

HOW CLICKDIMENSIONS USES MICROSOFT DYNAMICS CRM & ZENDESK

TO DELIVER SUPERIOR CUSTOMER SUPPORT



SUPERIOR CUSTOMER SUPPORT

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Contents

Overview and Background	2
Technologies used in ClickDimensions Support.....	2
Microsoft CRM solution	3
Zendesk Configuration	6
Enriching the view of Customers in Zendesk	7
Zendesk Users	7
Providing Visibility to Support Issues in CRM	10
Capture Support Survey Results in CRM Online	13
Summary	16

Overview and Background

ClickDimensions is a rapidly growing software-as-a-service (SaaS) provider with a customer and partner base that extends around the globe. Our email marketing and marketing automation solution is built as an extension of Microsoft Dynamics CRM, with a comprehensive, Windows Azure-based feature-set that currently supports embedded integration with three releases of Microsoft's customer relationship management product (CRM 4.0 on-premise, CRM 2011 on-premise, and CRM Online). As diverse as the environments are in which our solution is integrated, our users have an even more diverse range of skill levels, business requirements, and goals.

To provide timely and accurate technical support for this diverse user group and install base, ClickDimensions chose to implement Zendesk's cloud-based customer service software. After evaluating numerous options, Zendesk most closely met our criteria for a support desk system based on these priorities:

1. Easy for customers to use
2. Easy for agents to use
3. Minimal maintenance
4. Ability to integrate with our internal implementation of Microsoft CRM Online
5. Ability to customize
6. Ability to automate processes

Another important factor in our selection of Zendesk was that it was able to be immediately implemented at a time when ClickDimensions' technical support staff was one person who had numerous other duties. As ClickDimensions grew into a global enterprise with offices in Atlanta, Fargo and Tel Aviv, and customers in 45 countries, Zendesk has continued to be an excellent match to our priorities as well.

This paper provides an overview of how ClickDimensions has implemented Zendesk to provide technical support and customer service.

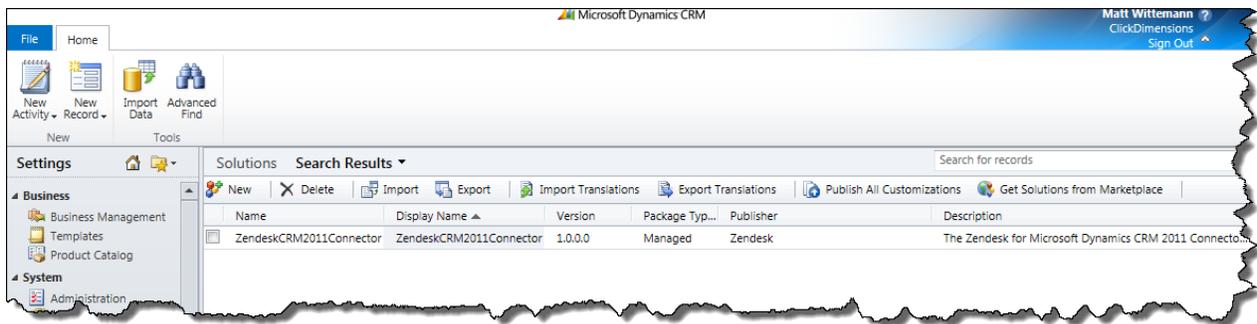
Technologies used in ClickDimensions Support

ClickDimensions uses Microsoft Dynamics CRM Online to store customer and partner data, as well as to track the subscription levels of our customers. We also use Zendesk to handle support requests and customer questions.

Microsoft CRM solution

Zendesk released their Microsoft Dynamics CRM integration solution, the [Zendesk CRM 2011 Connector](#), in 2012. The connector currently supports CRM Online and enables two-way integration of customer service data between CRM and Zendesk.

Zendesk's integration is delivered as a managed solution; a compressed zip file that contains the components needed to extend the CRM application and which makes it easy to install in CRM Online.



The Zendesk solution consists of extensions to some of CRM's system entities, several custom entities to store configurations and mappings, two security roles, and several web resources to provide a mapping interface.

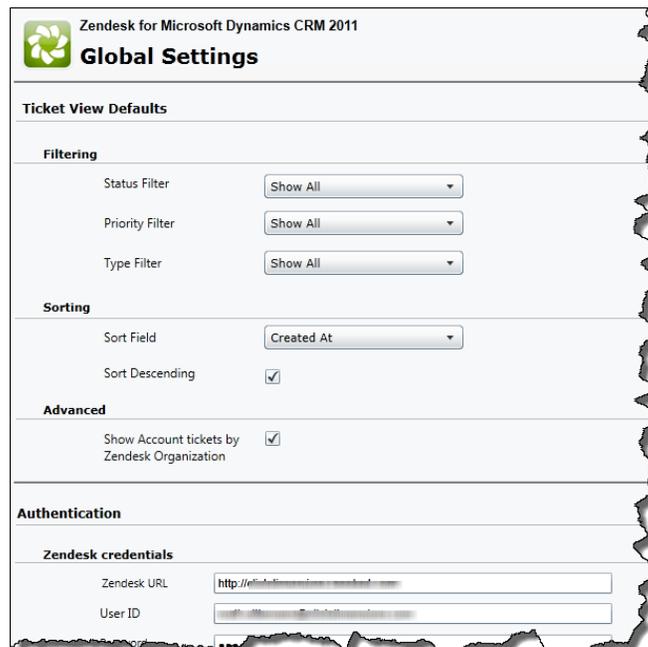
Note: There is also a Silverlight web resource included in the Zendesk CRM 2011 Connector that is intended to be added to a CRM Account form. It is designed to display tickets from Zendesk in a Silverlight grid control on the Account form. We have elected to not implement this portion of the Zendesk solution, since we have also configured our integration to push tickets from Zendesk into CRM Cases. We discuss this part of the integration later in this document.

After installing the Zendesk solution in CRM Online, it is necessary to configure the connection from both Microsoft CRM and from Zendesk. An overview of these settings follows, but full instructions for installing and configuring the Zendesk solution can be found [here](#).

First, in order to pull Zendesk ticket data into CRM cases, the Zendesk solution for CRM includes a settings page where settings, the credentials needed to access Zendesk programmatically, and mapping selections can be configured. After installing the Zendesk solution, you can add the Zendesk configuration page to your CRM's navigation by modifying the sitemap.



The Zendesk configuration page allows you to set up the connection between the two systems.



Zendesk for Microsoft Dynamics CRM 2011

Global Settings

Ticket View Defaults

Filtering

Status Filter: Show All

Priority Filter: Show All

Type Filter: Show All

Sorting

Sort Field: Created At

Sort Descending:

Advanced

Show Account tickets by Zendesk Organization:

Authentication

Zendesk credentials

Zendesk URL:

User ID:

- **Ticket View Defaults:** The filtering, sorting and advanced settings in this section let you determine which Zendesk tickets should be displayed in the optional Silverlight grid you can add to the CRM Account form. Again, we opted not to use this feature
- **Authentication:** Enter your Zendesk credentials to allow CRM to retrieve Zendesk ticket info.

- **Mapped record types:** This allows you to specify which type of data will be displayed in Zendesk when viewing a customer’s profile. For example, if a CRM Contact opens a support ticket, you might want to permit your support team to see the Contact’s company name and job title.
 - **Leads:** Because our technical support is primarily for customers and partners, we don’t often have support requests from Leads. However, if a Lead does submit a support request, we’d like to see their full name and company name in Zendesk, so we’ve selected these fields to be available in our Zendesk interface.
 - **Contacts:** It’s very helpful for a support agent to know who they are talking with so they can provide the right level of detail and tailor their responses accordingly. Pulling in a Contact’s Job Title and the company name from the Contact’s parent account can help provide some of that needed context.
 - **Accounts:** Additional context is provided by displaying the Relationship Type (we carefully track in CRM whether an Account is a customer, prospect, partner, vendor, etc.). We also store a customer’s Microsoft partner in the Account’s “Parent Account” field. By displaying this in Zendesk, when working with a customer, we can see who their partner is and determine if we need to involve them in the resolution.

Mapped record types

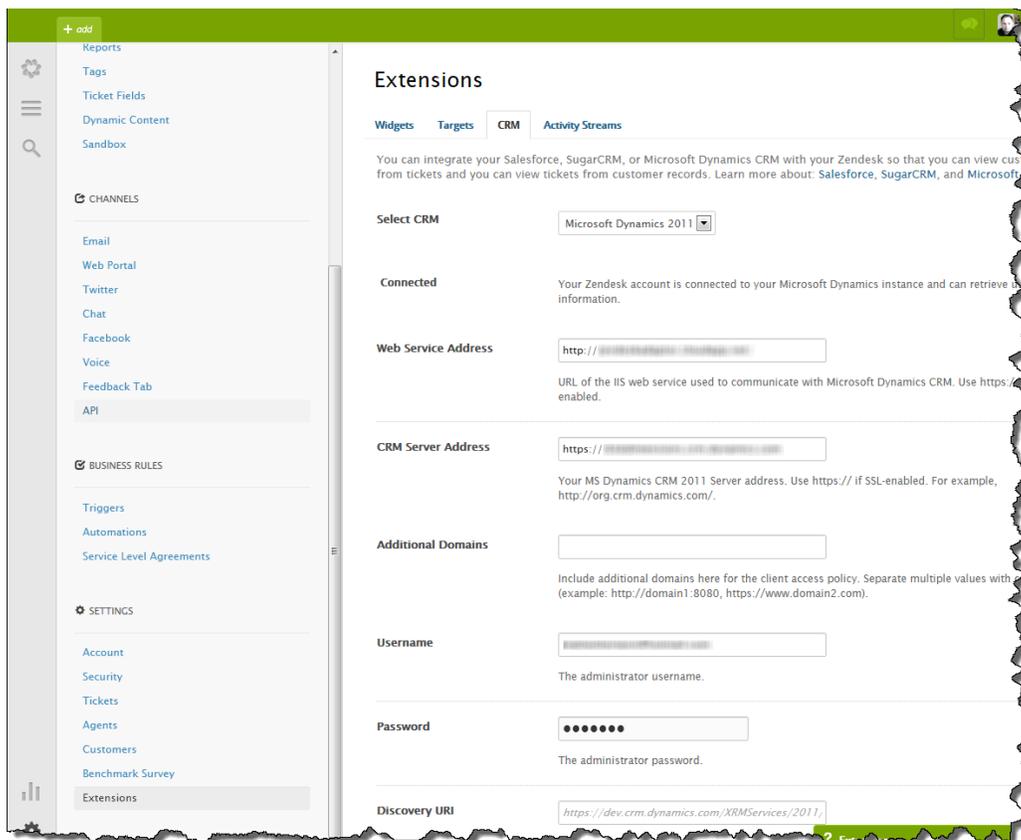
Fields from MS Dynamics CRM record types displayed in Zendesk user profiles

Lead	Address 1: County(address1_county) Address 1: Fax(address1_fax) Address 1: Latitude(address1_latitude) Address 1: Longitude(address1_longitude) Address 1: Name(address1_name) Address 1: Post Office Box(address1_postofficebox) Address 1: Telephone 1(address1_telephone1)	>> <<	Company Name(companyname) Name(fullname)
Contact	Address 1: Address Type(address1_addresstypecode) Address 1: City(address1_city) Address 1: Country/Region(address1_country) Address 1: County(address1_county) Address 1: Fax(address1_fax) Address 1: Freight Terms(address1_freighttermscode) Address 1: Latitude(address1_latitude)	>> <<	Job Title(jobtitle) Parent Customer(parentcustomerid)
Account	3-Month Review Complete?(cdi_3monthreviewcomplete) 6-Month Email Sent?(cdi_6monthemailsent) 9-Month Email Sent?(cdi_9monthemailsent) Account Number(accountnumber) Account Source(cdi_accountsourc) Account(accountid) Additional Contacts(cdi_additionalcontacts)	>> <<	Account Name(name) Parent Account(parentaccountid) Primary Contact(primarycontactid) Relationship Type(customertypecode)

- **Ticket-to-Case Mapping:** This section allows us to configure where Zendesk ticket data will be stored when our integration creates a Case in CRM.
 - **Zendesk Ticket Status:** We've opted to map this to the CRM Case entity's "Case Stage" field, which we've modified to have corresponding values: New, Open, Pending, Solved, Closed.
 - **Zendesk Ticket Priority:** The out-of-the-box CRM Case field "Priority" works nicely for this. We've mapped Zendesk's ticket priorities to the out-of-the-box values in the CRM Priority field.
 - **Zendesk Ticket Type:** Zendesk has different types of tickets and the way tickets are handled by agents can vary depending on the type of ticket. Because of this, we've modified the CRM "Incident Type" field to have values that correspond to Zendesk's options of Question, Incident, Problem and Task.

Zendesk Configuration

After we installed the Zendesk CRM 2011 Connector solution in our CRM, we needed to log into Zendesk to provide connection information so the support desk system knows how to connect with CRM in order to create CRM Cases when a Zendesk ticket is created. In Zendesk, navigate to Extensions and click the "CRM" tab. Select Microsoft Dynamics 2011 and complete the rest of the form.



The screenshot shows the Zendesk interface with the 'Extensions' page open. The left sidebar contains navigation options like Reports, Tags, Ticket Fields, Dynamic Content, Sandbox, CHANNELS, BUSINESS RULES, and SETTINGS. The main content area is titled 'Extensions' and has tabs for Widgets, Targets, CRM, and Activity Streams. The CRM tab is active, showing a form for configuring the Microsoft Dynamics 2011 integration. The form includes fields for Select CRM (Microsoft Dynamics 2011), Web Service Address, CRM Server Address, Additional Domains, Username, Password, and Discovery URI.

Extensions

Widgets Targets **CRM** Activity Streams

You can integrate your Salesforce, SugarCRM, or Microsoft Dynamics CRM with your Zendesk so that you can view customer records from tickets and you can view tickets from customer records. Learn more about [Salesforce](#), [SugarCRM](#), and [Microsoft Dynamics CRM](#).

Select CRM

Connected Your Zendesk account is connected to your Microsoft Dynamics instance and can retrieve information.

Web Service Address URL of the IIS web service used to communicate with Microsoft Dynamics CRM. Use https:// if enabled.

CRM Server Address Your MS Dynamics CRM 2011 Server address. Use https:// if SSL-enabled. For example, http://org.crm.dynamics.com/.

Additional Domains Include additional domains here for the client access policy. Separate multiple values with a comma (example: http://domain1:8080, https://www.domain2.com).

Username The administrator username.

Password The administrator password.

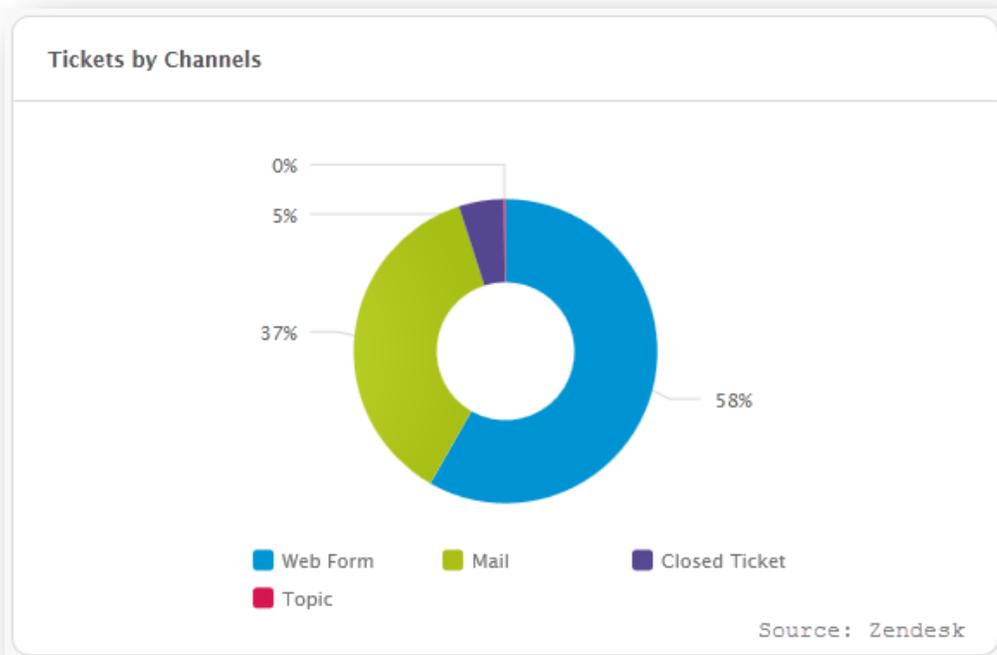
Discovery URI

The user credentials entered here are your CRM user credentials. Since we use CRM Online (pre-Office 365), our credentials are the LiveID of a CRM user with a security role that permits the creation of Cases and reading of Account, Contact and Lead information.

With these integrations set up, we are now able to enrich the view of customers in Zendesk with data pulled from CRM Online, and provide visibility to our sales team of customer issues.

Enriching the view of Customers in Zendesk

ClickDimensions customers request technical support through a variety of channels, from traditional channels like email and telephone requests, to more informal channels like Twitter and chats initiated on our website. However, the vast majority of requests are submitted through our [support website](#) (58%) and emails sent to support@clickdimensions.com (37%):



Zendesk Users

Zendesk makes it easy for our customers to register and access the support site. Based on the user's email address, Zendesk will set up a user account for them, and will group them with other users from the same organization.

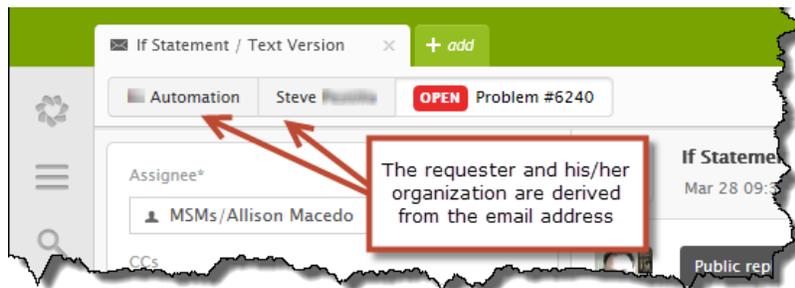
Zendesk user accounts get created in one of two ways:

- Visit the support site at <http://support.clickdimensions.com> and register

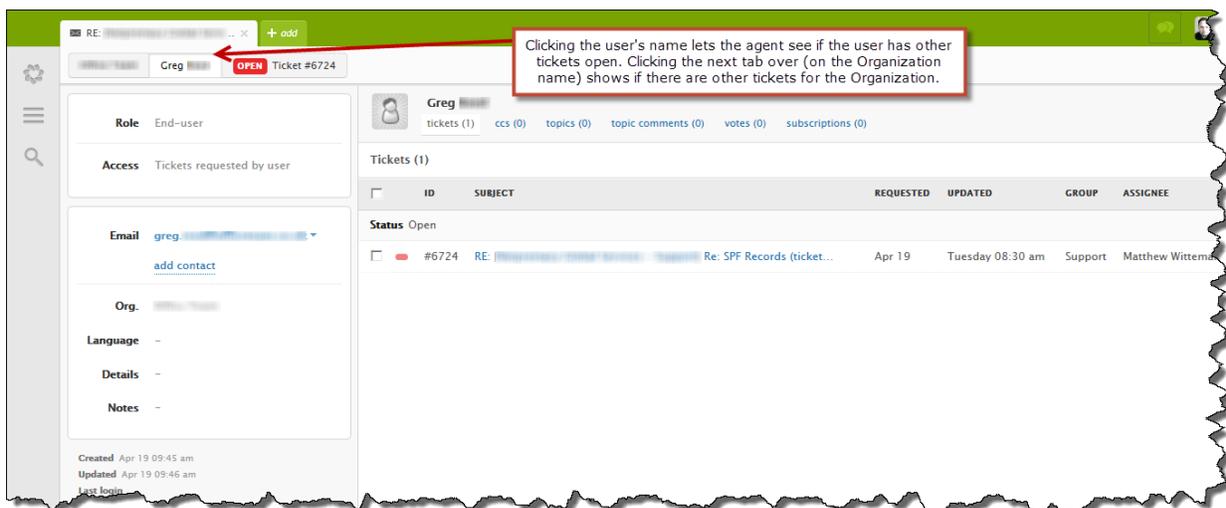
- Send an email to support@clickdimensions.com. Zendesk will automatically create a user account and send a reply email with a link to complete the user registration.

After a user creates a Zendesk user account, subsequent support requests and communications are then associated with the individual's Zendesk user account. If a support request is submitted via email, and other people are cc'ed on the email, Zendesk uses the email addresses to identify the individuals involved in the ticket. If any email addresses submitted are not associated with Zendesk user accounts, Zendesk will automatically create accounts for them. The users will receive automatic responses from Zendesk inviting them to log into the support site and finish creating their account.

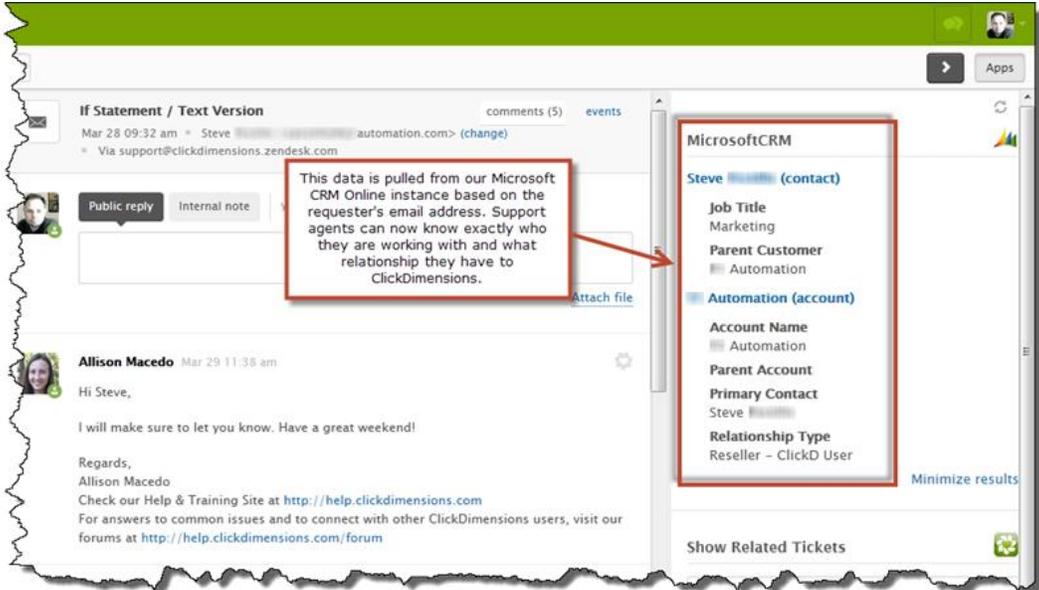
Regardless of the method the customer uses to submit a support request, Zendesk parses out the domain portion of the requester's email address so support tickets and Zendesk users can be grouped by organization as determined by their email domain. For example, if the support request was sent from joe@mycompany.com, Zendesk will treat all emails and support requests from users at 'mycompany.com' as belonging to the same organization and group the tickets accordingly:



From the Zendesk interface, agents can see if the individual user or his/her organization has other tickets with similar requests. This is another way that agents can gain context when working on a technical support issue.

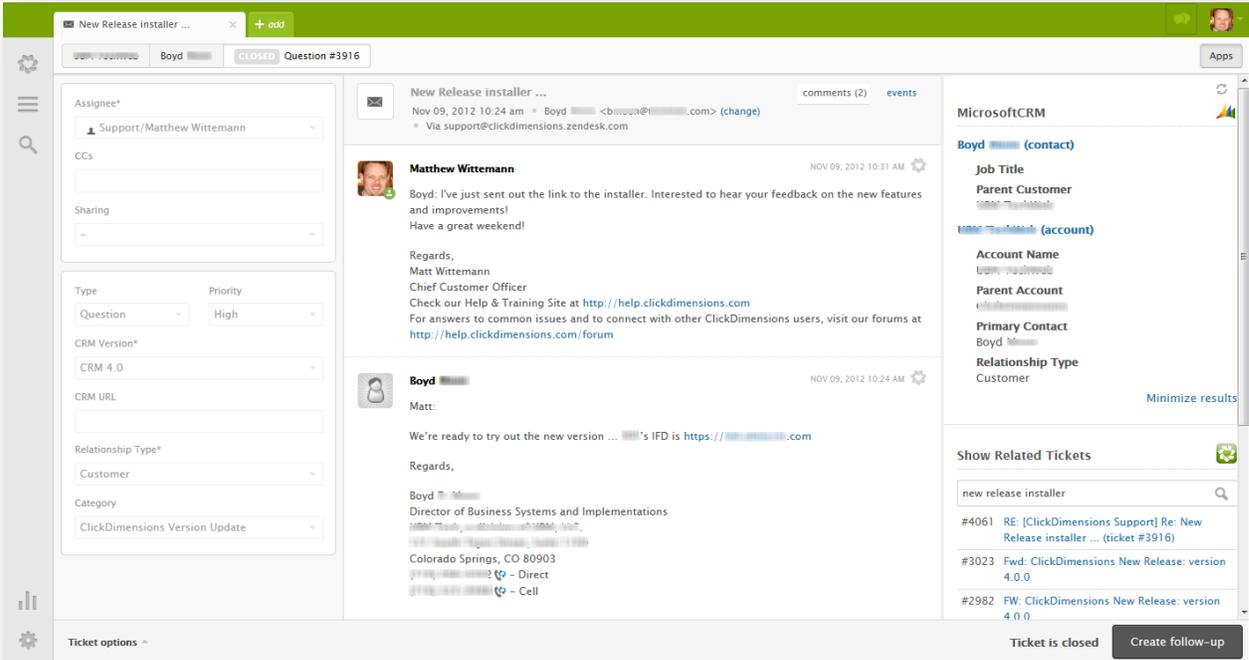


With Zendesk integrated to our instance of Microsoft Dynamics CRM Online, once a customer or partner is identified on the Zendesk site, the CRM integration also searches for them in our CRM Online instance and returns any relevant information where it is easy for a support agent to see:



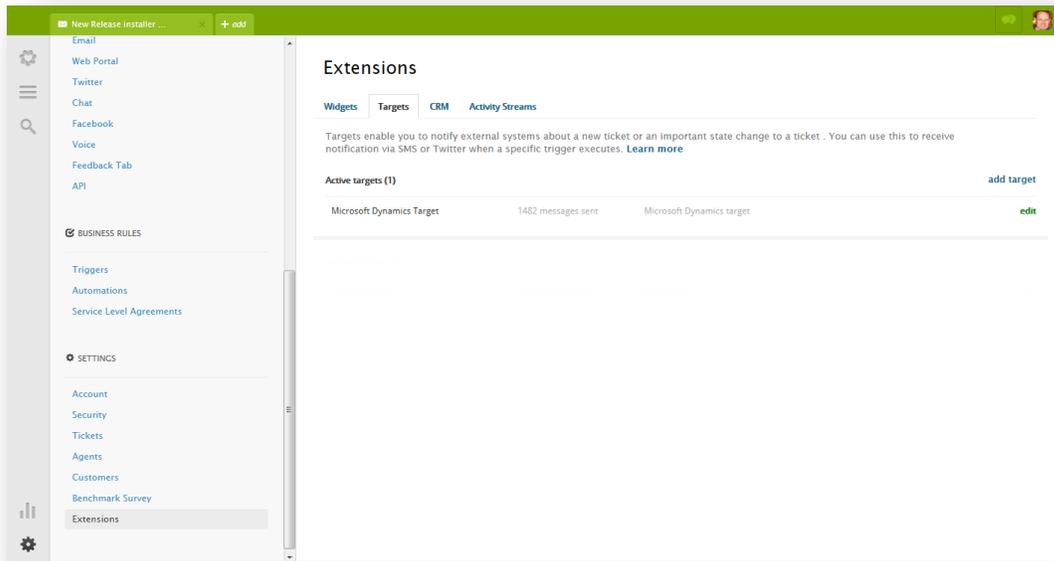
This enriched view of a customer or partner within Zendesk enables our support agents to have greater context and understand the relationship we have to the requester.

Another example of the enriched view an agent has from Zendesk, showing the entire ticket view:

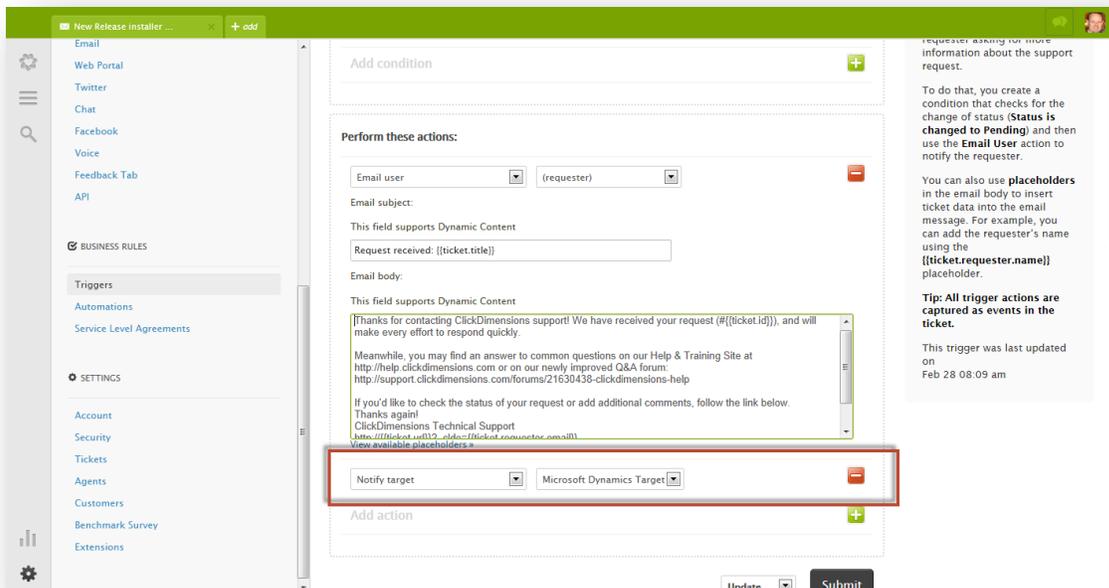


Providing Visibility to Support Issues in CRM

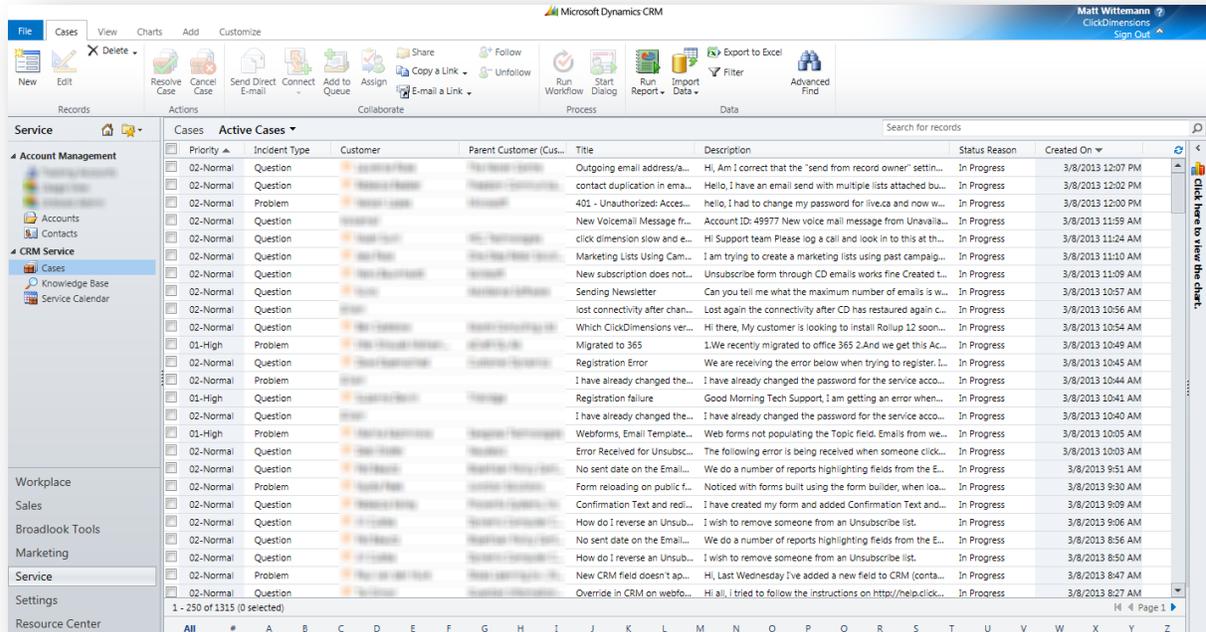
Zendesk has the ability to set what it refers to as “targets”. Targets in Zendesk are external systems where data can be pushed. With the CRM integration set up, we can set up Microsoft CRM as a target system.



Using “triggers” in Zendesk, we can define which actions will push data to the target. We have defined a target that creates a Case record in CRM whenever a support request is received in Zendesk:



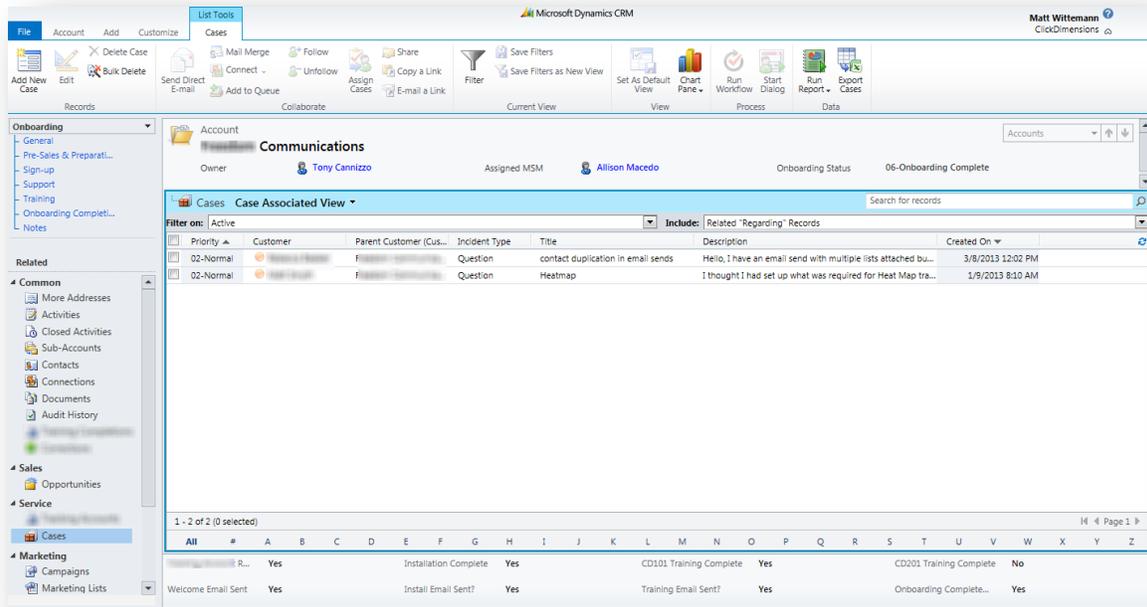
In Microsoft CRM, the Cases are automatically linked to the appropriate contact by the Zendesk integration, based on the Contact's email address. Below is a view of cases that were recorded in Microsoft CRM:



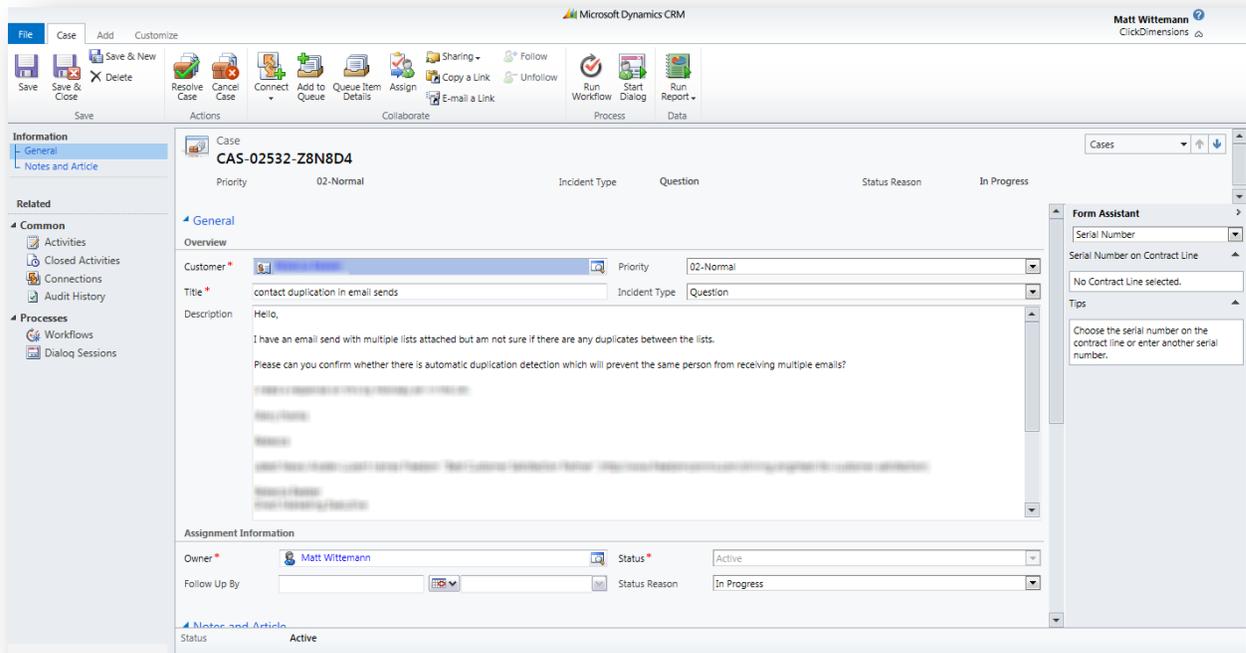
Priority	Incident Type	Customer	Parent Customer (Cus...)	Title	Description	Status Reason	Created On
02-Normal	Question	Customer Name	Parent Customer	Outgoing email address/a...	Hi, Am I correct that the "send from record owner" settin...	In Progress	3/8/2013 12:07 PM
02-Normal	Question	Customer Name	Parent Customer	contact duplication in ema...	Hello, I have an email send with multiple lists attached bu...	In Progress	3/8/2013 12:02 PM
02-Normal	Problem	Customer Name	Parent Customer	401 - Unauthorized: Acces...	hello, I had to change my password for live.ca and now w...	In Progress	3/8/2013 12:00 PM
02-Normal	Question	Customer Name	Parent Customer	New Voicemail Message fr...	Account ID: 49977 New voice mail message from Unavalla...	In Progress	3/8/2013 11:59 AM
02-Normal	Question	Customer Name	Parent Customer	click dimension slow and e...	Hi Support team Please log a call and look in to this at th...	In Progress	3/8/2013 11:24 AM
02-Normal	Question	Customer Name	Parent Customer	Marketing Lists Using Cam...	I am trying to create a marketing lists using past campaig...	In Progress	3/8/2013 11:10 AM
02-Normal	Question	Customer Name	Parent Customer	New subscription does not...	Unsubscribe form through CD emails works fine Created t...	In Progress	3/8/2013 11:09 AM
02-Normal	Question	Customer Name	Parent Customer	Sending Newsletter	Can you tell me what the maximum number of emails is w...	In Progress	3/8/2013 10:57 AM
02-Normal	Question	Customer Name	Parent Customer	lost connectivity after chan...	Lost again the connectivity after CD has restored again c...	In Progress	3/8/2013 10:56 AM
02-Normal	Question	Customer Name	Parent Customer	Which ClickDimensions ver...	Hi there, My customer is looking to install Rollup 12 soon...	In Progress	3/8/2013 10:54 AM
01-High	Problem	Customer Name	Parent Customer	Migrated to 365	1,We recently migrated to office 365 2,And we get this Ac...	In Progress	3/8/2013 10:49 AM
02-Normal	Question	Customer Name	Parent Customer	Registration Error	We are receiving the error below when trying to register. L...	In Progress	3/8/2013 10:45 AM
02-Normal	Problem	Customer Name	Parent Customer	I have already changed the...	I have already changed the password for the service acco...	In Progress	3/8/2013 10:44 AM
01-High	Question	Customer Name	Parent Customer	Registration failure	Good Morning Tech Support, I am getting an error when...	In Progress	3/8/2013 10:41 AM
02-Normal	Question	Customer Name	Parent Customer	I have already changed the...	I have already changed the password for the service acco...	In Progress	3/8/2013 10:40 AM
01-High	Problem	Customer Name	Parent Customer	Webforms, Email Template...	Web forms not populating the Topic field. Emails from we...	In Progress	3/8/2013 10:05 AM
02-Normal	Question	Customer Name	Parent Customer	Error Received for Unsubsc...	The following error is being received when someone click...	In Progress	3/8/2013 10:03 AM
02-Normal	Question	Customer Name	Parent Customer	No sent date on the Email...	We do a number of reports highlighting fields from the E...	In Progress	3/8/2013 9:51 AM
02-Normal	Problem	Customer Name	Parent Customer	Form reloading on public f...	Noticed with forms built using the form builder, when loa...	In Progress	3/8/2013 9:30 AM
02-Normal	Question	Customer Name	Parent Customer	Confirmation Text and redi...	I have created my form and added Confirmation Text and...	In Progress	3/8/2013 9:09 AM
02-Normal	Question	Customer Name	Parent Customer	How do I reverse an Unsub...	I wish to remove someone from an Unsubscribe list.	In Progress	3/8/2013 9:06 AM
02-Normal	Question	Customer Name	Parent Customer	No sent date on the Email...	We do a number of reports highlighting fields from the E...	In Progress	3/8/2013 8:56 AM
02-Normal	Question	Customer Name	Parent Customer	How do I reverse an Unsub...	I wish to remove someone from an Unsubscribe list.	In Progress	3/8/2013 8:50 AM
02-Normal	Problem	Customer Name	Parent Customer	New CRM field doesn't ap...	Hi, Last Wednesday I've added a new field to CRM (conta...	In Progress	3/8/2013 8:47 AM
02-Normal	Question	Customer Name	Parent Customer	Override in CRM on webfo...	Hi all, I tried to follow the instructions on http://help.click...	In Progress	3/8/2013 8:27 AM

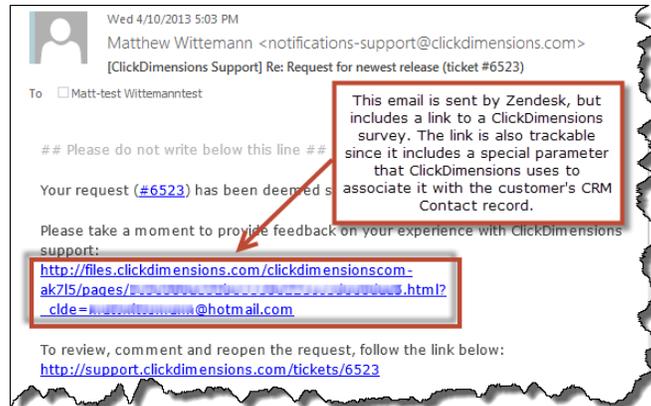
At this point, if we wished to use CRM's workflow abilities to alert the customer's account manager or take other actions based on the creation of the case record, it would be very simple to do. Our main goal with this integration, however, is simply to provide visibility to the sales team of customer issues.

When an account manager is reviewing a customer's Account record in CRM, he or she can easily see the history of support requests, since CRM rolls them up automatically from the Contact level to the Account level as shown in the following screenshot:

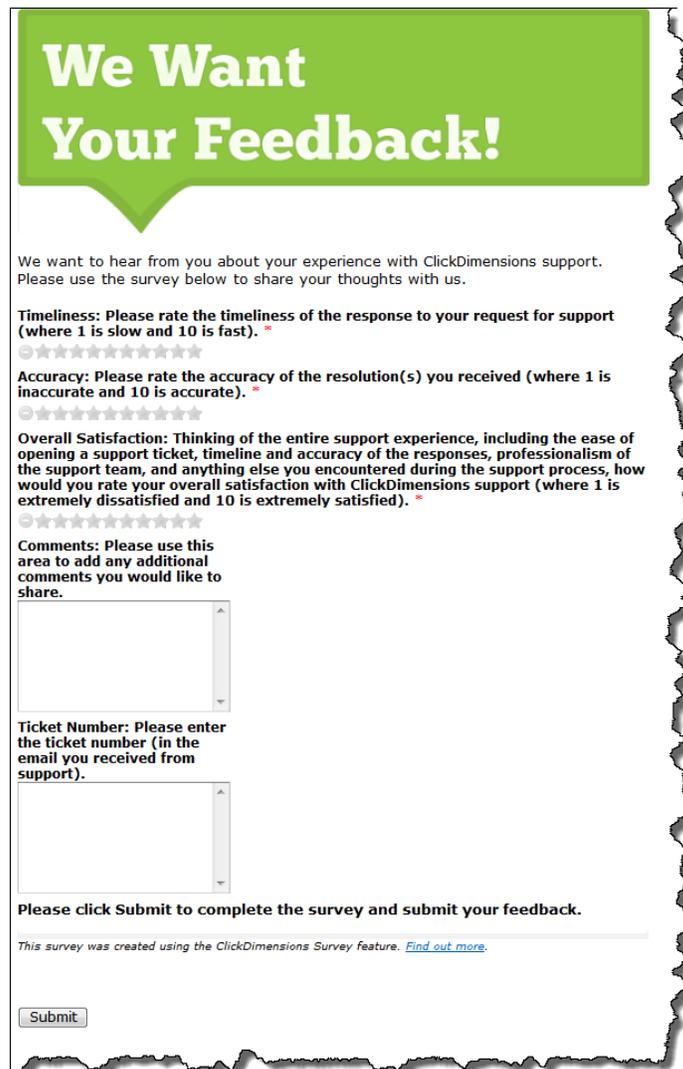


The Zendesk trigger also pushes the subject and body of the support ticket into the CRM Case record's Title and Description fields and uses the mappings we defined earlier to set the Incident Type, Priority, and Case Stage values. Opening a Case record in CRM reveals these additional details from the Zendesk support request in a way that is helpful to the account manager in understanding the customer's issues:

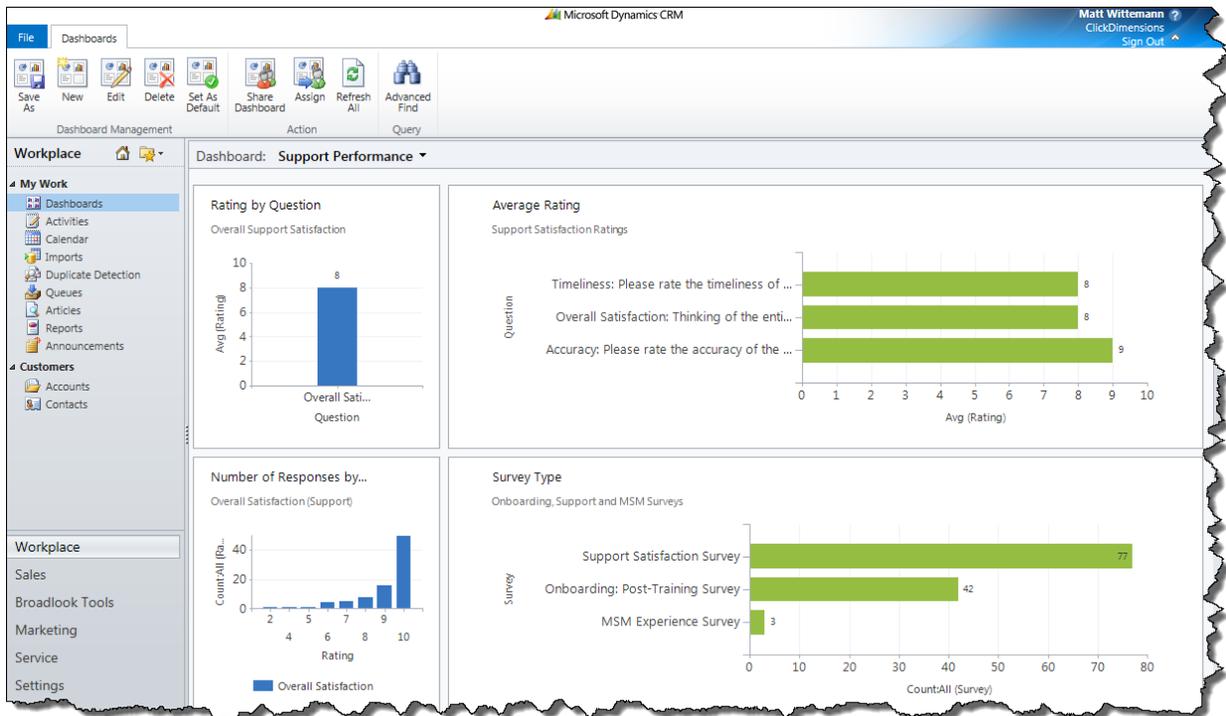




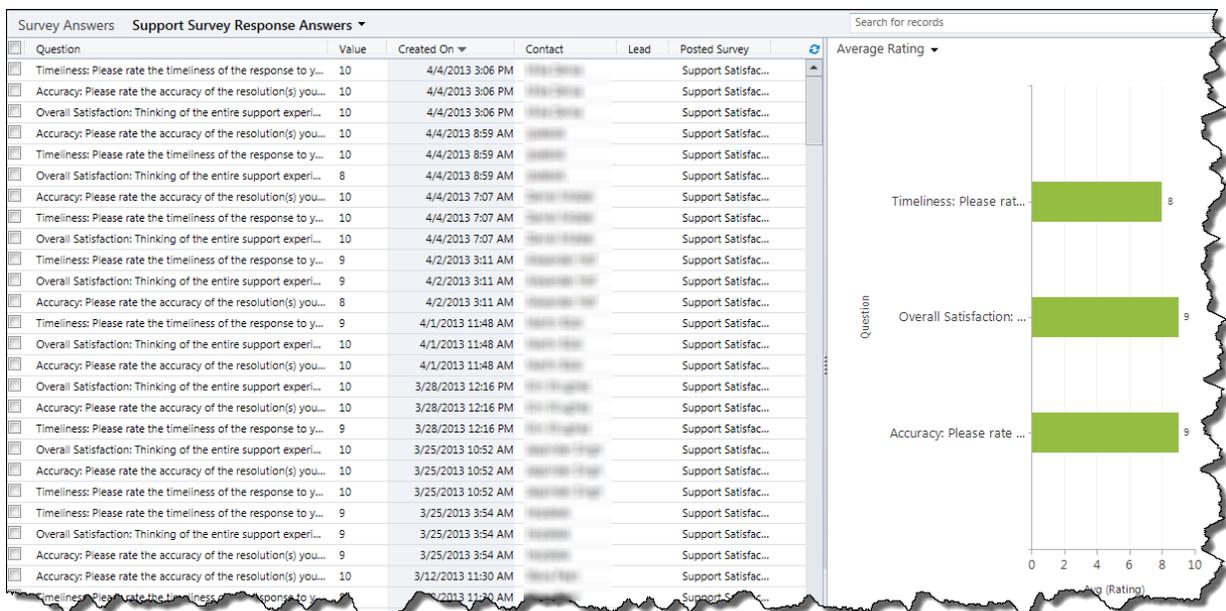
The survey enables customers to rate the technical support agent who helped them on the agent's timeliness, accuracy and overall performance:



The survey results are posted back into CRM, linked to the Contact, and viewable by management on our support performance dashboard. On this dashboard, we can see the average rating for overall satisfaction; average ratings for timeliness, satisfaction, and accuracy; and counts of responses to support satisfaction surveys and other related surveys:



We can also get a more detailed view by looking at Survey Answers by question or customer:



Summary

Hopefully you have found this guide helpful in thinking about your own implementation of Microsoft CRM for customer service and the possibilities that are available when using powerful integrated solutions like ClickDimensions and Zendesk. If you have any feedback or thoughts about the material we've covered please send us an email at info@clickdimensions.com.