

Zendesk Support: Shopify's one-stop shop for helping customers

In the fall of 2012, Shopify was poised for the kind of hold-onto-your-seat hypergrowth that most startups dream of.

At the time, the Canada-based software company had just been named by Fast Company as one of the ten most innovative retail companies and was onboarding new merchants onto their cloud-based e-commerce platform at a nice clip.

In fact, over the next four years, Shopify grew fast—from 20,000 merchants to more than 300,000. The company, in the meantime, rapidly scaled to keep up with its customer base and has been busy outsizing expectations ever since. Shopify has remained at the industry's forefront by offering timely integrations with payment providers like Apple Pay and with emerging messaging platforms like Facebook Messenger, and by partnering with Amazon. Yet during that first flood of new business, Shopify quickly realized its teams were struggling to onboard and support new merchants—in large part because the tools in place weren't equipped for the deluge of new requests.

"The tool we had was really slowing us down," admitted Chris Wilson, Director of Technical Support. "Reporting was tough for us, and the tool impeded our ability to interact with merchants."

At the time, Shopify's customer support team was using Assistly, which became Desk.com, and latency issues forced agents to open 5 to 6 tickets at a time to help mitigate slow load times. Thus began the hunt for a new solution. After hearing good things about Zendesk, the team decided to take a closer look.

"We fell in love with Zendesk from the get-go," Wilson said. "The product was great, but the support that came with it was tremendous as well. Everyone we interacted with was invested in our success."

Located outside of Silicon Valley, support leaders at Shopify were sometimes at a loss for knowing how other, like-minded companies handled periods of extreme growth, or how they might optimize their processes and tools.

"Zendesk was super helpful about giving us ideas, and then also connecting us with other companies that had gone through similar challenges," Wilson said.

"We definitely see Zendesk as more than a piece of software," added Roy Sunstrum, VP of Customer Support. "I've never seen, in my course of business, the amount of focus on relationships—and not just on relationships that have a selling tone, but really on customers as a community."

Expecting to spend a month rolling out Zendesk, support leaders flipped the 'on' switch and were pleasantly surprised. Within a single day, agents were up to speed. The team found Zendesk Support to be flexible and easy to use—and, importantly, fast. Load times were no longer an issue and support leadership was now equipped with near real-time data.

Over the longer term, this was one of—or perhaps the first of—many transformations at Shopify. Shortly after the team implemented Zendesk Support, leadership realized how frequently merchants asked sales and support questions during the same interaction. As a result, the inside sales team moved into more of a sales coaching role, helping to identify optimum opportunities for cross-selling and upselling, and support team was enabled to handle both sales and support inquiries. The end result benefitted everyone, as merchants no longer had to be transferred to another person or

moved to another channel of support, depending on their question. It also shed a new light on the role the support team could play for the business.

“There was a time at Shopify where I think the leaders of the company really saw support as required because of failure of product—that a perfect product would mean there was no need for support,” Sunstrum said. “And I think everybody’s gotten past that and said it’s really the human experience coupled with a wonderful product experience that’s going to drive our merchant count up, and what’s going to have them stay and spend more with us.”

Zendesk’s extensive apps marketplace and flexible API were also key in helping Shopify to scale its support. For example, Shopify uses the Twilio API to extend Zendesk Support into a custom-built call center, providing full visibility across voice and email tickets, which has enabled the team to focus on providing an ever-more effortless merchant experience.

Integrations with Salesforce and Gainsight also help Sunstrum’s team gain efficiencies by helping to prevent churn and surface more CRM data to agents as they upsell and cross-sell. Shopify also uses SurveyMonkey Create to collect Voice of the Customer data, as well as several other Zendesk-built apps including Time Tracking, Ticket Redaction, and Five Most Recent.

“We can really wrap Zendesk Support around our business instead of changing our business to wrap around Support,” Wilson said. “Support is the hub, the central tool we connect everything to. And as we grow and scale, there’s a push to continue to centralize and to ensure that when agents log into Support, everything is there.”

Back in 2013, Shopify had only 30-40 people working in Zendesk Support, but by mid-2016, over 600 support agents and Shopify employees were using the tool to support merchants, and as the central point of truth for customer information. In fact, Support is so flexible and easy to use that the tool has been adopted by other internal departments as well, including Shopify’s HR and IT teams.

“We’ve never run into a scenario where Support hasn’t been able to scale with us,” Wilson said. “Support is a reliable, dependable tool as far as speed and performance, and we can build on it and tailor it to be what we need.”

There are many ways that the team at Shopify can quantify their successes though, in Wilson and Sunstrum’s words, the company determines its success by the success of its merchants. Just a quick visit to the Shopify homepage provides a quick view into that—while you read the copy on the page, the dollar amount of product that merchants have sold using Shopify ticks up.

But there’s more to success than sales. The support team at Shopify is driven by customer satisfaction—and on avoiding what they call “the trap of efficiency.”

“We’re preoccupied with CSAT, which we call ‘smileys’, and we want to make sure we’re doing the right thing with customers and with agents,” Wilson said. “We want to make sure the merchants feel helped and supported, and that we aren’t chasing costs at the detriment of the merchant experience.”