22.05 NA WEBR PTNR - Support Experience: A Force Multiplier for Your CRM

## **John Kelly**

We're going to give everybody just a few minutes to join as we get ready to kind of segue into today's topic, which I'm really excited about, support experience, a forced multiplier for your case management system.

So welcome to everybody, again, we've got a few people still joining. One of those classic days, I think, Brandon's here with me from 729 Solutions.

Most of us go back to back to back, busy days. Brandon, same thing for you?

## **Brandon Tidd**

Yep, full stack today.

## **John Kelly**

All right. Well, hey, while we're waiting, love to hear in the chat windows, right, if you have an opportunity and you want to kind of participate already with us publicly, let us know where you're coming from.

I think we've got people coming in from all over the United States, North America, internationally, so on and so forth. So don't be shy, go ahead and drop a few things.

We've got some folks coming in from Southern California, seeing the dialogue there, Reggie Brown from San Diego, my hometown. Brandon, where are you today?

## **Brandon Tidd**

I am in Cleveland.

## **John Kelly**

He's in Cleveland. I'm sitting in the lovely state of Texas. We've got some folks coming in from Tampa, Florida, welcome Michael. So always exciting to see kind of the geographic diversity now with the continued operating of remote experiences.

New York's here, so we're seeing representation from the Northeast portions of the United States, so on and so forth. We'll give it another minute or two, and then we'll kick into today's topic.

I do encourage everybody as we go through today's session to, in the entire time, use this chat window, type in questions, myself and Brandon and Omid and Alex, all the participants, the presenters today for the webinar, love the dialogue, love the interaction, so on and so forth.

I'll go ahead and begin and kind of kick this thing off, brief introductions, myself, I'm John Kelly. I'm the chief revenue officer for SupportLogic. I say this every time, don't hold that against me too much.

I grew up many years ago in the break fix world, so for many, many years, well over probably 15, I was a support person, ran this global support organization for a company called Oracle at scale, so that team was very, very large.

And you're talking billions of revenue and thousands of engineers, so on and so forth. And I'm just passionate about customers and support experiences, et cetera.

Also with us today, and you're going to be hearing from both of them is Alex James. Alex is the vice president of global customer support for Fivetran, both he and Omid have a lot to talk about with regards to support experiences and how you can really take your case management tools and systems and make them work even better for you today.

Talking to Alex for most of this session is Omid Razavi, Omid is our chief customer officer over at SupportLogic. So just going to be really exciting to hear from both of them as they go through all sorts of learnings and experiences that we've had over our collective 20, 30 years, you're going to hear from them briefly.

And then of course, we've got Brandon Tidd, solutions architect from 729, one of our key partners here. Love to hear right now, Brandon, why don't you talk to us a little bit about support experience, 729, Zendesk and all things that are happening in your neck of the woods.

Brandon.

## **Brandon Tidd**

Sounds good, thanks JK. And good morning, good evening, as the case may be depending on where or when you're watching this. I am Brandon Tidd with 729 Solutions. We are a Bay Area full stack dev shop that works as a premier Zendesk implementation partner.

I'm joining you today from Cleveland, as I mentioned, and I'm so excited to be talking to you today about your customer's journey. But before we get to that, we're going to start with a poll and to participate in the poll, if you're watching live, you can click on the poll's tab on the right hand side, right behind where you're chatting with us today.

And the first poll question is we want to know what is the biggest challenge that you have with creating a better customer experience within your ticketing system of choice?

So I'm going to open up this poll and we're going to have our choices presented to you, lack of visibility into valuable data to help predict and reduce churn, disparate siloed data infrastructure, unstructured data, or a train to improve the way you look at the customer support issues and deploying omnichannel approach to communicate with how customers prefer to communicate or agent training.

And if it's something else, let us know in the chat. So we've got some early outliers for unstructured data, agent training and deploying omnichannel approaches also in there.

And we'll give this just about another 10 seconds before we close and share the results.

And it looks like everyone's locked in their choices with unstructured data, a way to improve the way you look at the customer support issues coming in as number one.

Definitely all great issues that we're going to cover over the course of this conversation. So we all know that customer support is important, but just how important is it?

We're going to go back to the poll, I've got two more questions for you before we go any deeper and these are coming from the CX Trends report that Zendesk put out. And the first question is what percentage of customers would consider defecting from your brand and going to a competitor due to multiple bad CX experiences?

Is it 12%, 27%, 58% or 76%? What do you think? We'll give you just another few seconds to lock in those answers, this one's more split evenly.

Nobody's saying 12%, I think you're onto something there. This statistic surprised me, and by the way, if you'd like to get more information on the CX Trends report, the full report is available.

And let's see, a dead heat, 58 and 76% deadlocked at 28 .57%. The correct answer is 76%, so congratulations to those who correctly guessed 76%.

It's a high number, it's a really high number and a lot of organizations just don't put enough stock in how much that customer support experience matters to customers.

But you're here, so you obviously know that there's some benefit to it. As I was saying, if you'd like to see the full CX Trends report, you can click over to the documents section, we've got that linked as well, but one more poll for you because it's not all bad news.

This time, we want to know what percentage of customers say positive CX experience is likely to increase the amount and the times that they'll make additional purchases?

Is it 99%, is it 81%, is it 50% or is it 37%? Did you guys all just download the report right now? Either that, or you're you're catching on here?

It's not 99%, but everyone is correctly guessing that the answer is coming in here as 81%. So four out of five say that they will increase the amount of money that they're spending with you just for giving them good CX.

So the question becomes, how do we do that? And it's thanks to data like this, by the way, that we are starting to see many companies focus on their support center as more of a profit center for the very first time, and also thanks for participating in our poll today.

So many of that Zendesk is the gold standard when it comes to customer service software, whether you're a company like Disney or Uber or you are a startup that just has a couple of seats or a nonprofit organization, Zendesk can truly scale to fit the meet needs of any business.

And we at 729 Solutions work every day to help customers configure and extend the capabilities of Zendesk through tools like SupportLogic, as well as custom design and development tools that are unique to our client's needs, we truly help you connect all the dots.

And as the customer journey is starting to shift Zendesk too has pivoted towards being more of a conversational CRM, introducing messaging across multiple channels like WhatsApp, meeting customers where they are and intelligently deflecting conversations using artificial intelligence.

The happiest Zendesk customers are tracking their customer satisfaction with CSAT metrics and making adjustments accordingly. They're having meetings, they're reviewing bad feedback, they're making adjustments to their customer's journey and experience with their brand based on that feedback.

But there's a problem with that and that is that that challenge is that the responses are always reactive, the horse has already left the barn, so to speak, and given you a thumbs down on the way out the door.

So as good as it is to capture that information and respond to it, I'm going to turn things back to JK now, and he's going to tell us how we can help you shift from a defense to an offense.

JK.

## **John Kelly**

Well, thank you, Brandon, and everybody again, great opening remarks, so on and so forth. The most important part of today's conversation is what we're going to hear from Alex and Omid, right?

Super exciting to hear about the importance of the support experience. I'll make the statement, I think, every single person on this phone call will agree with, that the experience that our customers have is critical to revenue.

And so when I was sitting in the seat running my support organizations, I was always looking for the core foundation of tools and partnerships and things like that could make me successful. And then that one or two really cool thing that I could bring to the table that was a force multiplier, something that gave me the edge.

I would say that support now precedes sales, right? The support experience is the most critical thing about retaining the customers you have, retaining the revenue that you have.

If they're happy, if you do that well, then you can expand that relationship. So land and expand, and then move to retain and happiness with your customers going on forever and ever, right?

So I would say anything that allows you to shift from reactive to proactive support, anything that allows you to get additional visibility into what's happening is a force multiplier.

So one thing, supportlogic. io, supportlogic. com, look at the website, and you'll see a little bit about what we do, but we're a force multiplier that can help you with these things.

I would say that we're extracting the voice of customer, we're extracting signals that go beyond metadata, right? To make sure that how your customer's feeling, right?

What are they really experiencing? Are they frustrated? Are they happy? Right? Are they waiting on us? Do they want to provide us additional feedback, et cetera?

So the beauty of this platform, and I'll say this, right, partnerships with 729, customers like Fivetran, using tools and CRM products like Zendesk is deploying a tool that can make a difference, right?

So maximizing customer lifetime value, early warning systems, alerts and notifications, smart swarming, escalation prediction, wouldn't that be awesome to predict with accuracy of 60, 70, 80% of predictable escalations, if you knew about them before they happened.

Save those phone calls from the top level down saying, "What's going on with this account because they called me?" Account management done better, prioritize your backlog, all of these things really come into player here.

So SupportLogic, we do some great things in that front, we've got customers where they're seeing reduction in case review times by 60%, customer escalations by 30, 40, 50, 60, 70%, churn rates go down, so on and so forth.

But that's not really what matters the most today for today's conversation. I'd like to turn it over to, again, Alex and to Omid and hear directly from Alex, vice president of Global Customer Support at Fivetran about his experiences and Omid, our chief customer officer of SupportLogic will take us through that part of today's session.

Omid, Alex.

## **Omid Razavi**

All right, well, thank you, John, thank you for the introductions and Brenda, thank you so much for the sharing with us some of the surveys which was consistent with what our audience is also providing feedback.

Thank you for your partnership. I'm here with Alex James, our customer for over two years, I work with our customers, as John mentioned, chief customer officer. I'm very fortunate to work with some of the leading support organizations who are looking at support experience as a differentiator for the value they bring for customers.

So we are talking about this important topic, support experience, a force multiplier for your case management system. I'm with Alex, our customer for over two years.

Alex, tell us about yourself and your experience running support at Fivetran.

## **Alex James**

Yeah. So I've been at Fivetran for just over two years now and been running the support and success organization for all of that time.

And prior to that, I've been a number of enterprise and startup companies running support services as even a developer back in the day. So please never ask me to write any production code other than SQL, because I'm more of a data guy now.

But yeah, we've been using SupportLogic for just over two years now, and yeah, it's something that's the part of our everyday life within support.

But also we have some of our account managers in here as well, so it's starting to be used by more people than just support.

## **Omid Razavi**

Awesome. And about your company, Fivetran, you're a fast growing unicorn in the startup world and you're building automated data pipeline for now thousands of customers, right?

Over the course of our two years relationship, I see that you've added several thousand customers already.

## **Alex James**

That's right. Yeah, I think because we are a hypergrowth company, which means we double our customer base every year, there's a lot of things that needs to change within your business and what you cannot do when you are growing that quickly is to forget about supporting your customers.

That's the number one thing, because you want to retain as many customers as possible and if you're looking it from a revenue perspective, when you invest in acquiring that customer base as you're growing, it's very expensive to lose customers and you want to provide your brand promise.

And specifically with Fivetran, customers are using our automated data pipelines to bring in data so they can use it in to drive their businesses.

And we want to minimize any issues that they have, we don't get many, which is, which is great, but we want to make sure that we are able to identify the priority cases very, very quickly.

## **Omid Razavi**

Awesome. And as your customers grow, obviously you cannot grow linearly by adding staff so I'm sure our audience is very interested in how you're actually managing scaling hopefully with the team that you have through automation and AI.

## **Alex James**

Yeah. That was kind of a key driver for the last year for myself and we will continue to do that. So we take insights from SupportLogic of how we can really address, not only the prioritization of an escalation or something as likely to escalate, but also understanding the customer sentiment.

So we use this to really understand the silent sounds, right? Because we've all been there when you are just using your case management software and you only know there's a big problem when there's four or five people knocking on your office door or slacking you, whatever it may be.

But here you can actually look at the overall kind of quality of your service to your customers and how they're responding. So that allows me to very, very quickly look at accounts that we need to maybe engage our account managers to rebuild anything that might not have gone well.

Again, we don't have to do that very often because we have invested in SupportLogic to make sure that is not a problem for us, but it's being able to see, I call it the silent triggers.

I'm sure, Omid, you have the SupportLogic term for it but for me it's the quiet things that allows me to react and train my team on.

## **Omid Razavi**

That is true. I mean, a lot of times, in the olden days, I remember the customer who was loudest, who actually not only opened a ticket, raised their issue, but also called multiple people, they would get the highest attention.

But what you mentioned is that, I mean, there's a lot going on in the conversation between the customer and your support engineers. And there are a lot of signals that customers actually emit through the conversations and that would give indication of frustration, indication of whether they're happy with the way it was going.

They provide you feedback about your support engineer, the interaction with the product features, even your brand, that a lot of times us in support are not privy to it because we are so focused on resolving and closing customer ticket.

But now having a sort of real time dashboard as to what is happening with the customer sentiment and being able to respond to it, as your team has so efficiently been able to do, I think that is a game changer.

## **Alex James**

Yeah, absolutely. And we do have people in our team who are escalation managers just to give that level of care for our business.

## **Omid Razavi**

Yes.

## **Alex James**

And one of the comments that they've said to me is I wish I had this predictive escalations at the beginning part of my career because you don't have to hunt, you actually get presented with a priority list and the more you use it, the more you train the AI engine, so be specific to your use case or to the behavior that you want to drive.

So yeah, it's invaluable and we had to actually change something a little while ago and it wasn't like we had any issues, but the team couldn't use SupportLogic, my leadership team couldn't use it for a day and they felt like they had their right arm chopped off.

And it's like, right, it's essential to how we run our business, especially when you are in a high pressure environment. Support is never off duty and everything is urgent and it's making sure you provide the right level of service to everyone in the right order.

## **Omid Razavi**

Well, thank you so much, I want to say as our customer, for having the trust in us, working with us and it's been an amazing journey for us together for the last two years. And it's music to hear that we know that we could be such a critical component of your overall support tech stack to make an impact.

You mentioned you hired actually some escalation managers, I had a fortune of actually meeting with your new hire and the conversation that we had was very interesting because the escalation management, at Fivetran when you have SupportLogic is a little bit different from traditional escalation management.

Which is, typically, those are when the customer has escalated, you do everything that you need to do to resolve the issue. But here you're actually, with the power of predictive, the focus is on preventing escalations and it's a whole different type of workflow, isn't it?

## **Alex James**

Yeah, it is. It's trying not to deal with an escalation, but actually get in front of it, that's the key thing. And when you want to look at how you invest your time in with your support agents and your leadership team or whoever, every single time you have a proper escalation, we think of like old school escalation here, it takes people out of their roles for days.

And what you do not want to do is have a customer be frustrated, losing team members for days. What you'd like to do is get ahead of the escalation, mitigate that time that's being lost and actually it shows the proactiveness of your team and customers respond to that really well.

We are a software industry, right?

## **Omid Razavi**

Yes.

## **Alex James**

Things happen, but it's getting out ahead of it and guiding customers.

## **Omid Razavi**

Excellent. So we talked about escalation, prediction and prevention, customer sentiment and the workflow associated with customer sentiment.

Have you seen any impact downstream in reduction of churn by making support and success more proactive?

## **Alex James**

We have, and I think it's a combination of things, right? Because everyone will claim a good metric. So if you reduce churn, there's about five people that will claim it.

But what we've seen within Fivetran is a 25% reduction in churn, every company will have natural churn, right? It's just the nature of business, but what we've seen is that the technical issues or any of the frustrations have been reduced, and we can directly see that.

We are in the two year window now, so there's only so much we can reduce the churn rate compared to the previous year, but it's maintaining that churn rate from a technical perspective so that for us is very important.

Are there things that we can improve on? Absolutely. When your business grows so quickly, processes change, but customers don't.

And that's the important thing of just making sure you understand that for your customer, the sentiment is really important, and being able to have a list of issues that you would have to go and hunt for is really important for me.

## **Omid Razavi**

Awesome. So let's talk about the other end of spectrum. It's my understanding that Fivetran has a consumption based business model, customers come and join you, and they may start small and they can grow from there, and also the opposite is that they may not stop using.

So what is the role of support in driving consumption and growth of business?

## **Alex James**

So we basically make sure that the service level is maintained and anything that the customer may raise, the sentiment, any frustrations, any friction that we see in their behavior, we actually become the voice of the customer.

So we work with engineering and product to drive that change. So that's kind of how we drive growth and consumption is making sure that our service is as good as it possibly can be.

## **Omid Razavi**

Got it, very good.

## **Alex James**

So for example, Omid, just to kind of show the complexity that we have here, because Fivetran has 200 connectors and we are adding more and more by the day, right?

It's part of our business and what we can do in some of the reporting and with Fivetran, we use Fivetran itself to bring data silos together.

We're able to stitch this data, the insights from SupportLogic, our own data to actually see the connectors and the points where our customers might have some friction.

So we are really using what we call the modern data stack to drive insights and SupportLogic is a big part of that for us.

## **Omid Razavi**

Awesome. So this really SupportLogic plus Zendesk that you actually in inform the product managers, your engineers, about each of the connectors and even features within each of those products, how customers are feeling, what kind of feedback they're providing.

We know that the PMs and engineers, they are obviously working on their own deliverables and they won't necessarily spend a lot of time in the ticketing system, but you can actually make that information byproduct by feature available to them, so they can actually, in almost real time, get a pretty good understanding of how customer feedback are both positive and also for opportunities for improvement.

## **Alex James**

Absolutely. Because at the end of the day, we're all about service. And my team, we have a OKR to provide world class customer service and just to be the best and that's what we do every day.

## **Omid Razavi**

Yeah, I love it, the way you've actually transforming the support organization into a customer engagement center where broader enterprise can benefit from the insights that can be uncovered from support tickets.

Like you said, even the silent customers who may say just a few words, but those words are so meaningful and perhaps contextual for what would mean to a product manager or engineer or.

## **Alex James**

It's even those loud customers them before they get too loud, that's also important because there's the alerting side, which I think is a great side.

What we use here is that if we know a customer has got very urgent issues, we can set up some alerting based on some of their behavior and we can adjust our responsiveness even before they've started an escalation, for example, we know they've raised a ticket and we can address that.

## **Omid Razavi**

Excellent. So wonderful. Alex, speak to me about how your support and sales and account management work together when issues are uncovered through the ticketing system, through SupportLogic.

How would sales and account management would be responding to those issues? And if you could share some of the best practices that you've adopted over the past.

## **Alex James**

Yeah, so it's about keeping people informed is important. We are data company, we would like to share it internally as well, so for example, you might have a particular customer that might have opened two or three cases in a month, right?

It doesn't happen particularly often, but it might do. And what we do is inform our customer success organization that we might want to reach out to this customer, sometimes it's just education, so it's not like there's a problem.

It's like," I would like to know more information about this connector or how we pump things into snowflake." For example. So we can actually then go and provide the education service to allow our customers to use more of Fivetran.

So that's what we do kind of with our customer success organization with sales. It's a similar thing as well, to be honest, we work very closely with the go to market organization to make sure we are matching what's being sold and providing world class customer support is, for me, the number one thing that we need to do.

And that's making sure everyone in the go to market organization is aligned with what we're doing here and share feedback.

## **Omid Razavi**

Got it. We talked a little bit about customer sentiment that can be uncovered in real time through the ticketing system, but also I do know that you rigorously run customer surveys for CSAT and NPS.

Could you speak a little bit about the correlation between sentiment score that you can derive from SupportLogic in real time versus NPS, CSAT and other traditional surveys?

## **Alex James**

Yeah, and I think the important thing here, and the team mentioned it just to start the call off, using CSAT. If you're getting a good response on your CSAT survey, you are getting about a 20% response rate, right?

So you still have 80% of your customers. Now you have no idea what's going on, so if you are able to use natural language processing within SupportLogic, you can actually see your entire customer base through that month or that period that are telling you from the behavior how well you're performing as a service and as a product.

Our CSATs are very, very high, they've increased over the years, but it's the sentiment for the people that don't respond to the survey. I never respond to a survey, ever, and I don't expect everyone to.

So this is where I get the 20% of customers that will respond to me, but there are 100% of customers that.

## **Omid Razavi**

Got it, very interesting. Even you're in support, sometimes how important it is for a support engineer to get the survey and in the B2C we see that they ask you, could you please participate in survey?

You mentioned you may not be responding to all of them or never.

## **Alex James**

Yeah, it's great. I do like the CSAT number, don't get me wrong, being in our industry for as long as it's been around, but it's not your entire customer base.

## **Omid Razavi**

Yes.

## **Alex James**

So you might have a period where a few customers provide you with a bad CSAT and you think, okay, that massively impacts your number.

But if you look at your entire customer base, by the way that they're working with you via the sentiment analysis, you can actually say," We're doing really well overall because the other 80% are having a great experience." So it stops you from thinking I have a performance issue, but you actually isolate that group and think," Okay, we'll just do an approach with that subset of customers to ensure that they're happy, but overall our service is good."

## **Omid Razavi**

Yeah. I mean-

## **Alex James**

Or not, depending on what your customers are saying to you, right? But we, being two years down the track now, and we're in a good place.

## **Omid Razavi**

Yes. I mean, for us too, I think customer feedback is very important, especially when they go and actually describe the problem in a textual manner, then you can actually get a lot out of that.

But at best, you're right, what you're bringing up is that, first of all, it's a lagging indicator, it's typically after the case has been done. So now the whole lot can be done, but it is a sort of validation that you're doing something right during the course of the engagement, even though you get from 20%.

But what is really important to be ahead of the problem, have some leading indicator of how your cases are progressing in real time, which really matters for support.

## **Alex James**

Yeah, it does. And I can reel off a list of stuff that we do, you have customer insights and some of the features that you offer, you have your agent insights, you can identify agent tickets and all of that good stuff with the backlog analysis, it just allows you to see, I guess, the wood through the trees is probably the phrase.

It's allowing you to address customer sentiment, understand what's going on and then really make sure that you are able to drive a great service.

## **Omid Razavi**

Excellent. You mentioned employees, obviously, I mean, we are in a talent pool crunch and the question I have for you, for your support organization, is how has the combination of SupportLogic plus Zendesk impacted your staffing requirements and a skill decisions that you would make to build your team?

## **Alex James**

Yeah, so we are in a different stage of growth than most people because we are hypergrowth. So it's not going to be as typical for X number of customers, we hire this agent and I know a lot of enterprise customers do that.

For us, it's more around identifying any skill gaps that we have. So for example, if we have a number of back and forth with customers or a ticket that's taken a little longer to work, we have a process to go and work with that agent to understand if there's a skills gap, is there some trouble that we have so that we can really quickly address these cases.

Time to resolution is really important. MTTR, yes, there's loads of kind of, I call it bloats, when you're waiting for responses in this so we actually focus on the agent time, so that we can really make sure that we are able to resolve tickets really quickly.

And also if we've got a lot of back and forth, we'll get on a call, we'll get on a call with customers, it resolves the ticket much easier. So if you kind of focus on agent time, the behavior that our agent demonstrate, and you can really spot the areas of your team that require some help.

## **Omid Razavi**

Understood. I know we are also turn on the capability for your team, which is around intelligent case assignment, using AI and machine learning, assigning support engineers to tickets based on their skills, based on their account history, complexity, availability, and time zone.

I do not know if you have actually results to show, but do you have any perspective on how that evaluation is going, Alex?

## **Alex James**

Yeah, we are. There's a few kind of future requests that we've asked for and we've been very fortunate that a lot of the future requests we've asked have come into the products.

Not that I'm asking everyone to raise future requests here, but it's been very good so far. We do have a few kind of test cases that we are working on, but because we have so many connectors, we want to make sure we have a similar experience, a customer has the same agent they work with.

So you can kind of get a premium support type of engagement with having the same type of ticket routed to the same person. So still under evaluation, but it's something very, very important for us because this is how we can make sure that we have the best person for the right ticket.

## **Omid Razavi**

Awesome, thank you. And look forward to having the opportunity to share some of the results that you have with the broader audience. I know that's the feature that is quite in demand amongst our customer base.

I want to go back to very early in the journey that we started, because I know people, they may bring up the whole complexity of implementing a system like SupportLogic on top of Zendesk.

Zendesk, itself, is very simple to implement compared to other CRMs, but also SupportLogic has been, I heard you have a small team of solution architects that help with our customers.

Would you comment on your implementation and onboarding experience, Alex?

## **Alex James**

Yeah, I would say this can maybe sound like a negative, but take it as a positive because one day I knew we'd bought it and the next day we had it and I can't remember for the life of me, what happened, but it was there and it worked.

So yes, we had a few kind of custom things that we wanted, but I can't even tell you how long we spent on the implementation because typically I'd expect weeks and it just was there and I was using it.

So we were provided a number of people to help us with training and onboarding and what some of these reports mean, because whenever you get a new tool, no matter what it is, it takes a little bit of adoption and time to use it effectively.

And that was what I needed and you guys provided that as part of the onboarding process. So yeah, I haven't come back to you since for more training, it's kind of very self explanatory.

So yeah, Omid, you might even remember more than me how long it took because I can't tell.

## **Omid Razavi**

I allotted one week for the implementation and the next week for training, but looks like we were able to do it actually in much shorter time, like you said, in two days.

I want to say also because we are a very loyal customer of Fivetran itself and our integration with Zendesk actually happens through Fivetran, so we had a great familiarity. Your team had it as well and that's why probably we were able to turn it on overnight.

And you have a very astute team of support engineers and managers who picked up the material very quickly. At that time, I don't think we have even two years ago we had formal training programs, but they picked it up and they ran with it so we are very pleased with the outcome.

You're right, it was pretty fast, also we made some integrations, I think you use Slack internally for collaboration.

## **Alex James**

We do, yeah. So yeah, we use Slack and we have an authorization product as well that allows who can view this data and things.

But yeah, we use Slack, it's very important for us, it helps with our alerting. Obviously we use email, but Slack is the primary tool that everyone uses at Fivetran.

## **Omid Razavi**

Excellent, so that is also for collaboration. At this point, I think I ran out of my questions. It was a pleasure speaking with you, Alex. You've been an amazing partner for us, I always think about a partnership with Fivetran as something that brings a smile with yourself, your team and amazing team that you have around the globe.

I want to turn over actually to question and answer section and perhaps invite back John and Brandon to join us for the Q& A session.

Are they in backstage? All right. Okay.

## **John Kelly**

Alrighty.

## **Omid Razavi**

So the first question is about if you already do an NPS survey, the question is at CSAT, do we need a Zendesk CSAT?

I think this question would be for both Alex or Brandon, if you would like to speak to the importance of Zendesk CSAT.

## **Brandon Tidd**

Yeah. I'll take a stab at that one. And if you have additional questions, please feel free to drop them in the chat or drop them in the Q &A section on the right hand side. So NPS is a great indicator, it's a great broad stroke indicator of how your organization is doing.

This is the on a scale of one to 10, how likely are you to recommend this service to a colleague? So NPS to be a true NPS has to be administered under a very specific set of rules in terms of the frequency and cadence of those asks of the customer.

Versus Zendesk CSAT is much more transactional in its nature, it's really designed to be rating the experience that you had with that agent on that request.

And so they both play side by side and they tell two different stories, and you have to be careful about overserving and oversampling your audience.

And so that's where you have to be careful to do we choose one or the other, or maybe segment out your CSAT to not be for every customer or not use your NPS on every customer.

But we do see them telling different stories. And Alex, I don't know if you have anything to add to that.

## **Alex James**

Perfect answer to be quite frank with you. I would just be repeating what you've just said. Yeah, absolutely agree with you.

## **Omid Razavi**

Excellent. Next question is also about Zendesk. I think some of us attended the Relate conference that they had and they made some announcements around messaging.

Is this just a chat or there's more to messaging than chat? Again, maybe Brandon, you could open this up.

## **Brandon Tidd**

Yeah, for sure. And I love messaging, to me, it's the future of communication as we go into more of this conversational CRM component where we have live interactions happening, but we've always had live interactions happening.

So what's different now? And the question becomes, where are your customers? And so in a traditional sense, they were on your website, they were looking for a contact us button or a FAQ page, but now they're in Facebook Messenger, they're in WhatsApp, they're in Apple Business Messaging.

And so we have to adapt our communication style to meet them where they are, and so where we see the main difference being between chat and messaging in as far as Zendesk is concerned, is chat is much more of that asynchronous, transactional conversation.

It's happening live, it's browser based, it's session based, when you leave that you're done. Versus messaging, if you think about when you message your friends on Facebook messenger, you don't end that conversation, it just kind of goes forever and you come in and out of it and it's more conversational.

And that's really the goal that Zendesk is moving and the industry is moving towards messaging is to make it more about the customer's conversation and the experience of having that conversation with your customers and getting to know them better in a more conversational way and a less transactional way.

## **John Kelly**

Brandon, I share one observation. I mean, as you see different chat and messaging forums like Slack and other, right? And integrating all those disparate systems to try and get that voice of customer extracted from all of the different mechanisms by which people communicate today.

That's the power of some of the tools that we have available to us now, right? The power of AI, the power of ML and NLP, and kind of just saying, where do we take the data points?

How do we extract that unbiased, consistent voice of customer and align all of them as you were talking about there, a couple minutes ago. So, very interesting.

## **Omid Razavi**

Excellent. There's one more question. I think that's for you, Alex, this is coming probably a support leader. They wanted to know what advice do you have for support organizations who are on this road of embarking on SupportLogic plus Zendesk.

## **Alex James**

Yeah. It's kind of make sure you kind of just understand the value proposition because sometimes when you think early escalation alarms, that type of thing, think, okay, you lose one or two customers because you're not responding quick enough.

And if you'd actually retained them, that's for SupportLogic, right? So for me, it's kind of a win- win and I wish that I'd actually done it a little sooner, to be honest.

And yeah, it's a combination that I can't do without. So when we look at Zendesk, we still have things that we will do in there, we can continue developing, building our own apps, for example, but having the early warning systems or any of the insights, super important when you are all about experience, right?

And that's what we want to provide here and ever since I was a kid, I was all about service and helping people and having those early kind of signals allows you to go and just help.

That's all we're here to do and we want to help in a good way, right? And these two tools allow me to do that and yeah, I would just do it really soon.

Get a demo and off you go, basically.

## **Omid Razavi**

Well, thank you, Alex, for your thoughtful comments. Thank you so much. Brandon, same question. What advice do you have for support leaders?

## **Brandon Tidd**

Yeah, I would say be your own customer. When was the last time you called your IVR that you've emailed into your support system to try to see what the customer journey looks like? And you may be surprised with what you find.

I think of SupportLogic kind of being a crystal ball into your customer's future of are they going to be happy? Are they going to be sad? You can't craft a better system for providing a good customer experience than getting more intel on your customers.

That data is everything when it comes to providing that good customer experience and ensuring that and following that customer from the very start of the journey and seeing it through, through the end of their journey.

And maybe even beyond that in follow- ups is going to be what makes business succeed in 2022 and beyond.

## **Omid Razavi**

Excellent. Thank you. Any closing comments?

## **Brandon Tidd**

Alex, I'll differ to you?

## **Alex James**

Yeah. I just want to say thank you for hosting me today. It's great to work with our partners and yeah, please, if anyone ever wants to reach out, I'm on LinkedIn, Alex James 2, I think is my handle, but yeah.

Very nice to talk to you.

## **Omid Razavi**

Thank you Alex.

## **Brandon Tidd**

I think I'm the only Brandon Tidd on LinkedIn, but you can find me there as well. It's a pleasure talking with you guys today.

## **Omid Razavi**

Great. And thank you, John.

## **John Kelly**

Thank you, enjoyed it.

## **Omid Razavi**

Goodbye.

## **Brandon Tidd**

Take care.