

Elion

Buyer Review Transcript

Product Reviewed	Zendesk
Reviewer Tech Stack	Forethought, Notion
Other Products Considered	Salesforce, Kustomer
Date	Aug 29, 2023
Expert Role	VP of Operations
Organization Type	Direct-Pay Healthcare Organization
Payment Model	Cash Pay

So today, we're chatting about Zendesk and how it's used at your company. Before we jump into that, could you give a brief overview of the company and your role there?

We're a company that aims to make healthcare services more accessible and affordable for patients all over the country. We provide a transparent direct-pay option for those who either don't have insurance or prefer not to use it. This is especially helpful for those in need of immediate care or those with high deductible insurance plans. With our system, patients can know in advance how much each visit will cost and pay up front in cash. We offer a wide range of healthcare services, including virtual care, dental visits, primary care, and annual exams.

I've been with the company for over four years, initially managing our provider accounts and strategy team. Two and a half years ago, I also took on the responsibility of leading our customer service team, allowing me to oversee both customer and provider operations.

How long have you been using Zendesk?

We've had a license for about five years. There was a brief period where we attempted to transfer the customer service system to Salesforce, their CRM, but it didn't go well. The transition wasn't smooth. So in the end, we switched back to Zendesk.

What drove the need for Zendesk's customer service CRM?

Primarily ticketing. We also use their phone feature. We initially tried their chat feature, but now we work with a chat company that integrates with Zendesk.

Zendesk is our primary tool for running and managing customer service inquiries. Although I didn't choose to purchase it initially, I have decided to continue using it. I have considered other vendors, but ultimately, find Zendesk to be the most intuitive customer service platform. Training is easy, and it can be easily scaled for teams. It's a one-stop shop with respect to customer service products, whether it's phone features, email ticketing, or chat ticketing. They will also sign a BAA making it a good option for healthcare organizations. Overall, it has proven to be a reliable, intuitive, simple, and user-friendly system for running a customer service team in the healthcare space.

What primary workflows or use cases do you use Zendesk for?

With our model, we essentially serve two types of customers: patients and providers. The clinicians list with us and use our platform to see patients. However, the majority of our daily users are patients seeking care and booking appointments. Given the interaction between providers and patients, it's natural to have questions, issues, and feedback about the entire healthcare experience, from before the visit, during the visit, and after the visit.

About 80% of our usage of Zendesk is dedicated to managing patient inquiries. Patients can reach out to us 24/7 through phone, email, or chat, and Zendesk acts as the main receiver for these communications. All phone calls, emails, and chat messages are directed through the Zendesk platform. This is our primary way of utilizing it on a daily basis. We've also implemented a separate workflow for managing communication with clinicians. When clinicians contact us via email or phone, we utilize Zendesk to ensure that all touch points and questions from clinicians are properly tracked by our accounts team.

What are the key requirements that you were looking at when evaluating potential alternatives?

I'll just list a few in no particular order. First, scalability is a major factor for us. It's crucial that the product can handle our growing needs. Additionally, ease of use and training are important, especially for our customer service teams in the healthcare industry. Since we aim to keep our staff lean, it's important that the tool is easy to train and manage so that everyone feels comfortable using it. Both the end user and our internal team should find it intuitive and straightforward to use.

Another significant parameter is data and analytics. We need to be able to tailor the system ourselves without relying heavily on consultants or tech support from Zendesk. This allows us to ensure it fits our operations as well as possible.

Cost is always a factor to consider as well. While looking at the ease of use and ability to self-manage the tool, we need to ensure that the cost is reasonable and competitive compared to other options available.

In the healthcare industry, we deal with a lot of protected health information (PHI). Since we get numerous questions and interactions related to PHI, it's essential that any vendor we use has the necessary security capabilities and can sign business associate agreements.

Have you looked at other vendors, and how did they compare to Zendesk?

Yeah, we were considering switching our customer service to Salesforce at one point. Anyone in sales, business development, or customer service knows about Salesforce. It's an amazing product, but building and managing it on your own without outside consultants can be really challenging. Salesforce directs you to various third parties and companies, so you end up having to pay more to build and configure what you need and then manage it indefinitely. This just wasn't sustainable for our company size. We felt it was a waste of money because it didn't provide the additional capabilities we needed. So when the team started implementing it and realized it was way too complex and not user-friendly, we ultimately decided not to transition from Zendesk to Salesforce. And in my experience with Salesforce at another company years ago, it was a bit clunkier and not as intuitive on the ticketing side compared to Zendesk.

I've also done some initial scoping with other companies like Kustomer, which is probably the other major player in this space. It's been a while since I did the demo with them, about a year and a half ago, but I do remember that you couldn't customize your phone tree and system within their platform. There were also some other features that felt a bit disjointed compared to Zendesk. With Zendesk, you get pretty much everything you need for customer service operations all in one place, which is convenient for getting started. The limitations I saw with Kustomer made me hesitant to transition to their platform, even though the interface looked good and seemed as user-friendly as Zendesk. Ultimately, it just wasn't as comprehensive or convenient as we would have liked.

Why were you considering moving from Zendesk to Salesforce?

It made sense, given our circumstances at the time. Our main focus was on using Salesforce for managing accounts and clients on the provider side. We wanted to align both sides and consolidate everything under one system. We thought it would make it easier to handle questions and have all the data and touch points with patients and providers in one place.

Looking back, we realized it was more of an operational challenge than we anticipated. Instead of moving the entire customer service department to Salesforce, it would have been better to have the accounts and sales teams utilize Zendesk more. Our primary goal was to centralize data, but the transition to Salesforce turned out to be a disaster. We had to hire a third party to help with the implementation, since Salesforce couldn't provide the support we needed. Configuring it was quite challenging, and it became clear that Salesforce wasn't the right fit for our organization's size.

In terms of Zendesk itself, how would you characterize the strengths and weaknesses of the product?

The major strength of Zendesk, in my opinion, is its intuitive nature. It's easy to navigate without requiring a lot of training or back-end configuration. Managing and building the necessary flows and experiences for your team is pretty straightforward. Additionally, accessing data and pulling reports is relatively simple, thanks to its analytics capabilities.

Another significant advantage is that Zendesk is a one-stop shop. If you're a small organization looking to quickly establish your customer service engine, you can easily set up phone, chat, and email functionalities without much configuration or trouble.

As a small organization with limited engineering and data resources, being able to independently access and configure the necessary data is crucial for me. I prioritize focusing on the product and user experience rather than internal operations from an engineering standpoint. Although Zendesk may lack a streamlined macro view, I can still access the data I need effortlessly. This independence is important to me because relying on Engineering to pull or build and maintain different dashboards would present challenges. So that's another thing I like about Zendesk.

Regarding the weaknesses we've experienced so far, on the data side, it's pretty clunky to constantly pull individual reports. You really need to work with your engineering team to extract the data and create a better dashboard. The current system is not great and doesn't scale well. Real-time data is also lacking. While they have an inbound call feature, it's difficult to get a real-time overview of what's happening, such as incoming issues and volume, through live dashboards.

Their customer service is also a weakness. They have grown so big that sometimes it feels like they don't prioritize customer needs. One important feature we've been waiting for is the ability to report on agent availability. We want to know things like how much time a customer service staff member spends on the phones and how many tickets they complete. Although Zendesk has some capabilities, they can't tell us how much time the CS agent has been live on the phones, which should align with our schedules, especially when we're all working remotely. They've promised to roll out this feature, but it keeps getting delayed. So their reliability in delivering on their promises hasn't been great, especially when it comes to customer service or product-related issues.

We've also faced some challenges with them in terms of finances. Like many software vendors, you can add seats all year, but downsizing is not allowed. We had an issue where they overbilled us for some items, and then two account managers left, which caused a delay in receiving a refund. It took about six months of back and forth and trying to get the right people in their finance department to respond. So their customer service is not the greatest, but having a good account manager who can advocate for you can make a huge difference in the overall experience.

Can you clarify how the reporting is both a strength and a weakness?

So the data is there. It's readily available and easy to retrieve. Configuring reports for one-off situations is also simple. However, this can lead to multiple reports focusing on different aspects of operations and customer service. It becomes challenging to create universal views or dashboards that allow for quick glances. Furthermore, the reporting and data can be a bit fragmented, and there may be a delay in obtaining real-time or time-sensitive information during the day.

As for the weakness, Zendesk falls behind in terms of real-time dashboards. Although there is a limited real-time call dashboard, the ability to see all touch points from the customer's perspective in real time is not fully developed.

When comparing Zendesk to Salesforce, the latter is more complex and often requires consultants to build out reports and dashboards. You either need to find experts or become one yourself through training. In contrast, Zendesk is much more user-friendly and intuitive, allowing anyone to create the reports they need with the necessary data.

So it sounds like you use Zendesk's built-in phone system and capabilities. Have you considered using another phone system that integrates with Zendesk?

One of the goals I have for this year is to assess the different vendors available and their capabilities. As we have grown over the past few years, it's becoming important to identify any areas where we may be lacking and find vendors who can provide those needed capabilities. I will be conducting some due diligence regarding our phone system.

Cost reduction is a major focus for us. When I first joined this organization, we were in the early stages of funding. We have been successful in avoiding multiple funding rounds by prioritizing cost efficiency and maintaining a lean team. As an operational leader, one of my priorities is to cut down on software costs while still delivering excellent customer service. Adding the phone feature to our Zendesk license could potentially increase costs, especially considering the number of customer service staff we have.

However, I believe we are at a stage where researching different phone options might be beneficial. There could be additional capabilities and complexities in phone systems and call trees that we may want to consider. But so far Zendesk has fulfilled most of our requirements.

What are the key features that you use with Zendesk?

The key features we use are the three different modes of connecting with our patients and customers: email, phone, and chat. While phone calls are more common in healthcare, email still remains the primary method of reaching out to us. We also offer a chat feature, which is enhanced with the integration of a chat bot, so it's really leveraging Zendesk's technology across all three systems. Our other uses focus on internal operations and teams. Our customer

service team and accounts team utilize Zendesk to manage and triage issues from providers and patients.

What are some strengths and weaknesses about those individual features?

When it comes to phone options, there are plenty of choices available. However, the phone option we have is great for our small team. Since our customer service operation is relatively simple, we are able to do most things with it. We can even create custom lines for partners or other clients, and we have unique phone trees that offer both Spanish and English options. Overall, the phone system is easy to use and has served us well. However, as we grow, we may need to explore other options that integrate with Zendesk, which seems like a 1.0 version of phone trees and systems.

As far as chat, we still use Zendesk chat, but we collaborate with an external chat vendor to implement AI and automatic chat responses for inbound inquiries. When we started using Zendesk, the only way to create automation was to create unique workflows for our top issues, which would have been too manual and wouldn't deliver a great customer experience. The inquiries would likely end up being routed to our agents anyway. So we started working with a third-party vendor called Forethought to integrate their solution into Zendesk chat. We made an investment in this approach, and it has been really effective in deflecting a lot of inbounds and helping people resolve their issues through the chat. But if your volume is low and you just need the chat to route to an agent, Zendesk is perfectly functional.

As for email, I can't think of any obvious issues.

How reliable and stable is the platform?

Overall, it's pretty good. There have been instances of downtime, whether it's due to phone or server issues. However, the team is usually prompt in resolving these problems. Occasionally, agents have to log back in, or they report dropped calls. The challenge lies in determining whether it's an agent internet issue or a Zendesk issue, since everyone is remote. But from a reliability standpoint, it's pretty solid. I can't remember too many times when it was down, and if it was, it was back up quickly.

Have you used their APIs at all, and how was that experience?

I can only speak to this at a high level. In order to integrate with Forethought, we had to utilize an API, which I found to be fairly simple. It's easy for me to extract the required information. The integration process and any developer requirements primarily depend on the vendor, in this case, Forethought. So they're the ones who need to gather more information and collaborate closely with Zendesk to achieve successful integration. Overall, the integration has been going smoothly. The documentation experience has also been pretty good, as I have been able to find the information or keys we need. Likewise, they have been able to access what they require in Zendesk without encountering many issues.

While it may not offer as much customization or the ability to build on top of it, Zendesk does provide a strong capability to integrate various tools and companies. Their app library and vendor library are excellent and have worked well for us so far. For the few tasks we have completed, everything seems to be going well. And if you're interested in creating universal dashboards, our data team has been able to easily extract the data and use the APIs to incorporate it into visualization tools like Tableau or Looker. I haven't seen any issues with the developers I've worked with.

It sounds like there are companies that work with Zendesk, so there's not a lot of building that's required.

Exactly. Zendesk's marketplace offers a wide range of tools and apps that can be easily implemented without the need for developers. For example, our customer service team was able to find tools to deflect inbound requests when someone is on PTO or not working that day. These apps are user-friendly and require minimal effort to set up.

Additionally, integrating external systems like Forethought with chat or routing it through Zendesk has been a smooth process. We haven't faced any major challenges with these integrations.

Do you use Zendesk for knowledge management or the knowledge base, either for internal purposes or for external FAQs that your customers can use?

Yeah, so internally we use Notion as our knowledge base, and it's been great. Our accounts team has created the initial version of the knowledge base for the providers who list on our company. It contains a lot of information on how to use the provider product. Since we have a high volume of customer service inquiries from patients, mostly quick ones like needing help because the provider didn't join the video visit or canceling an appointment, we rely more on the chatbot rather than creating a knowledge base. People usually don't have the patience to read articles in that way. However, for our providers, the basic knowledge base through Zendesk provides them with tips, tricks, product tutorials, and videos on how to use our tooling. I know there are many more things you can do with a knowledge base if you have developer support and time, but for now, we've focused on the basics that don't require any engineering help, and it has worked well for us.

How do you feel about the account management and support that you get from Zendesk?

It depends on your account manager, I would say. And same with support. So the account management contact will rotate a lot, sometimes every three months. I think it's because it's such a big organization, and folks are probably cycling in and out. Some of the managers are really interested in hearing feedback or helping resolve any issues if you need it and are really responsive. I've had a couple that just weren't very interactive, communicative, or responsive at all. So I think it depends, but overall, I've gotten mostly good account managers.

Support is pretty good. It can be tricky to reach someone. Sometimes it's nice to be able to pick up a phone and talk to someone, talk through an issue that you're having, but that option doesn't exist. If you really want to talk to someone, you have to go through your account manager. So you're limited to chat or email with support, and it can sometimes have a lag with response time. I think they're getting a lot of inquiries, so if you have an urgent issue, you really have to shout from the rooftops and escalate, hoping that you get someone. And I've had a few people who've said, "Oh, this is amazing. You're very knowledgeable and helpful about how to troubleshoot XYZ," and then I've had a couple of times where someone just really couldn't figure out how to help us. So it's a little bit of a mix, but you find your way.

Do you feel like you made the right decision with Zendesk, looking back?

Yeah, I think things have gone well. We've scaled a lot, and we eventually pulled our accounts team onto Zendesk. It was an easy choice because it made sense in terms of data management and ticketing for providers. Our customer service team has expanded from three to about twenty people, and we have also outsourced some support to offshore teams. Zendesk has been a great tool, and training new employees on it has never been an issue, which is crucial as we scale our international call center. It's reassuring to know that it meets all the security and HIPAA requirements we need in the healthcare industry.

Looking forward, are there any particular growth areas that you'd like to see for Zendesk?

Yeah, I would say mostly around live reporting and live dashboards, especially in a remote work environment where our customer service agents are located all over the world. It would be really beneficial to have a better view of who's available at their desk, who's online, and the daily volume of incoming requests. Instead of having to generate manual reports or deal with data delays, having real-time reporting would be really helpful. So, yeah, I'd say my main focus would be on improving their reporting capabilities.

Do you have any advice for someone who's going through a vendor selection process for this type of product?

Yeah, I think looking at all the different systems and determining what is most important for your needs. When we were initially building, we found Zendesk to be great and easy to set up and get started. It has also scaled well as we've grown. So you really have to consider the cost and priorities. If cost is a significant factor, and you want a system that combines phone, email, and chat functions without relying on multiple third parties or outside vendors, this option is excellent. However, if you have the flexibility to explore other options or don't have budget constraints, and if developer support is a concern, there might be other alternatives out there. Therefore, it's essential to assess what is realistic for your situation, how much ownership and independence you desire, and make a decision based on that.