ZOHO

Level up your CX with seamless integration between

Zoho CRM *and* Zoho Desk

Introduction

With rapidly changing customer trends and highly competitive markets, providing a great customer experience is the one constant factor that can help you differentiate your business.

If you're an entrepreneur, no matter how well your business is doing, you'll always face new challenges (and need to revisit your CX solutions) as your organization grows. This is especially true if your operations are still being managed on spreadsheets, and you only connect with your customers through isolated channels like email and WhatsApp.

As you hire more staff to help with sales and support, your teams will face difficulties managing a growing volume of information. Soon, your spreadsheets become a mess, emails pile up, sales reps struggle to advance new deals, and support gets delayed due to a lack of information or delayed communications. Customers are dissatisfied, growth slows down, and repeat customers fall in numbers.

Zoho Desk

You purchase customer relationship management software (CRM), an effective tool that helps capture leads, manage deals, and build your customer base efficiently, all on one single platform. With a modern CRM, all your customer data and business policies are stored in one place to help your sales and marketing teams strategize effectively.

But there's a catch to this, as customers might abandon a brand if their experience is poor. Generating leads and converting them into customers is great—but it's not enough to keep your business growing. The initial acquisition of a customer doesn't necessarily result in their loyalty to the business if they don't have a positive post-sale experience.

A study by Gartner found that businesses seeking long-run success need to prioritize customer retention. This requires measures to ensure customers are well-supported and feel valued. Thus, to build a loyal customer base and support sales growth, your business needs to employ a CRM that integrates with dedicated customer service software.

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What is customer service software?

Customer service (help desk) software is a specialized tool that streamlines your customer support operations, enhances agent productivity, and maximizes customer happiness. It aids your support teams in organizing, managing, and responding to customer requests through an omni-channel platform.

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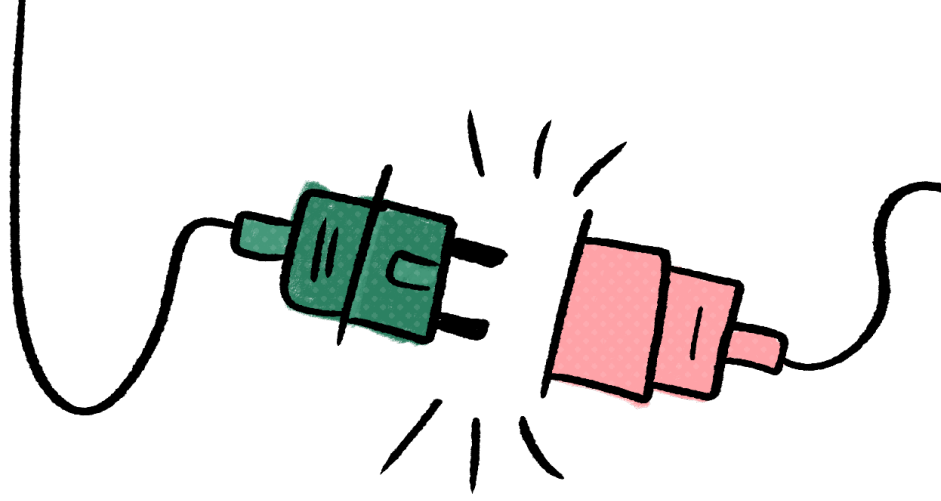
Challenges of disconnected CRM and help desk systems

Disconnected teamwork

Sales and support teams play a crucial role because they interact with customers on a daily basis. These two teams work on different tools to automate sale processes and offer support. Most times, information needs to be shared amongst them. Efficiency is drastically affected as teams get caught up in switching between applications. Ultimately, your business communications end up in silos, leading to disconnect and chaos.

Delayed resolutions

Time is of the essence in dealing with customers. Without a unified console, resolving issues takes longer than expected. Teams are expected to enter data manually, causing increased workload and data duplication. This also leads to customer dissatisfaction and fragmented customer experiences.

Low customer retention

Customers are key stakeholders for any business. A Redpoint Global survey states that about 74% of consumers believe brand loyalty is about feeling understood and valued, not perks and discounts. Good customer service encourages customers to stay loyal to the brand, thus promoting lasting customer relationships. Both sales and support teams feel empowered in such positive environment and bring about successful business days.Delayed resolutions

Hinders growth and scalability

A disconnected workplace can cause reduced team productivity. As there is no complete picture of customer data, opportunities for improvement are usually missed. It also becomes harder to up-sell and cross-sell.

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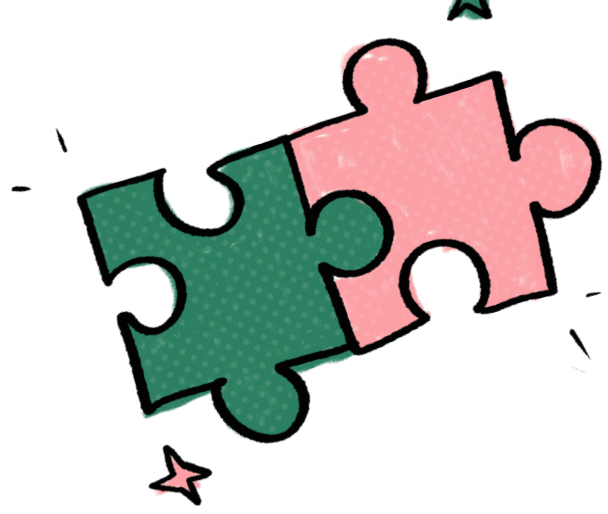
Benefits of CRM—help desk integration

While the sales teams tap into the market's heartbeat and win deals, the quality of customer support offered can change these wins into victory. Therefore, the right blend of customer relationship management (CRM) software and help desk empowers your customer facing teams.

Unified customer view

When you integrate these systems, all interactions with your sales teams (emails, phone calls, surveys, social media messages) and support teams (tickets, requests, self-service platforms) are organized and managed in a single location. This two-way data sync eliminates manual data entry, inconsistency, and duplication to promote streamlined interactions across touchpoints in the sales and support processes.

Customer retention and loyalty

By integrating your sales and support systems, operations are proactive, personalized, and timely. Therefore, a good customer experience throughout the customer journey plays a big role in forging long-lasting customer relationships, as stated by a Microsoft survey.

Zoho Desk

Improved team collaborations

With CRM and help desk integrations, your teams can collaborate better without having to struggle and deal with constant app-switching. Teams can easily add internal notes, keeping everyone on-board and updated. This integration also gives a chance to capitalize on the up-sell and cross-sell opportunities that might arise during any support interactions. Sales teams can quickly be informed within the system without any delay. Easy and smooth escalations with the CRM system ensure prompt assistance. Customer retention and loyalty

Faster customer resolutions

Interactions are expected to be quick and effective. Whether it's sales or support, with a unified portal, managing operations is easy because information is readily available. Sales teams get deeper insights into past support interactions and customer pain points. This allows teams to strategize and develop custom sales pitches proactively. While support teams can quickly diagnose customer requests or complaints and offer proactive, personalized assistance. This leads to happier and satisfied customers.

Data-driven solutions

Sales and support working in parallel is a game changer. An integrated system offers your teams the ability to analyze support interactions, understand customer trends, and identify areas for improvement. They can use this data to strategize better for an improved customer approach.

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What customer service software solutions can Zoho CRM integrate with?
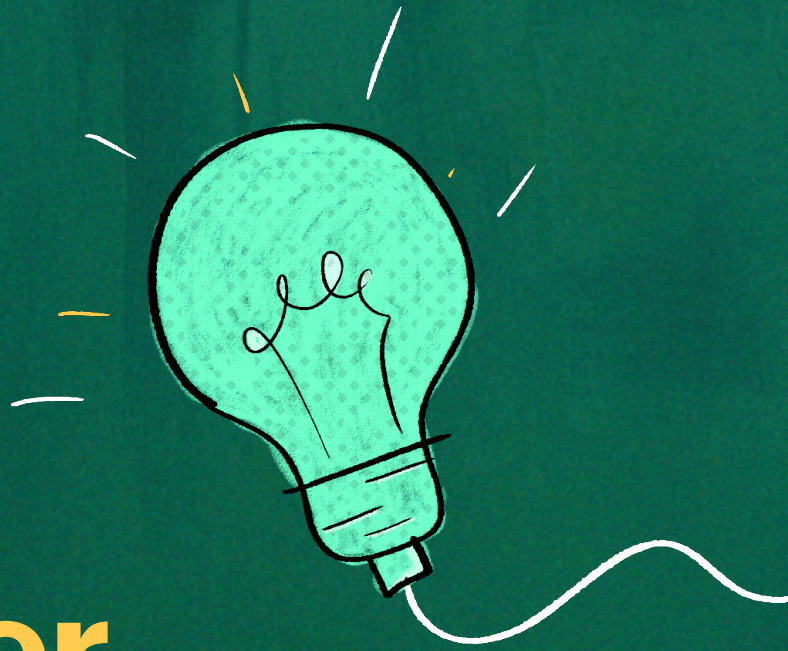
By integrating your Zoho CRM system with customer support software, you empower your teams as well as your customers. Zoho CRM can integrate with two popular customer service software solutions available in the market.

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Zendesk Support

Zendesk offers businesses a multi-channel support platform with separate applications for live chat, telephony, analytics and help centers. It offers a robust and extensive feature set, but can be complex to set up and use. Zendesk Support pricing plans start at $19 and increase to $115 for their highest edition. No free support plan is available for users.

With the Zoho CRM and Zendesk integration, you can associate support tickets in your Zendesk account with your CRM contacts. You can either install the Zendesk extension through Zoho Marketplace or by logging into your Zoho CRM account. Businesses with Zoho CRM administrator privileges can only download the extension, and users are required to own a free trial plan or a paid plan with Zendesk. On installing this extension, two custom modules will be created: Zendesk Tickets and Zendesk Ticket Comments. Learn more about this integration.

Zoho Desk

Zoho Desk, offers businesses with an omnichannel platform, such as email, telephony, social media messaging apps and live chat. It's easier to set up and customize. With a variety of pricing plans to choose from, starting at $14 and including a top-tier edition at $40, Zoho Desk is a cost-effective, value-adding investment for any business looking to improve their customer support experience.

Key features of Zoho Desk

Omni-channel support

Switching between tabs can be cumbersome; customers can reach out on multiple channels such as email, phone calls, live chat, SMS, and social media messaging platforms. A help desk solution, for example, Zoho Desk, ensures no interactions get slipped through cracks.
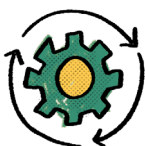
Automation

Customers expect fast resolutions. Zoho Desk's automation capabilities, such as ticket assignment rules, workflows, blueprints, service level agreements, and notifications, help streamline ticket management. These tools empower agents and improve their productivity. Customers are satisfied because their tickets are resolved in a timely and organized manner.

AI-powered solutions

Complex support creates confusion, leading to customers abandoning their resolution journeys midway. Zia, Zoho Desk's AI assistant, helps customers and agents resolve their issues. Agents can benefit from a reply assistant, sentiment analysis, and notifications to offer personalized support to customers.
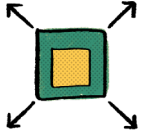
Scalability

Every business aims to grow, and Zoho Desk supports your growth plans. It is easy to start using and easier to scale, with affordable plans for businesses of all sizes. With features like custom modules, rebranding, and a sandbox environment for customization settings, businesses can help their support teams adapt to a growing customer base.

Analytics

Data-driven insights play a crucial role in understanding customer trends. A good analysis of customer feedback can help support teams improve their quality of support through enhanced knowledge base articles and deliver proactive assistance through rule-based chatbots. Managers can also benefit from analyzing their support team operations.

Integrations

Businesses use many different tools in their daily operations. Zoho Desk offers seamless integrations to enhance productivity for almost 300+ native and third-party apps through Zoho Marketplace.

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Advantages of Zoho CRM and Zoho Desk integration

Two-way data synchronization

Manage tickets within Zoho CRM modules:

With this integration, relevant support tickets from Zoho Desk are pulled up and displayed under each lead and contact in Zoho CRM. Sales representatives can send replies, add comments, and see all of the relevant information within CRM.This helps them strategize and manage leads and customers more efficiently.

Access detailed customer information:

Support agents can access complete customer information (deal valuation, product evaluated, notes, and activities) pulled from the CRM in Zoho Desk. This helps them offer contextual and proactive support to customers.

Improved productivity

Sales signals in CRM:

Customer updates help provide timely assistance. By integrating your help desk, sales teams get alerted whenever a lead or a customer submits, responds to, or leaves a rating for a ticket. They can quickly take any necessary actions to ensure customers are satisfied.
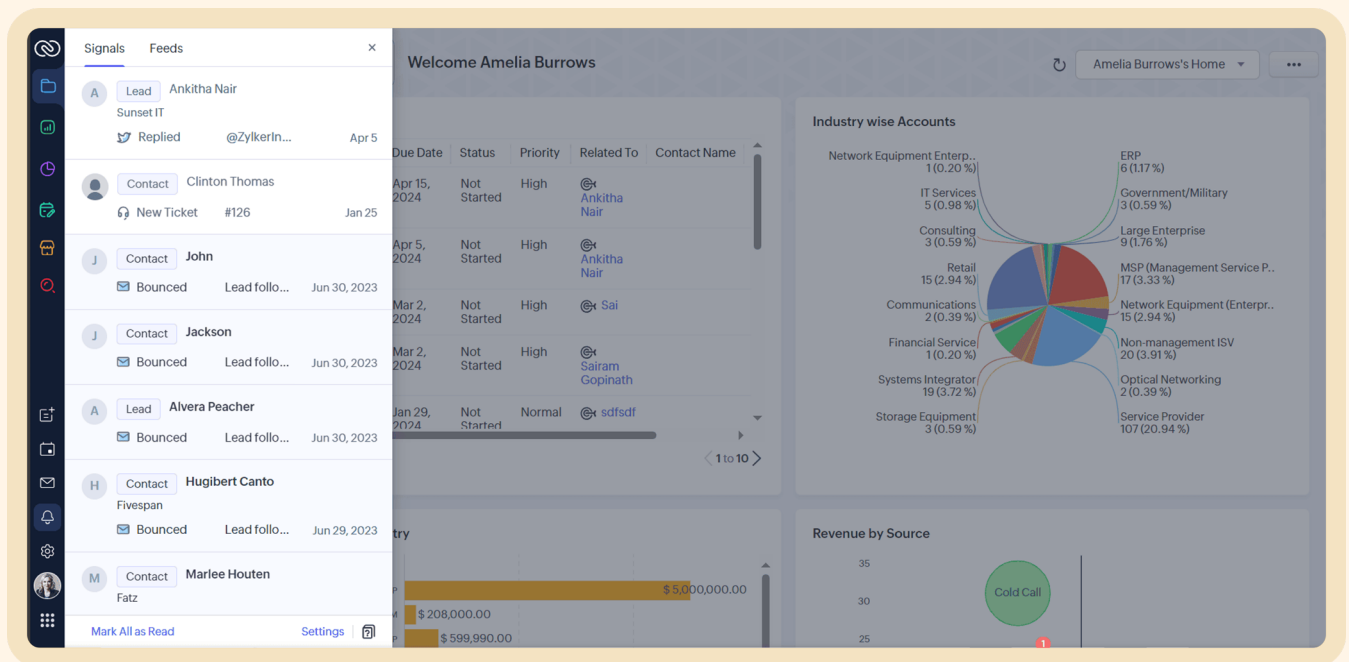
Handshake mode in Zoho Desk:

Support agents can organize their tickets based on CRM status (lead, potential, new, or customer). Inside a ticket, they can view details like deal valuation and product evaluated.
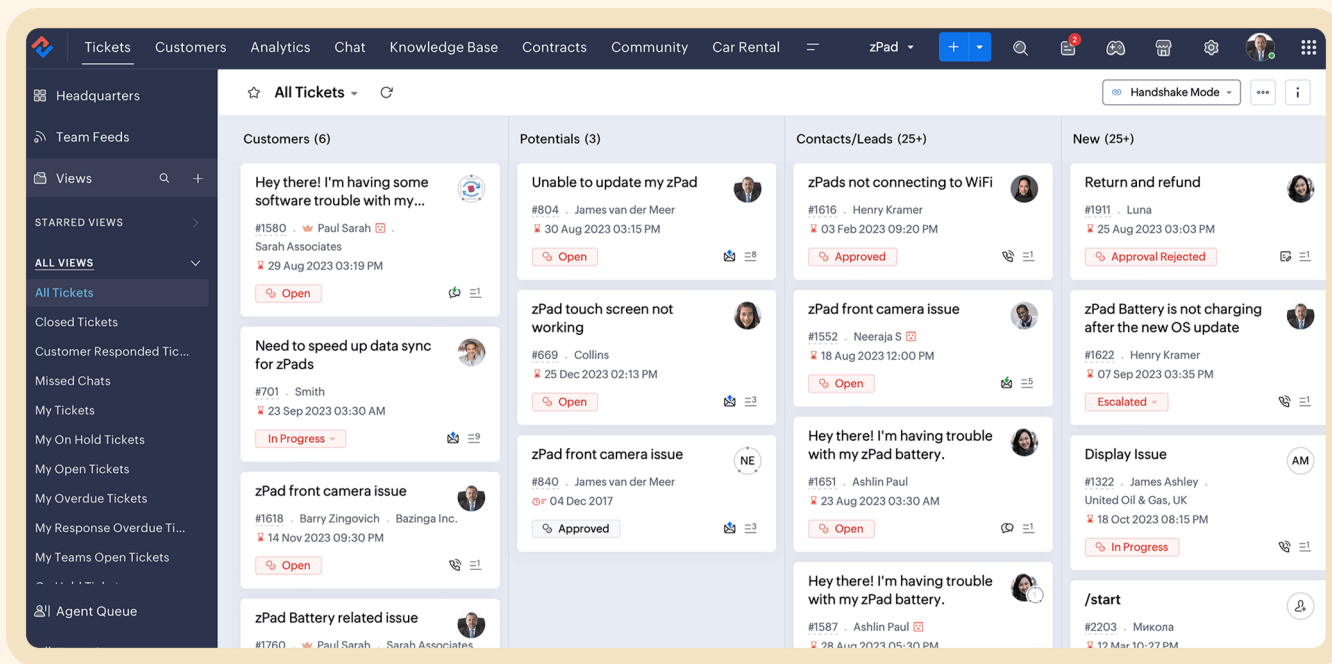
Team collaborations

Sales and support teams can collaborate seamlessly to offer leads and customers exceptional customer experiences. Without switching applications, teams can chat with colleagues across departments within a customer ticket. Collaboration helps bring about up-sell and cross-sell opportunities to not slip through cracks. Thus, improving customer retention and higher repeat sales.
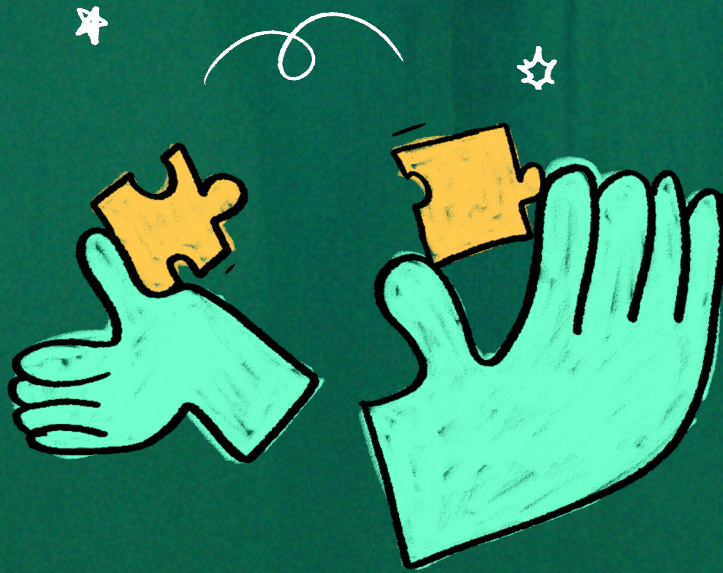
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How to integrate Zoho Desk with Zoho CRM

By integrating sales and support operations, businesses can offer a holistic customer experience. All paid editions of Zoho CRM support this integration. To integrate your CRM with Zoho Desk, you will require administrator privileges for Desk.

Learn more about the steps to follow to enable this integration.

Zoho Desk

The Zoho Desk advantage

50%
faster response time.

15%
increase in first contact resolution.

14%
increase in CSAT score.

48%
reduction in customer churn rate.

50%
faster implementation.
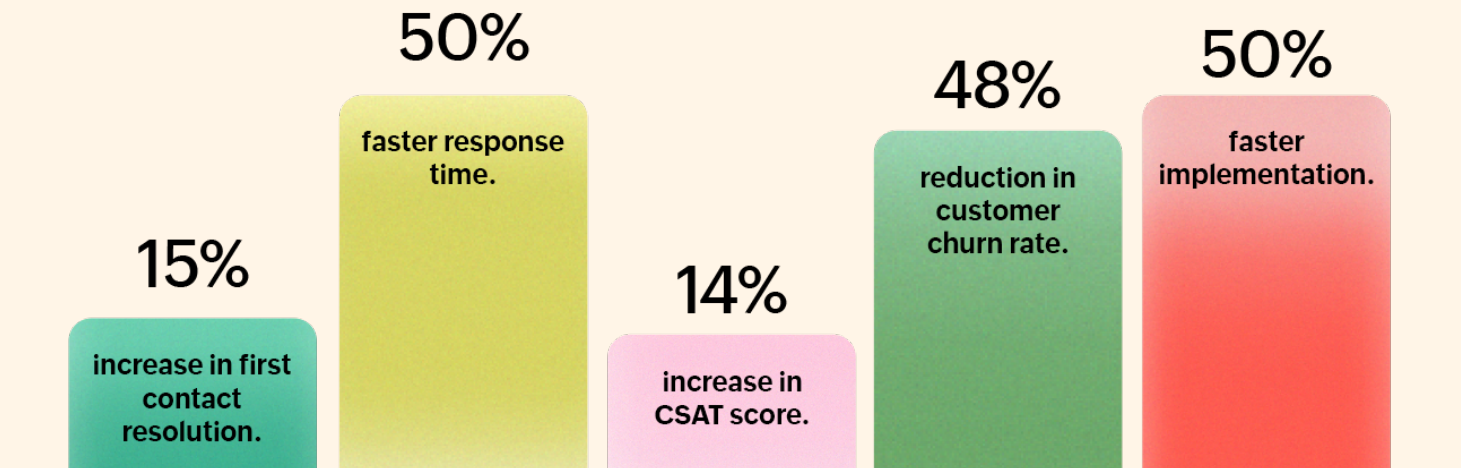
Seal your deals with support that makes a difference

Over 100,000 businesses around the world trust Zoho Desk to elevate their customer service

DAIMLER

zomato

Godrej

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ESSILOR

Mahindra Rise.

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