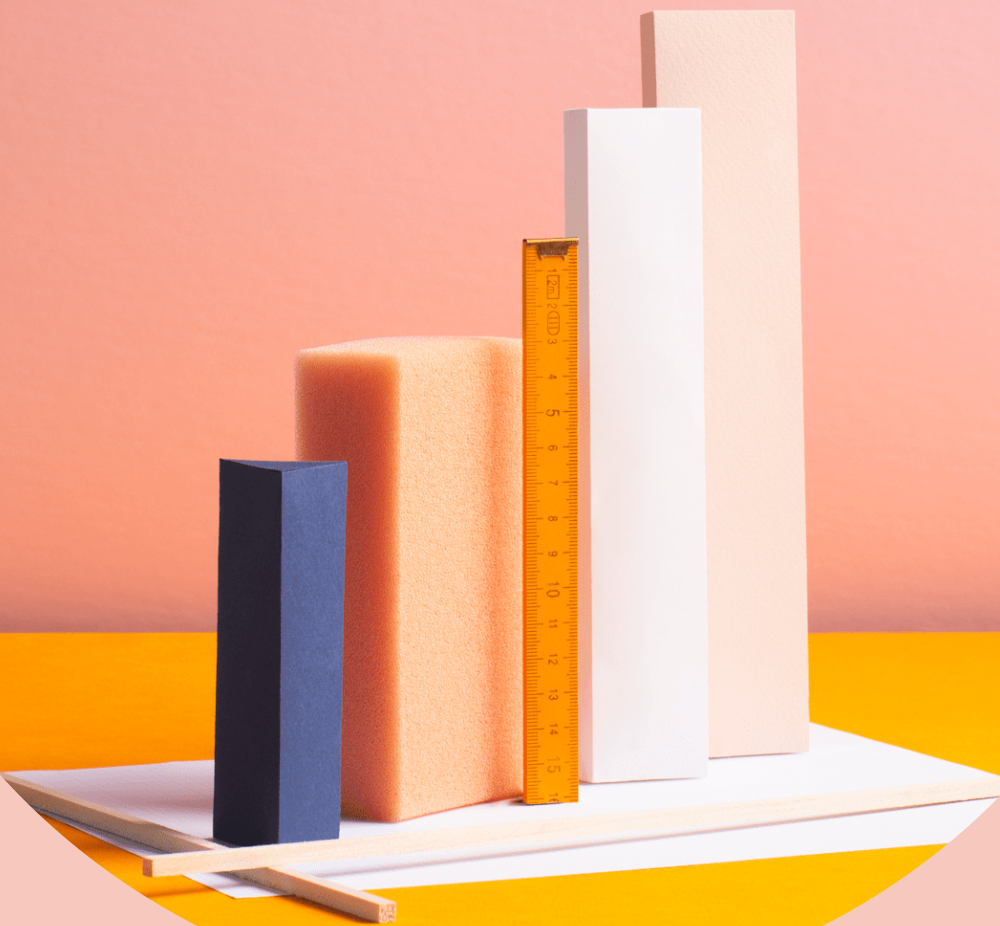


Optimize self-service with the right metrics



81% of people try to resolve an issue on their own before contacting customer service—that means self-service should be table stakes for CX leaders.



Once your business has deployed self-service in your support solution, it's important to keep track of key data points in order to offer optimal customer service. As your support operation scales, your help center will likely grow, and as you develop more content to share with your customers, the metrics that define its success will evolve, too.

Being data-driven means embracing agility: with out-of-the-box dashboards in Zendesk, your self-service data is visible so you can track, iterate, and optimize customer support. That keeps the customer at the center of your efforts.

It can be difficult to know where to start, but here are some tips to get your self-service metrics motor running:



TIP 1

Track self-service data to improve your help center strategy



TIP 2

Let bots do the heavy lifting to surface relevant content



TIP 3

Keep a close eye on search results – especially those that don't return answers



TIP 4

Customize your dashboards



TIP 5

Track agent engagement and make it easier for everyone to contribute

TIP 01

Track self-service data to improve your help center strategy



Zendesk provides a standard dashboard that makes it easy to track the self-service [metrics that matter most](#). For example, you can track how often agents are [recommending helpful articles](#) in real time. Each time an agent links to a help center article, that event is tracked and captured. Data points like this are important when developing your help center strategy.

For example, consider the data point for most frequently linked articles within tickets. While their frequent appearances suggest the articles are valuable resources, they also reveal a problem: the fact that they come up so often may indicate bigger issues in the customer journey. Knowing this, your sales and success teams could proactively connect with customers before the issue occurs, while product development could fix bugs and solve issues in new features.

At [Spartan Race](#), the team discovered that agents were linking to one particular article three times more than any other, according to Aja Varney, global customer engagement director. By tracking article data, they found it needed to rethink its communications strategy. The diagnosis? Key information wasn't being properly delivered to customers, which called for new processes with the customer success team to get ahead of the communication breakdown.

“This helped us to see what our agents were talking about the most and where we might need better customer-facing communications,” Varney said.

Article Translation Title	Linked	▼	Flagged
What to do if your order doesn't arrive on time	2 703		0
How to contact your delivery driver	1 219		1
Payment options	829		3
Where we deliver	728		2

Let bots do the heavy lifting to surface relevant content



One-touch tickets—tickets that were solved in a single interaction—can tell you a lot about your self-service. With the out-of-the-box analytics dashboard, one-touch tickets are readily visible and easily trackable. A high volume of one-touch tickets could mean that too many customers are contacting support when help center content could have provided answers faster. This is low-hanging fruit for AI chatbots like Answer Bot.

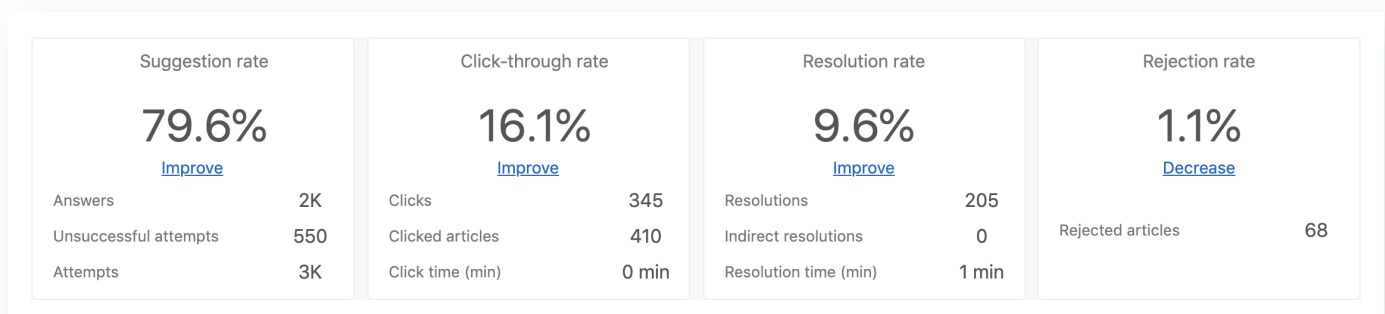
The team at [Freshly](#) analyzed thousands of one-touch tickets to identify the most common queries customers had. After creating content that matched those needs, the team was then able to start optimizing with AI. By [finding patterns in how customers ask questions](#) and [surfacing relevant content](#) from the knowledge base, both agents and customers save time. Freshly says this approach—analyzing data, then optimizing and streamlining with AI—paid off with a better, more customer-centric experience.

The team at Expedia relies on AI in Zendesk to prompt admins and agents to spot trends in frequently asked

questions, helping them to augment their knowledge base. With the help of AI, it's easy to make data-informed decisions that bolster self service, which ultimately means agents can focus on more sophisticated queries.

“We now have a better sense of how many users are writing about specific topics. Subjects that are most important to our customers are more confidently addressed first now,” said Anne Cnockaert, who works in customer care at Expedia.

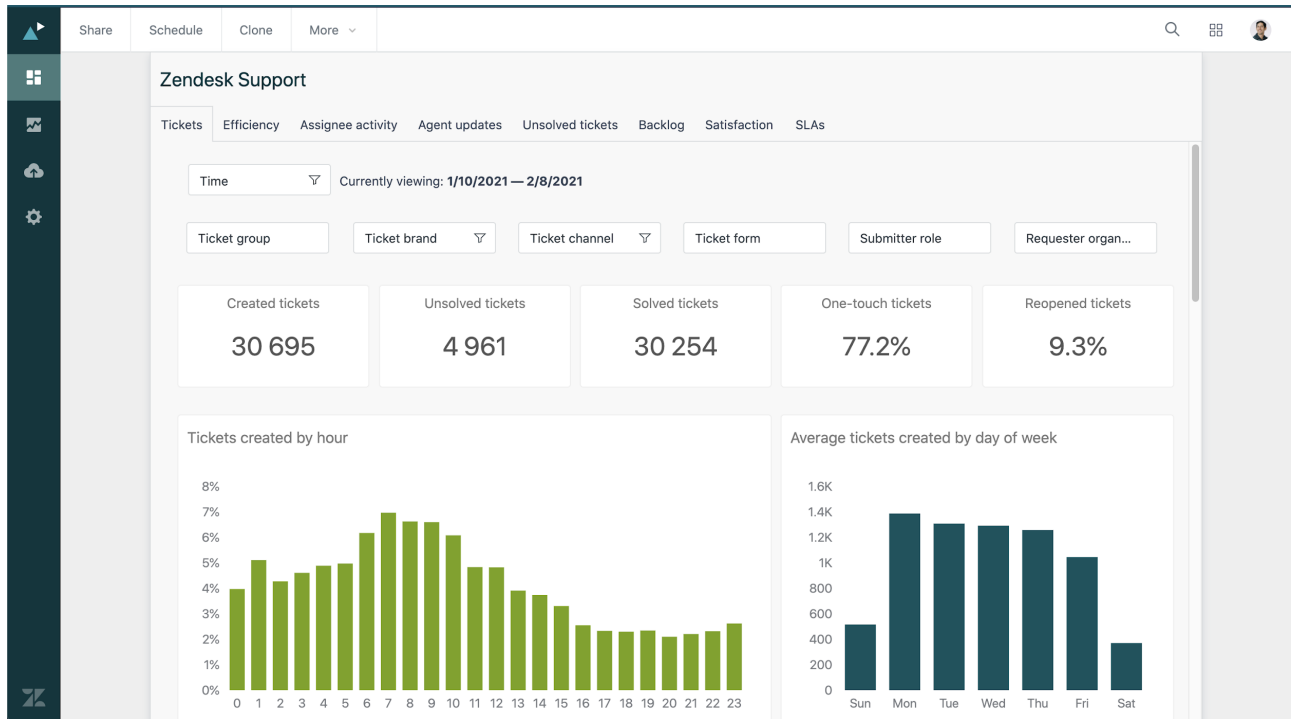
Zendesk makes it easy to [analyze Answer Bot's activity](#). Admins can measure how often Answer Bot successfully suggests a help center article and how often customers read the recommended content. One of the most crucial data points is the resolution rate: how often your customers are closing their own tickets without needing to involve an agent. You can also dig deeper if you want to see how individual articles are performing.



Answer Bot activity by article

	Article translation title	Article author	Suggested articles	Clicked articles	Resolution articles	Rejected articles	Resolutions/Clicks
1	[Redacted]	[Redacted]	79	78	10	19	13%
2	[Redacted]	[Redacted]	57	57	5	19	9%
3	[Redacted]	[Redacted]	53	53	4	13	8%
4	[Redacted]	[Redacted]	51	51	6	14	12%
5	[Redacted]	[Redacted]	51	51	4	16	8%
6	[Redacted]	[Redacted]	50	49	3	22	6%

Support Dashboard - Tickets: See how many one-touch tickets there are



Keep a close eye on search results—including those that don't return answers



Help centers maintained with an agile approach report the lowest percentage of searches with no response. This is another essential metric for monitoring success. There are real dollars and cents attached, too: more than half of customers will abandon their online purchases if they can't find fast and easy answers to their questions.

According to a 2021 study by the Harvard Business Review, customers tend to educate themselves about products, solutions, and services before engaging with sellers. Sellers, on the other hand, must continuously adjust their digital presence by analyzing and improving online content—boosting its visibility and staying relevant.

In the example below, searches with few results mean no relevant help content was provided after a customer (or an agent) typed a query into the search bar. A low click-through rate means the search resulted in a low number of clicks within the help center. This indicates the content provided wasn't useful enough for the customer to even consider it.

Content Cues is an AI-powered feature that can help with identifying gaps in your knowledge base by spotting trends in customer conversations. That can help your team identify common questions that would benefit from a new article. It's equally important to identify underperforming content. Low-click through, empty search results, and underperforming articles indicate that the content around that topic needs to be revised, either with more relevant titles or with entirely new articles that match search terms customers actually use.

With assistance from Content Cues, the Freshly team continuously tailors its language to more closely match that of customers. For example, the phrases “My delivery hasn't arrived” and “Where is my box?” are associated with the same help article. Content creation in Zendesk automatically optimizes content for search results. The impact is two-fold on the customer experience: content is robust and easy to find when people need it.

Search string	Total searches	Avg number of results	Click-through rate
shipping	9	7.0	25%
policy	4	3.0	0%
clean	2	1.0	0%
email	2	4.0	75%
time	1	2.0	200%
policies	1	3.0	0%
whatsapp	1	0.0	0%

Customize your dashboards



An out-of-the-box solution might work in some instances, but as your company grows, so will your support operation. Basic reports can help determine where and when to update knowledge base content, but advanced reporting can help your business create a content strategy with more specific and sophisticated targeting.

It's possible to build [custom dashboards](#) in Zendesk in order to understand unique or complex use cases. Beyond building out dashboards to report around views and links, admins can use apps and integrations in their help desk software to create custom dashboards for metrics not captured with a standard solution. It is also

possible to create custom dashboards with a little elbow grease: for example, [by combining different attributes](#) in Zendesk to build a table or word cloud, a team can track when Answer Bot is unable to make a recommendation.

According to the [2021 CX Trends](#) report, access to data remains a persistent challenge for many support teams: less than half of agents have access to relevant data that can help them better assist customers. Different industries, like ecommerce, fintech, online health, software, cybersecurity, gaming, and entertainment will each have unique needs and support strategies. Customer experience is not one-size-fits-all.

Ticket ID	Ticket created - Date	Ticket status	Answer status	Article	Answer enquiry	Attempts
128	2020-05-18	New	Offered	How to charge a Dongle	How to charge a dongle How do I charge a dongle?	1
				Bluetooth Dongles	How to charge a dongle How do I charge a dongle?	1
127	2020-05-14	New	Offered	How do I fix my whatchamacallit?	Whatchamacallit? Whatchamacallit? Sent with [Pro	1
126	2020-05-14	New	Offered	How do I fix my whatchamacallit?	How do I fix my whatchamacallit? How do I fix my v	1
				Microsoft Office en-us hc	How do I fix my whatchamacallit? How do I fix my v	1
125	2020-05-14	New	Offered	How do I fix my whatchamacallit?	How do I fix my whatchamacallit? How do I fix my v	1
				Microsoft Office en-us hc	How do I fix my whatchamacallit? How do I fix my v	1
124	2020-05-14	New	Offered	Microsoft Office en-us hc	Microsoft Office en-us hc Microsoft Office en-us h	1
123	2020-05-14	New	Unoffered		Incredibly obscure question Incredibly obscure que	1
122	2020-05-14	New	Offered	How to charge a Dongle	How do I charge my dongle? How do I charge my d	1
				Microsoft Office en-us hc	How do I charge my dongle? How do I charge my d	1
				Bluetooth Dongles	How do I charge my dongle? How do I charge my d	1
121	2020-05-14	New	Unoffered		Incredibly obscure question Incredibly obscure que	1
120	2020-05-14	New	Offered	How to charge a Dongle	How do I charge my dongle? How do I charge my d	1
				Microsoft Office en-us hc	How do I charge my dongle? How do I charge my d	1
				Bluetooth Dongles	How do I charge my dongle? How do I charge my d	1

Track agent engagement and make it easier for everyone to contribute



Empowered agents means having a healthier help center. Your agents have a voice—and heaps of knowledge. For example, tracking data and soliciting agent feedback on existing or potential articles in the help center can lead to better, more effective content.

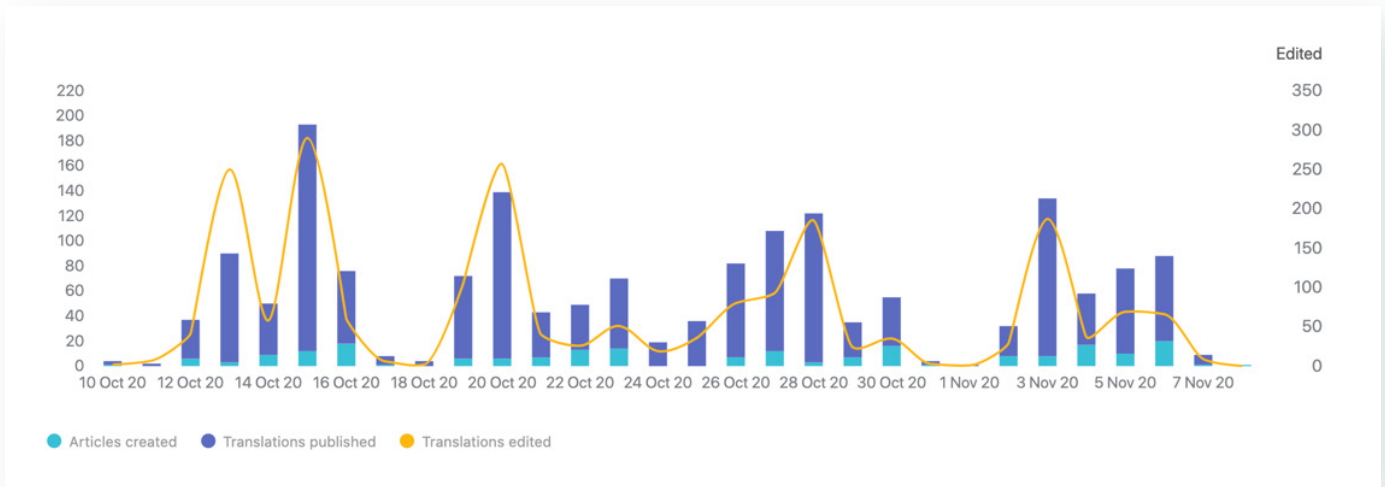
With the dashboards in Zendesk, you can measure how agents are engaging with the knowledge base over time. Those with a flair for writing or particularly deep expertise about a product or feature, for example, may do well with writing, editing, or publishing articles. AI can fill in the gaps, but nothing beats the human touch.

Next, learn more about which agents are contributing content, how much of it, and on which topics. Then use that data to incentivize agents to contribute in a way that speaks to their skills and interests.

It's a worthwhile use of agent resources, as 83 percent of customers say the Team Publishing feature made it easier to involve their team in content creation, enabling them to gather insights and knowledge from more people in their organization. Jessica Haas, director of customer experience at Formstack, estimates a time savings of five to ten hours per week and reports increased employee satisfaction now that agents are allowed to publish their own work.



Creation and updates



Agent activity

Agent name	Translations edited	Articles created	Translations published	Translations assigned	Translations submitted for review	Translations approved for publishing
1 Kal	40	26	40	0	1	1
2 Bel	25	20	25	0	0	0
3 Ry	1	18	29	0	0	0
4 Eli	28	15	38	0	0	0
5 Jal	2	15	2	0	0	0
6 Ro	180	13	187	1	0	0
7 An	24	11	29	0	0	0
8 Lis	130	8	141	1	0	0
9 Da	41	6	40	1	0	0
10 La	0	6	6	0	0	0
11 Bo	1	6	2	0	0	0
12 Ni	4	5	12	0	0	0
13 Mi	0	5	5	0	0	0
14 Ri	110	4	122	1	0	10

The tools for measuring self-service success should innovate alongside your knowledge-management solution—all of which move, hand in hand, at the pace of your business.

Self-service fails when it doesn't meet your customers' needs. It also creates blockers for your support agents by taking their attention away from pressing issues and directing them to frequently asked questions. Thinking creatively doesn't mean adding complexity to your customer relationships—it means making your customer service solution work for you.

Ready to explore the wide, wonderful world of metrics? [Learn more.](#)

SOURCES

1. The Harvard Business Review: <https://hbr.org/2017/01/kick-ass-customer-service>
2. The Harvard Business Review: hbr.org/2021/01/how-to-reach-new-customers-when-you-cant-meet-them-in-person
3. Zendesk Customer Experience Trends 2021: www.zendesk.com/customer-experience-trends/

