



Remote Customer Service and WFH on Freshdesk Omnichannel

A quick reference guide for getting the most out of your Freshdesk while working remote





Remote Customer Support in a WFH World

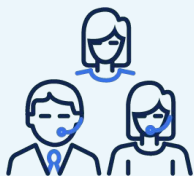
Delivering great customer service while working from home presents a challenge for customer support leaders all around the world. Due to COVID-19, many of us are not returning to the office yet trying to drive business as usual. Customer needs don't stop, however, and if anything there are new challenges such as collaborating effectively, sharing knowledge across the team, and maintaining productivity at a time when there is also a massive spike of customer issues.

We've put together six checklists to tune your Freshdesk for the new reality of WFH, and hope that we can all make the most of the new normal



For Admins

- ✓ Reduce cost-per-contact by adapting smart workflows
- ✓ Enable an always-on, **secure remote support** centre



For Supervisors

- ✓ Recoup decreased **support capacity & productivity** due to remote work
- ✓ Keep up your remote team's **efficiency**



For Agents

- ✓ Make your work **flexible** while keeping customer connections strong.
- ✓ **Rationalize resolving tickets** for an optimal work-life balance



Reduce cost-per-contact by adopting smart workflows

Prioritize and manage channels, resources and integrations to deliver standout agent and customer experiences.

Simplify multi channel support

- ✔ **Enable Omniroute™**

Automatically load-balance and assign phone calls, chat messages and email and social tickets to the right agents in your team.

 - Go to Admin → [Omniroute](#)
- ✔ **Deflect and engage with bots**

The Freddy no-code bot builder engages with customers and provides personalized support.

 - Go to Admin → [Bots](#)

Handle surge in customer queries with ease

- ✔ **Set up Parent-child ticketing**

Reduce overall resolution time for complex issues by breaking them down into child tickets which can be worked on by respective teams in parallel.

 - Go to Admin → Advanced Ticketing
 - Enable the toggle for [Parent-Child Ticketing](#)
- ✔ **Use linked tickets**

For times when you're getting a lot of tickets for the same issue, link them all together and broadcast updates to all in one click.

 - Go to Admin → Advanced Ticketing
 - Enable the toggle for [Linked Tickets](#)
- ✔ **Connect all your systems and data**

Install free apps from 650+ integrations available on our marketplace or build your own to eliminate the pain of constantly switching tabs for your agents.

 - Go to Admin → [Apps](#)



Enable an always-on, secure remote support centre

Implement these cyber-security measures while your agents log in through networks and devices of their choice

- ✔ **Enable SSO login**

Extend your single sign on to authenticate agents and users on your Freshdesk and let them use their existing secure credentials.

 - Go to Org Admin Console → [Security](#)

- ✔ **Edit your password policy**

Increase the password strength for all your agents or create a custom password policy.

 - Go to Org Admin Console → [Security](#)

- ✔ **Enable IP whitelisting**

Setup a VPN and switch on IP whitelisting for agents to allow only secure logins to the helpdesk as agents work outside the office firewalls.

 - Go to Admin → Security → [Toggle IP Whitelisting](#)

- ✔ **Set up two-factor authentication**

Keep your helpdesk secure by turning on two factor authentication (2FA) for your agents.

 - [Click Edit Profile inside the Freshworks Switcher and setup 2FA](#)

- ✔ **Custom SSL certificate**

Set up custom SSL certificates to secure your own support domain or vanity URL for a safe and personalized experience.

 - Go to Admin → Security → [Secure Connection using SSL](#)

- ✔ **PCI and HIPAA compliance**

Keep sensitive PHI and financial data secure and encrypted with our advanced compliance clusters.

 - Please contact your Account Manager



Recoup decreased support capacity & productivity due to remote work

Create dashboards, get actionable insights and be on top of your duty roster.

Get insightful data on agent performance behaviours

- ✔ **Create team dashboards**

Customize your dashboards to showcase the most important metrics, and enable teams to make data-driven decisions to meet their support targets.

 - Go to Dashboards
 - Click on the ☰ icon on the top left
- ✔ **Schedule custom reports**

Create bespoke reports using 200+ metrics and widgets to get a 360 view of your support function's performance.

 - Analytics → [New Report](#)

Monitor and track remote workforce

- ✔ **Set up agent shifts**

Define shift timings for agents working across time-zones.

 - Sign up for early access [here](#)
- ✔ **Introduce response SLAs**

Each response time is important in these times and setting up next response SLAs and Dynamic Queue Prioritization (DQP) enables faster turnarounds.

 - For DQP: Admin → Omniroute → [Preferences](#)
 - For SLA: Management: Admin → [SLA Policies](#)



Keep up your remote team's efficiency

Design internal processes to automate workflows and to motivate the team



Automations

Streamline your helpdesk and automate repetitive tasks like updating properties, ticket assignment, escalations and much more.

- Go to Admin → [Automations](#)
- Setup automation rules to be triggered during ticket creation, ticket updates, or time triggered



Automatic ticket assignment

Manual assignment is cumbersome and time-consuming. Decrease assignment time drastically with load or skill based routing rules.

- Pick the groups Admin → Groups → <Your Group>
- [Choose the routing strategy under Automatic Ticket Assignment or Omniroute](#)



Gamification

Keep up the remote team's motivation even without direct interactions using badges, leaderboards and quests.

- Go to Admin → [Arcade](#)
- Click on 'Enable Freshdesk arcade'



Make your work flexible while keeping customer connections strong.

Freshdesk's capabilities helps you adjust to your new setting and handle higher ticket volumes.



Freshdesk mobile app

Respond to tickets from anywhere. Get instant notifications for new tickets, responses and SLA reminders and improve your metrics.

- Download app for [Android](#)
- Download app for [iOS](#)



Agent availability toggle

Toggle automatic ticket assignment while starting & ending the day or while taking breaks.

- On the web, use the 'Ticket Assignment' toggle on the top right of the navigation bar
- On the mobile app, go to Settings -> [toggle 'availability'](#)



Out-of-office / Time-off

Schedule 'out of office' periods easily and keep everyone informed.

- Use the 'Ticket Assignment' button on the top right of the navigation bar
- Click on 'Schedule out of office'



Create custom ticket views

Create as many custom ticket views to quickly access or scan through tickets.

- Go to Tickets tab → Apply filters
- Click '[Save view as](#)' to save it



Rationalize resolving tickets for an optimal work-life balance

Request your supervisor/administrator to set up these cool features that improve your productivity.

- ✔ **Canned responses** Respond to tickets quickly using preset replies and insert them in replies with keyboard shortcuts.

 - Helpdesk Productivity > [Canned Responses](#)

- ✔ **Assist bot** Bots that enable you to provide quality and consistent support with next-best-actions and intelligent recommendations in every conversation

 - Admin > [Assist bot under the Freddy section](#)

- ✔ **Ticket templates** Stop entering the same information again and again with ticket templates.

 - Helpdesk Productivity > [Ticket Templates](#)

- ✔ **Solution articles** Send out accurate and quick responses by inserting content from your knowledge base or sharing the link with customers.

 - Click on the [Solutions icon](#)

- ✔ **Scenario automations** Perform repetitive tasks with a single click from within the ticket.

 - Click on a ticket from the dashboard > select [Execute Scenarios](#)

- ✔ **Contextual collaboration** Collaborate with your peers using Freshdesk's inbuilt tool or by integrating with Slack, MS Teams, Google Hangouts and others.

 - Click on the [icon on right bottom corner](#)

Turbo-charge your Support

Deliver exceptional agent and customer experience with Freshdesk — a platform purpose built to transform and elevate every customer interaction. Reach out to your Freshdesk account manager or write to us at support@freshdesk.com.

At Freshworks, we went from 13 offices to over 3,000 overnight. Read how we transitioned our entire customer service operations from [in-office to remote support](#) in such short notice.

About Freshworks

Freshworks provides innovative customer engagement software for businesses of all sizes, making it easy for teams to acquire, close, and keep their customers for life.

Freshworks SaaS products provide a 360-degree view of the customer, are ready to go, easy to use and offer quick return on investment.

Headquartered in San Mateo, Calif., Freshworks' 3,000+ team members work in offices throughout the world. For more information visit www.freshworks.com.

