

DECISION PAPER



Date: Aug. 12, 2019

Issue: Seeking organized and systematic approach to ensure member emails to the board are being routed to the appropriate people to answer, done in a timely manner and in a satisfactory way.

Background:

Zendesk, currently used to field, organize and respond incoming member questions in Member Services, tracks the response time of emails and customer satisfaction of the process. Zendesk has proven to be an impactful tool in improving customer service and follow-up since introduced in 2018.

Adding the Board of Directors to Zendesk would cost \$89.00 per month (or \$1,068 per year), creating an “agent” to field and manage the incoming emails, approximately 100 per month.

PLEASE SEE ATTACHED FLOW DOCUMENT TO DETAIL SUGGESTED PROCESS

Highlights of process include:

- Incoming email goes to board + Zendesk concurrently
- Automated receipt goes to sending
- Member Services triages to Don or appropriate senior manager
- Once addressed, senior manager provides report back to the board
- Once ticket is closed, member will be sent a customer satisfaction survey
- Metrics can be pulled at anytime on quantity, open tickets, satisfaction and more.

Benefits of Zendesk:

- Merge tickets of the same customers who contact multiple times through multiple departments/Board Members. Agents can pick up with the same customer and see what has been done.
- Better team work between the departments to increase the customer service Tahoe Donner provided.
- Agents can view the telephone number in the ticket in case the phone call is dropped. Voice mails are recorded and written out for the agent.
- Can run reports on agent’s productivity and team’s achievements.
- Can leverage powerful efficiency tools in software like macro responses and added to help center for self service.
- Macros can be added to the Agents responses so common questions can be answered quickly and efficiently.
- Track volume and performance throughout the year.
- Customer satisfaction emails are sent out and come back through Zendesk.

Options:

1. Adopt the flow process and \$89 per month fee.
2. Do nothing at this time.

Prepared By: ‘Chelle Sonder

Reviewed By: Lindsay Hogan

General Manager Approval: _____ **Date:** _____



ZenDesk Flow of Board Emails

Why Zendesk?

Zendesk provides metrics to ensure members receive a response and in a measured amount of time, in addition to an automated system to gain feedback from the interaction.

