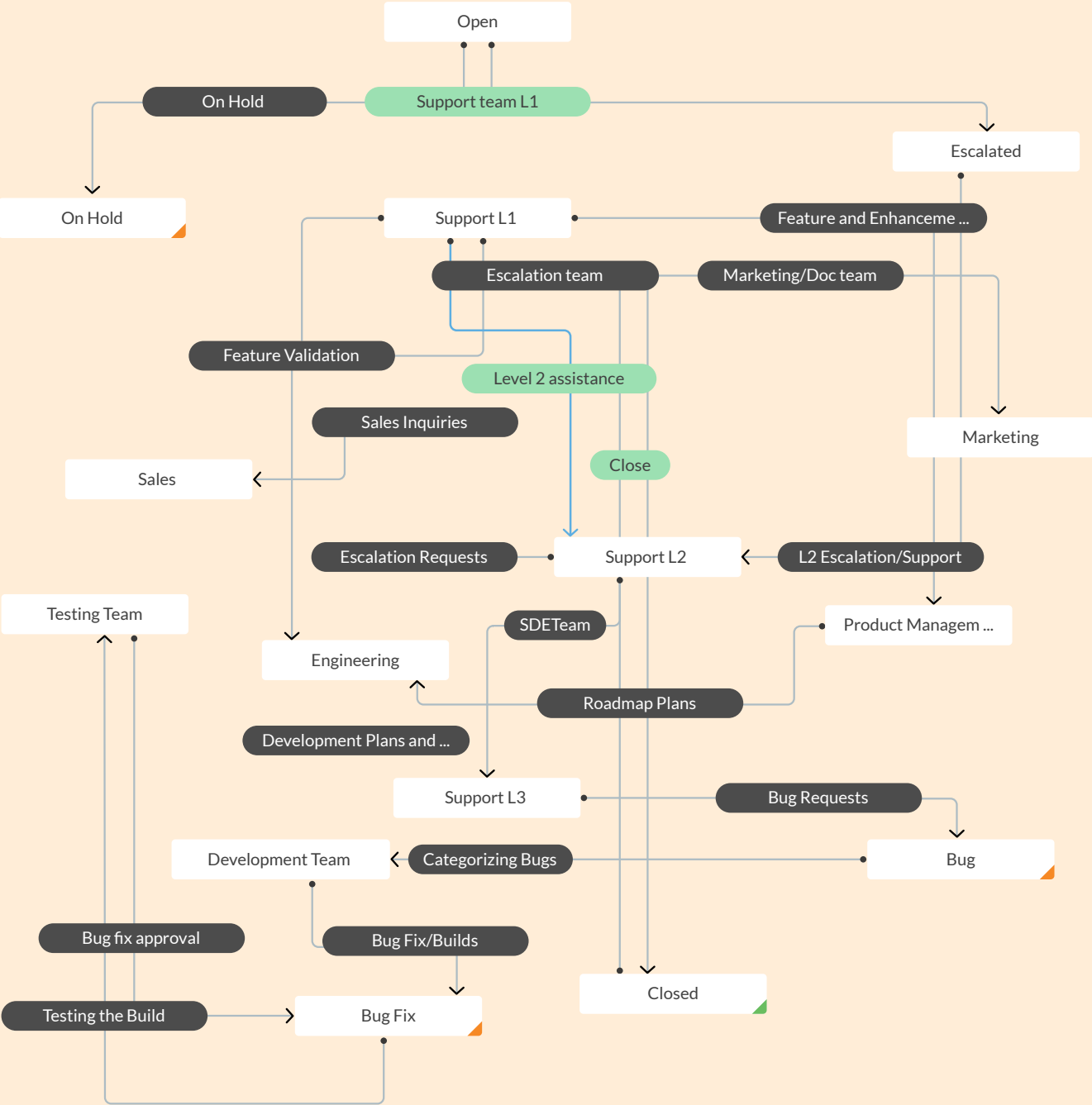
Phil, the Support Administrator of the Desk account, has configured ticket sharing so that agents can move tickets to other departments if:

- ✓ The issue doesn't meet their criteria or require their expertise.
- ✓ The customer raises other concerns in the existing ticket, which should be handled by other teams.
- ✓ The customer needs help with configuration.

When a ticket is transferred, important details shared by the customer over calls or "off the record" are not shared with receiving agents, which often causes delays and unnecessary back-and-forth communication with customers. Some unhappy customers have raised concerns about poor customer service and escalated tickets due to delayed resolutions.



Phil uses Blueprint to automate the transition of tickets between departments, notify agents and teams when new tickets are assigned to them, and mandate information sharing.



The table below shows how Blueprint helped Phil expedite ticket closures and improve customer service experiences:

Who?	How?	What?
<p>Agents, teams</p>	<ul style="list-style-type: none"> ▶ Allows actions, like comments and field updates, only during a Blueprint transition. ▶ Notifies when a ticket is transferred from another department. ▶ Enables ticket sharing with other agents and teams. ▶ Mandates messages. 	<ul style="list-style-type: none"> ▶ Strict Mode. ▶ Email alerts to agents and teams. ▶ Ability to share tickets during transition. ▶ Ability to share messages during transition.
<p>Customers</p>	<ul style="list-style-type: none"> ▶ Leads to quick resolution. ▶ Improves support experience. 	<ul style="list-style-type: none"> ▶ Query, issue, and other details shared within ticket.

Summary

Blueprint helps organizations automate and streamline operations to achieve consistency and enforce a uniform approach to work. As a company expands and changes, it may require the improvement and validation of already established procedures. Maintaining organization-wide standards can have long-term positive impacts on both revenue and customer satisfaction.

Further learning

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