

Less admin, more customer experience

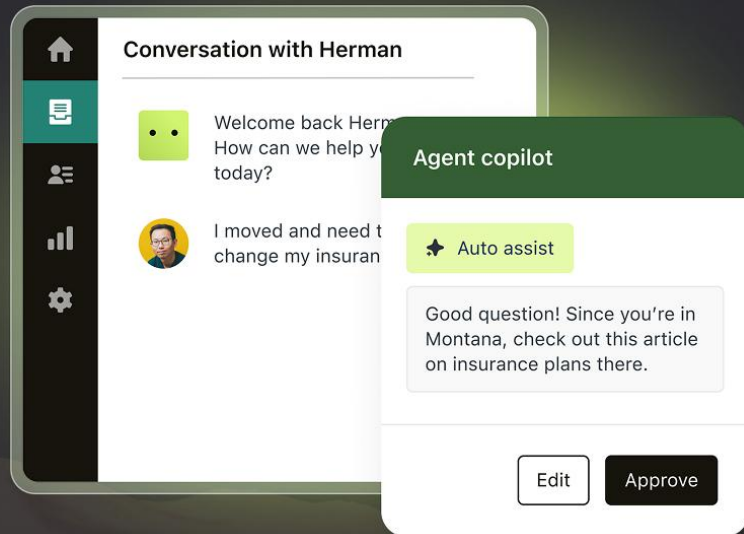
Spend less time on dull tasks, more time with your customers thanks to Zendesk and AI



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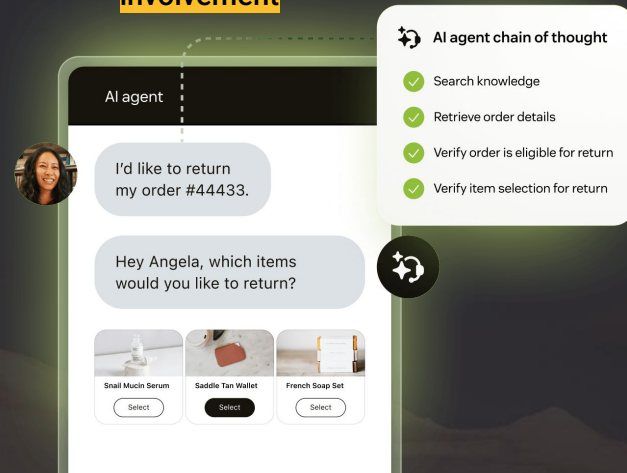
October 30 - 15:00 CET | 9:00 AM US EST

Every minute on routine tasks =
a minute not building customer relationships

These are some common challenges:

- 01 Teams drowning in repetitive admin work
- 02 Customers expecting personalized, immediate responses
- 03 Balancing scale with human touch

Zendesk's AI agent is projected to resolve
80% of support issues without human
involvement



Support systems are shifting from
human-operated software to AI-driven
automation as the primary workforce

What we'll cover today

01

Building your AI foundation

02

AI transformation

03

Success stories

04

Roadmap and resources to get started



Premier
Partner



Poll #1:

Which best describes your current Zendesk setup?

Building your AI foundation



Clear workflows

Processes, routing and dispatching



Clean data

Organized meta data



Knowledge base

Comprehensive self-service



Triggers & automations

Efficient ticket management



Team structure

Defined roles and groups



Consistent tagging

Standardized categories



Macros

Reusable responses



Quality standards

Response guidelines



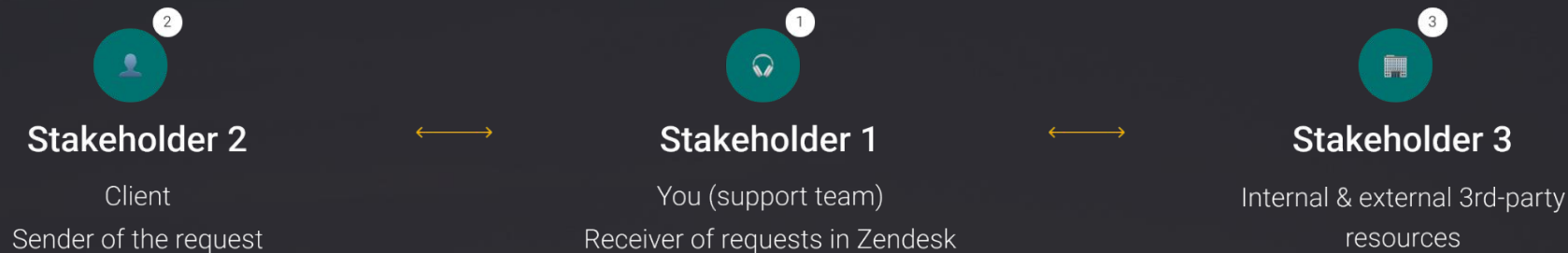
Performance metrics

Measurable KPIs

Poll #2:

What's your biggest customer service challenge right now?





 **Focus on what's actionable. Automate the rest.**

Tickets only appear in your workspace when **you** need to take the next action.
When waiting on stakeholders 2 or 3, tickets automatically move out of your view.



Stakeholder 1

1 Views (Employee overview)

Customized workspace showing only tickets requiring your action

2 Ticket statuses

Track where tickets are in the workflow and with which stakeholder

3 Service Level Agreements (SLAs)

Reply policies and KPIs to prioritize responses within agreed timeframes

4 Auto follow-ups

Automatic reminders and follow-ups with stakeholders 2 & 3

5 Automatic routing

Intelligent tickets assignment to the right team or agent

6 Side conversations

Communicate with external stakeholders without cluttering main ticket

7 Macros

Pre-built responses and automated actions for common scenarios

1



Views

Customized workspace showing only tickets requiring your action. Everything else stays hidden until needed.

2



Ticket status

Track where tickets are in the workflow and with which stakeholder at any given time.

3



SLA

Service Level Agreements - Reply policies and KPIs to prioritize responses within agreed timeframes.

Focus zone

Example of what agents can focus on

All Open Tickets

Handler 

 Play

 Filtrer

10 tickets

☐	Ticket-status	Id 	SLA 	Ticket Category 	Emne 	Anmoder 	Anmodet 	Opdateret 	Organisation 	Ansvarlig 
☐	Åben	456789	-26t	SLA Client	Re: Re: Re: Support needed changing password access for APIs	Anders Andersen	24. sep	I dag 08:17	Swedish Health	Lillian Schultz
☐	Åben	456790	4t		Anvil & Voyado	Anders Andersen	15. okt	15. okt	Whispering	Anders Andersen
☐	Åben	456791	4d	SLA Client	Coop årligt GDPR tilsyn	Anders Andersen	08. okt	14. okt	Coop Danmark AS	Anders Andersen
☐ 	Åben	456792	5d	Apps	Zendesk connection	Anders Andersen	13. okt	for 14 minutter siden		Lillian Schultz
☐	Åben	456793	7d	Projects	Zendesk Fluent App	Anders Andersen	02. okt	I går 15:19	Whispering	Anders Andersen
☐	Åben	456794	7d		Update on the Zendesk phone setup - GCC	John	10. okt	I går 09:36		Anders Andersen
☐	Åben	456795	10d		My actions and status	Anders Andersen	onsdag 16:37	I går 10:11		Anders Andersen
☐	Åben	456796			Follow-up on workflow meeting	Anders Andersen	23. sep	02. okt		Anders Andersen
☐	Åben	456797			Tidsregistrering	Lillian Schultz	30. sep	17. okt	Swedish Health	Anders Andersen
☐	Åben	456798			IVR-draft	John	16. okt	onsdag 16:01	Whispering	Bernard Tordella

4



Auto follow-ups

Automatic reminders and follow-ups with stakeholders 2 & 3.
Never let a ticket fall through the cracks while waiting on others.

5



Automatic routing

Intelligent tickets assignment to the right team or agent based on expertise, availability, and workload.

6



Side-conversations

3rd-party engagement tool that lets you communicate with external stakeholders without cluttering main ticket thread.

7



Macros

Pre-built responses and automated actions for common scenarios. One click to apply multiple ticket updates simultaneously.

Customer asks: Where is my package? Stakeholder 2



You contact the carrier (3rd-party) to check status Stakeholder 1



Carrier responds Stakeholder 3



You reply to customer Stakeholder 1



Ticket leaves again while waiting for customer response Stakeholder 2

Audit your foundation

Where are you on this journey?

- ✓ Views organized for team efficiency
- ✓ Ticket statuses used in the right way
- ✓ Auto follow-ups configured
- ✓ SLAs set and monitored

- ✓ Routing rules match team skills
- ✓ Side-conversation processes established
- ✓ Macro library current and well-organized
- ✓ Knowledge base up-to-date



Poll #3:

What concerns you most about implementing AI?

AI transformation

From admin to impact



1

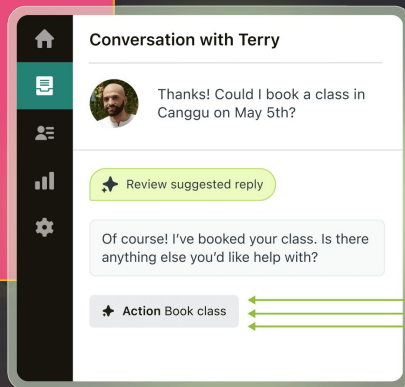


AI Agent - Copilot

Where
Inside agent workspace

What
Pre-build replies

Who
Supports your agents directly



2



AI Agent

Where
Customer-facing channels

What
Handles inquiries directly

Who
Assists customers before agent involvement



AI agent

I'd like to return
my order #44433.

Hey Angela, which items
would you like to return?



Small Mucin Serum

Select



Sakula Tan Walnut

Select



French Soap Set

Select

AI agent chain of thought

- ✓ Search knowledge
- ✓ Retrieve order details
- ✓ Verify order is eligible for return
- ✓ Verify item selection for return



API



What your team gains from AI



Time savings

- ✓ Faster response
- ✓ Quick access to relevant information
- ✓ Reduced search time



Quality improvements

- ✓ More consistent messaging
- ✓ Fewer errors
- ✓ Better knowledge base utilization



Agent experience

- ✓ Focus on important problems
- ✓ More satisfying work
- ✓ Reduced burnout

The result

Happier agents delivering better and consistent customer experiences

The smart way to launch AI



The problem with going all in

- ✗ Overwhelming for agents
- ✗ Difficult to troubleshoot
- ✗ Lower quality results
- ✗ Team resistance



The Hans method

- ✓ Start small: 3-5 use cases only
- ✓ Launch focused: Master these before expanding
- ✓ Learn together: Agent + AI development
- ✓ Scale smart: Add cases based on success

Start small

Select 3-5 high-volume, straightforward use cases

Timeline: Week 1-2 **Success:** Cases identified & documented

1

Launch focused

Deploy AI on selected case only - master before expanding

Timeline: Week 3-6 **Success:** 70%+ agent adoption

2

Learn together

Gather feedback, refine AI, train agents continuously

Timeline: Week 7-10 **Success:** Quality scores improving

3

Scale smart

Add 3-5 new cases based on proven success metrics

Timeline: Week 11+ **Success:** Ready for next wave

4

✓ Selection Criteria

✓ High Volume

Frequent enough to gather data

✓ Clear Patterns

Consistent resolution paths

✓ Low Risk

Minimal impact if AI makes mistakes

✓ Measurable

Easy to track success

⚠ Cases to Avoid Initially

● High-complexity edge cases

● Emotionally sensitive situations

● Legal/compliance-critical issues

● Low-volume specialty requests

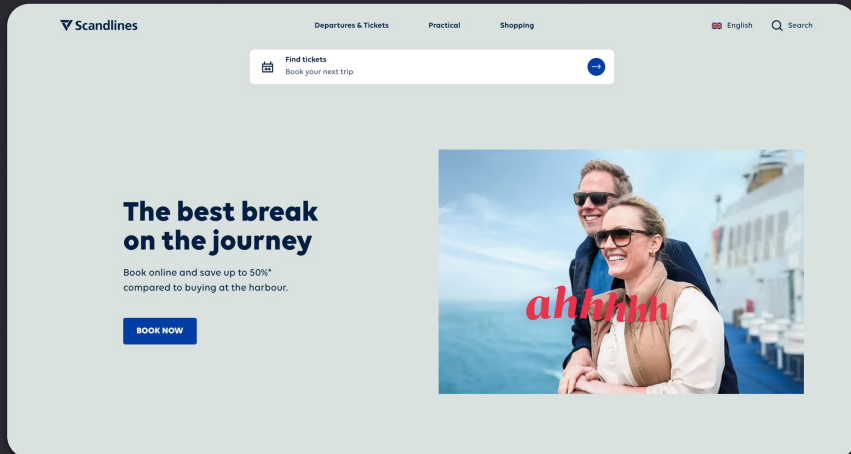


Success stories

Scandlines & TravelPerk

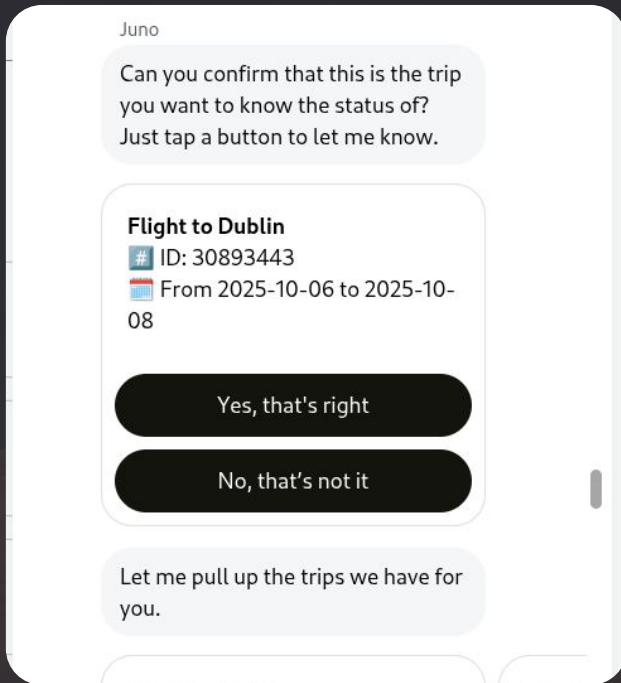
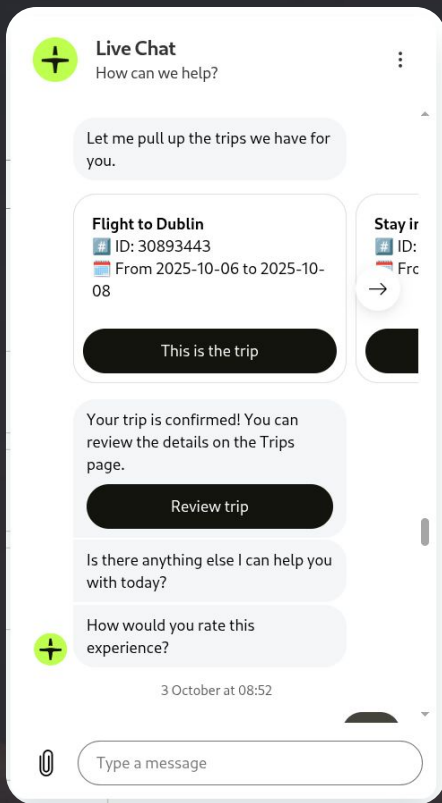


Scandlines: Connecting Northern Europe by sea



- Ferry company operating in Northern Europe
- High-volume customer service operation
- **The Challenge:** Ferry ticket re-booking requests

TravelPerk chatbot in action



Your action plan

Getting started with Zendesk & AI

1

Audit your foundation

Weeks 1-2

- Complete foundation checklist
- Identify gaps in current setup
- Prioritize improvements

2

Optimize core processes

Weeks 3-6

- Implement missing foundation elements
- Train team on best practices
- Document workflows

3

Launch your AI

Weeks 7-10

- Select 3-5 use cases
- Configure and train AI
- Launch with small team
- Gather feedback

4

Scale & optimize

Ongoing

- Expand use cases
- Continuous improvement

Remember these 5 things

1 Foundation first, then AI

Your AI is only as good as the process you teach it

2 Start small with AI

3-5 use cases, then scale based on success

3 Support your team, don't replace them

AI empowers agents to focus on what matters

4 Learn and develop together

Continuous improvement is the goal

5 Focus on customer experience

Not just efficiency - meaningful connections

Poll #4:

When are you planning to implement
AI in your customer service?



Q&A

What questions do you have about implementing
Zendesk and AI?

Ready to transform your customer service?

As a full-service Digital Experience Agency

Vaimo can help with:

- Zendesk implementation and optimization
- AI strategy and deployment
- Team training and change management
- Ongoing support and optimization



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