



CASE STUDY

# Customer Service Team Boosts CSAT and Productivity with ActivTrak and Zendesk

A rapidly growing SaaS provider with over 5,000 customers and a high Net Promoter Score® needed to optimize team performance and find ways to scale capacity and throughput without adding additional headcount. At the same time, they were committed to keeping their customers happy through quick, high-quality technical support.

Using integrations between ActivTrak, Zendesk and Intercom, they were able to create a unique productivity dashboard which helped them improve their customer service agent capacity, lower costs of hiring and training and improve hybrid and remote workforce management while maintaining already high expectations for customer service response times and quality.



## Customer Overview

- **Region:** North America
- **Solutions:** ActivTrak, Zendesk and Intercom
- **Industry:** Software-as-a-service
- **Results:** Improved service agent capacity, lowered costs, better hybrid/remote workforce management

## Challenge

The company had established itself as a highly rated service provider with great customer satisfaction scores due to fast and accurate support responses. As they grew, they wanted to maintain and possibly improve these scores. However, they had to be able to optimize team performance and scale capacity without adding additional headcount.

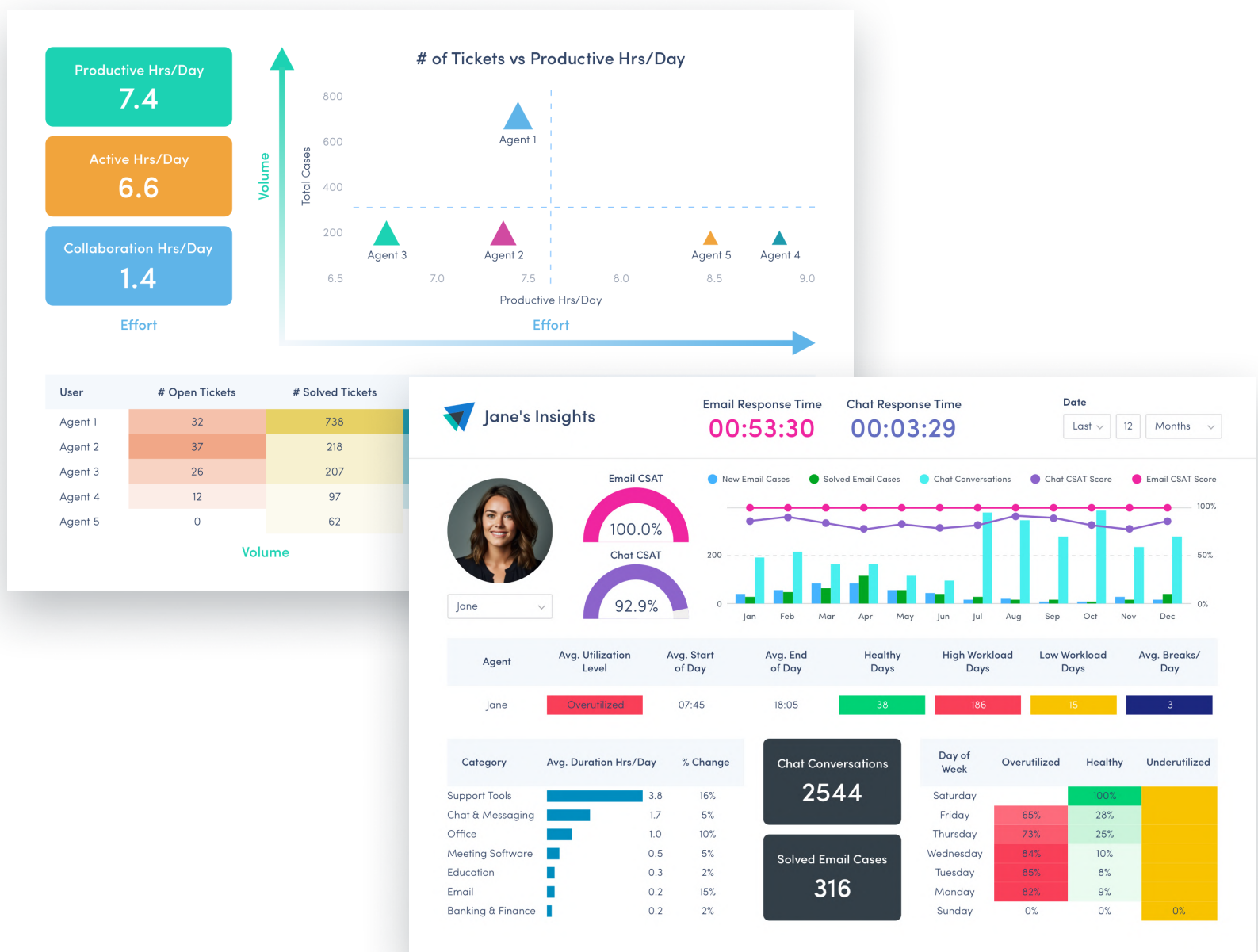
In order to balance increased productivity with employee well-being, the team needed to understand individual team member contributions and work habits at a glance. They also needed to be able to quickly identify coaching opportunities and recognize signs of burnout.

The team wanted a single platform that could marry customer service data with productivity data and provide actionable insights to determine the best ways to get better as a team and drive results. At the same time, they needed to make sure they didn't introduce the risk of attrition, burnout or poor support quality.

## Solution

The primary goal of the project was to boost productivity and efficiency, with a focus on productivity, operational efficiency and agent engagement, while maintaining the service and customer experience its support team already delivered.

Using ActivTrak's API, the company created a custom performance dashboard in Microsoft Power BI combining data from Zendesk, Intercom and ActivTrak to get a consolidated view of customer service and productivity data. By combining ticket volume data, response times/rates and customer satisfaction (CSAT) ratings with key productivity data such as hours worked, agent utilization levels and time spent on related support activities, the team had detailed insights into how work was getting done, where there was opportunity for improvement, and how to better drive results across the team.



This dashboard gave every member of the customer support team an easy way to view all of their productivity and performance metrics in a single place. It also gave managers a quick way to identify coaching opportunities, areas for process improvement and the ability to maintain and improve customer satisfaction while scaling capacity and balancing workloads.

The combined impact allowed the team to simplify operations by defining performance metrics based on objective data to keep customer satisfaction levels high and improve processes.

## Results

By combining workforce activity data from ActivTrak alongside Zendesk and Intercom data in Microsoft Power BI, the team created a single consolidated view of support team KPIs (hours worked, time in support-related applications, tickets opened and closed, CSAT and time to resolution). This provided a more complete view of inputs and outputs so managers could make decisions based on timely, accurate data which allowed them to accelerate performance reporting.

The new dashboard allowed the team to see agent response time, so managers could better understand which agents responded quickest to tickets as well as how much volume each agent managed. They were also able to see the number of productive hours each agent worked and the quality of their work based on CSAT scores. In order to give team members the ability to analyze and adjust their own work trends, the company shared individualized dashboards and reports with each agent on the team. This empowered employees to spot areas where they needed additional training and support.

By establishing a centralized approach to measure and share performance data, managers and employees had the data they needed to facilitate productive coaching sessions and 1:1 meetings. The dashboard allowed the team to identify the patterns of the most successful reps — tracking working hours and establishing productivity goals. This meant managers were able to coach team members on best practices for improving efficiency, focus and results.

Using complete, timely skills insight alongside workload metrics the manager was able to plan, forecast and schedule employees to match workload. With the enhanced visibility provided by the dashboard, the team was able to identify and respond to inefficient processes and rebalance workloads quickly.

## Benefits

### Customer satisfaction

- Improved CSAT scores by 5% within 6 months

### Enhanced visibility

- Better understanding of how long it takes for a ticket to land in the right hands and get resolved
- Easily view and analyze weekly ticket trends (by team and individual) including number of tickets created, opened or resolved throughout the timeframe correlated to time worked
- Visibility into which days carry higher case volumes and adjust workloads and workdays accordingly (e.g. no meetings on Mondays given caseload) to sustain team performance without burning out employees or reducing the quality of responses
- Side-by-side productivity metrics for each team member, including number of cases vs. hours worked

### Operational efficiency gains

- Increased agent productivity by 21%
- Improved team capacity without adding headcount or jeopardizing customer experience
- Avoided costs associated with hiring and onboarding new employees

### Maximized output and quality

- Ability to manage and make adjustments to workloads and processes to ensure efficiency while maintaining customer satisfaction
- Ability to increase the number of high-quality support interactions through slight modifications
- Overall repeat cases were reduced
- Improved customer case resolution volume and quality

## Effective remote team management

- Improved visibility into work habits, process gaps, technology usage and results
- Better ability to manage remote team members
- Boosted work experience for team members regardless of geographical location

## Continuous improvement

- Centralized measurement led to more effective coaching sessions and 1:1 meetings
- Ability to create and promote a culture of continuous improvement

## Better onboarding and coaching

- Immediate steps to improve communication and coaching
- Better onboarding processes led to better agent success
- Improved employee satisfaction, higher engagement and higher retention

*“ActivTrak provides the essential visibility that I need to ensure the success of my customer support team while also ensuring a quality of services expected by our customer base. It has truly transformed the way I manage performance and process across my hybrid team. I’ve got visibility into effort and results side by side.”*

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## About ActivTrak

ActivTrak is a workforce analytics platform used by a wide variety of organizations, including financial services companies, healthcare organizations and government agencies to gain visibility into employee work activity.

[Request a demo](#)

