

Zendesk Messaging

Best Practices and Implementation Guide

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How to use this guide:

This document is intended to provide Zendesk customers with operational guidance and best practices to help implement and deploy messaging for their business. If you are interested in a high level overview of messaging, please start with our [enablement content](#).

This is also the first version of this guide and will continue to evolve with feedback from our technical teams, customers, and other stakeholders. Please feel free to comment or reach out on [#ask-messaging](#) if you have any questions or something is inaccurate.

****Note:** Please feel free to use the content in this guide to help customers set up and implement messaging. However, please do not share/link/download this guide for a customer. We will be using the information in this guide to create external content that can be directly shared with a customer (go [here](#) for more details on the timeline for external facing content).

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I. What is messaging?

Engage your customers with conversational experiences

The ability for consumers to have a conversation with a business over mobile or web isn't a new concept. This capability started with live chat; a real-time experience that allows businesses to have session-based conversations with their customers on their website or mobile app.

This experience has evolved in both capability (with persistence in conversations), and in the variety of channels that customers can now reach a business on (including new and emerging social channels), providing consumers with better conversational experiences.

The channels in which consumers can message a business have grown, and they can include web, mobile and new and emerging social messaging channels (such as WhatsApp, Facebook Messenger, and Apple Business Chat), giving customers an easier way to connect with their favorite brands on their preferred channels.

Additionally, messaging conversations are persistent (or ongoing), meaning that the consumer has the ability to message a business, leave the conversation and then pick up that conversation from where it left off at a later time, or over another device, offering flexibility, convenience and personalization.

In this guide, we'll highlight the core benefits of messaging, the differences between a session-based conversation (ie live chat) and a persistent conversation (ie messaging), and how businesses can prepare their operations when making the switch to messaging, with specific guidance on how to get started with Zendesk messaging.

Messaging is the people's choice

Messaging's popularity has grown faster than any other channel and it's rapidly transforming how customers interact with brands. Convenient, conversational, and personal, messaging promotes an ongoing dialogue between customer and company. With messaging, customers can easily get their issues resolved on a channel they use with family and friends, while going about their daily lives. In fact, 64% of consumers have tried a new way to get in touch with customer service in 2020, with messaging and bots leading the way. Social channels have also accelerated in usage with 31% of customers preferring to communicate with a business over social messaging apps like WhatsApp and Facebook Messenger.

Keeping up with consumer demands

In the past couple of years, tech giants like Apple, Google, and Facebook have opened up their consumer messaging apps to businesses, meaning that customers now have more opportunities to easily connect with their favorite brands. However, businesses will need to adapt their tools and processes to make sure they're not just ready to engage in these new spaces, but are providing unified, conversational experiences across all channels.

For companies, staying connected to customers means seeking out new ways to engage. Of the 40 percent of companies that added a new channel this year, 53% turned to messaging, including channels like WhatsApp, SMS/texting, and messaging embedded in a company's own website.

"In 2020 we saw a progression in customer journeys away from pure customer care towards higher ROI scenarios like lead gen, sales and marketing. In 2021 we expect to see that evolution continue, with businesses triggering conversational experiences from advertising and consumers completing purchase journeys inside of asynchronous messaging."

- Rob Lawson, Partnerships at Google

II. Session-based vs. persistent conversations

Session-based vs. persistent conversations -- what's the difference?

Before diving into the best practices of messaging and how to get started, it's important to understand and prepare for one of the fundamental differences between messaging and live chat; session-based vs persistent conversations.

- **Session-based conversations**

- A *session-based* conversation is one that happens in real-time, without the conversation history being saved. A customer initiates a chat with your agent, receives assistance, and ends the chat – it's a single, stand-alone conversation that is not preserved for future reference. We typically call this "live chat".
 - Live chat thus has similar characteristics to other session-based/real-time channels (like phone), in terms of queuing, start time, stop time/disconnects
 - With session-based conversations, the history of the conversation disappears and the record of the conversation is provided through an "Email Transcript" request typically.
 - Oftentimes, disconnects due to the conversation being session-based are problematic and lead to poor end user experiences.
- **Persistent conversations**
 - In contrast to a session-based conversation like live chat, a persistent conversation is one which can continue across multiple sessions, by either the agent or the customer. This type of interaction is typically known as a "messaging" conversation (however a messaging conversation can also be real-time or session based).
 - Information and context from earlier conversations is readily available to both agents and your end-users.

Understanding the elements of persistent-conversations is one of the most critical components of messaging because it impacts several aspects of setup and how to think about your operations, as outlined below.

III. Align messaging to business objectives

Deploying web, mobile and social messaging support for your business ultimately supports a more conversational experience by offering a convenient way for customers to reach you on their preferred channels, but also by giving businesses the tools they need to offer personalized, interactive customer experiences. Here are some of the key benefits messaging can provide to your business:

Offering convenience and flexibility to fit customer's preferences

Messaging, including social apps like WhatsApp and Instagram, has become the de facto standard for communications because of its flexibility and convenience. WhatsApp usage is up 132% for SMBs, 122% for Enterprise, and 88% for Mid-Market (Source: Zendesk Benchmark). The consumer is now in control of the conversation and can respond when available. Importantly, they no longer have to repeat themselves when getting customer service. In short, customers want to have the flexibility to not only reach businesses on their preferred channels, but be able to leave and re-enter a conversation without repeating themselves, which can help businesses improve

their overall CSAT rating.

Key KPIs to monitor: CSAT score

Resolve issues faster and reduce costs

If your business is getting bogged down by a high volume of customer queries, or an influx of repetitive requests, adding a bot to your website or mobile app can be beneficial. Bots are available 24/7, even when agents are offline or overloaded, and can save time for agents and customers by collecting information before escalating. External systems can be integrated to increase productivity for agents and allow customers to take immediate action (for example, completing a purchase with a payment processor or tracking an order delivery with a location service). And it's proving to help businesses be more efficient, as 47% of companies said they offer messaging as it provides faster time to resolution (Source: Zendesk Benchmark).

Key KPIs to monitor: Average Handle Time, First Response Time, Cost Per Ticket

Build stronger, more personalized relationships with customers

In order to offer a more engaging customer experience, it starts with the agent. If one of your objectives is to provide a more personalized customer experience, it's important that agents have the relevant context at their fingertips to know who the customer is and the details about their issue. By personalizing the conversation, this can create long-term trust and brand loyalty with customer context and history. 42% of companies said they offer messaging as it provides more personal interactions (Source: Zendesk Benchmark)

Key KPIs to monitor: Customer retention / NPS

Turn service into sales opportunities

Beyond support, messaging can be critical to growing your revenue. With messaging, you can unlock new revenue streams with tools for driving engagement across the entire customer journey. With 60% of Instagram users saying they find new products on Instagram, and 72% of e-commerce transactions predicting to be over mobile by 2021, messaging can be a platform to help not only transform your customer support, but also help drive sales opportunities and meet revenue targets.

Key KPIs to monitor: Revenue, Conversion Rates

IV. Which channels are right for you?

One of the first places to start when mapping out your messaging strategy is evaluating messaging channels, which can include web, mobile (Android or iOS) and social (ie WhatsApp, Facebook Messenger, Apple Business Chat, and more). With so many new and emerging channels for engaging your customers, it's critical to think about which channels to implement in order to meet your customers where they are.

TL;DR**A few things to keep in mind when thinking about your channel strategy:**

- Your digital presence -- consider which page(s) your customers are trying to reach you on, ie a help center page, or if you're in e-commerce, which pages drive the most conversion, and if you have a mobile app, how to provide support over your app.
- Your region (both where your business is located and where your customers are) -- some specific social channels, like WhatsApp, are popular among users in specific regions, such as Latin America, whereas Facebook Messenger is more popular amongst consumers in the U.S.
- Your industry -- if you're in retail, consider Instagram as it's a popular channel amongst consumers and influencers. But if you're in finance (or an industry that has strict privacy regulations), consider WhatsApp for its encryption capabilities.

To think about how to tie messaging into the customer journey, we recommend you consider some of the following:

Digital presence

Messaging has become a popular channel for websites and in mobile apps. But, how do you decide where to embed messaging on your website or mobile app? Here are a few things to consider:

- What page(s) on your website do you want to add messaging to?
 - Which pages get the most traffic? -- typically your homepage
 - Which pages convert the most sales? -- typically a pricing or product page
 - Which pages are most relevant for customer support? -- typically a support page or knowledge base
- If you have a mobile app, consider adding messaging to your mobile app as well via the iOS or Android SDK as customers prefer to receive service while they are in your app
- If you're offering support over [WhatsApp](#), consider adding your WhatsApp business phone number to support pages, as well as the WhatsApp button to your website or mobile app.
- Consider what type of business you are (B2B or B2C). Customers are more likely to reach out to B2C businesses on consumer-facing apps, like Twitter, Facebook, WhatsApp, Instagram, etc. B2B businesses tend to have customers reaching out over web or mobile, their help center, and email.

Region

The social channel(s) that you choose for business can greatly depend on where in the world your customers are, as there are channels that are very popular in some regions more than others.

North America:

- Recommendations: Add messaging to your website or mobile app, consider adding Facebook Messenger
 - Customers in North America prefer to message with companies via SMS/text or directly through their website, though tickets over Facebook Messenger and Twitter direct messages spiked 172% here during the pandemic.
 - Currently, half of companies that offer messaging support rely on Facebook Messenger, while 41% use web messaging, and a third use SMS/text or mobile messaging

Asia-Pacific:

- Recommendations: Add Facebook Messenger, consider adding WhatsApp, web / mobile messaging, or regional favorites like WeChat (China), Kakao (Korea), or LINE (Japan)
 - More customers in Asia-Pacific are filing tickets over Facebook Messenger than any other region. Though far fewer tickets are filed via WhatsApp, both channels saw a pandemic boost and customers say they prefer to use social messaging and text when they message with companies.
 - Currently, more than half of companies that offer messaging support rely on Facebook Messenger and SMS/text, while 47% use WhatsApp.

Europe, Middle East and Africa

- Recommendation: Add Facebook Messenger and WhatsApp, consider adding web/mobile messaging, or regional favorite Viber (Eastern Europe)
 - Most customers in this region are filing tickets using Facebook Messenger, though WhatsApp use jumped 190% last year. Customers here say that when they reach out to companies over messaging channels, they prefer to use social messaging apps, text, or messaging directly through a website or mobile app.

South America

- Recommendation: Add WhatsApp and Facebook Messenger, consider adding web/mobile messaging and Instagram Direct messages.
 - Customers in Latin America are filing more tickets over WhatsApp than all other regions combined, and the channel saw volume increase 96 percent over the last year.
 - When messaging with companies, customers prefer to use social messaging apps like WhatsApp and Facebook Messenger, but also don't mind directly messaging a company through its own website or mobile app.

- Currently, nearly all companies that offer messaging use WhatsApp (91%), but 74% also turn to Facebook Messenger.

Industry

Industry can also be a determining factor of which messaging channels you should consider enabling for your business.

If you're in retail or e-commerce, you might consider Instagram, as it's becoming one of the most popular messaging platforms for retail use cases.

However, if you're in finance or banking, you could consider a channel like WhatsApp for its privacy features via encrypted messaging to keep private information like bank account details safe as it's session-based and the conversation history is not saved.

V. Introducing messaging at Zendesk

Benefits of Zendesk messaging

As an evolution of our live chat product, we launched Zendesk messaging, which delivers rich, conversational experiences for businesses that are connected across web, mobile and social channels. It's easy to automate right out of the box, and can be completely customized with our open and flexible platform.

- **Provide support wherever your customers are**
 - Connected across web, mobile and social apps so the conversation is ongoing and the customer never has to repeat themselves
- **Increase team productivity and efficiency**
 - Messaging comes with a unified agent workspace right out of the box that gives agents the context they need to respond to customers across any channel
- **Offer faster & more personalized interactions**
 - Provide 24/7 support for customers with built-in automation for faster service as you scale (no code required) and rich content for more interactive conversations, with Answer Bot Flow Builder
- **Customize to meet the needs of your business**
 - Create unique experiences for your customers, tailored to the needs of your business, with an open and flexible platform that lets you integrate with third party systems, like using specialized bots or connecting to external tools

VI. What's the difference between live chat and messaging?

Live chat and messaging are two types of conversational service experiences. As described above a live chat experience is typically real-time or session-based, whereas a messaging conversation can be both session-based or persistent (although it is typically the latter).

However, the concepts can sometimes overlap and frankly the differences between terminology are not that important. For most businesses, their main goal is to add conversational support to their website or mobile app. To do this a business can choose between the following options from Zendesk:

- New options for messaging: [Web SDK](#) (for web) or Android/iOS SDKs (for Mobile)
- Current options for live chat: [Web Widget](#) (for Web) or Chat SDK (for Mobile)

While they offer some similar functionality, each come with distinct capabilities which impact the end user and agent experiences.

TL;DR

Web SDK / iOS or Android SDK (messaging) ← most customers should use this

- Real-time "live chat" or ongoing (persistent, asynchronous)
- Advanced automation with Answer Bot Flow Builder
- Support for rich content (ie images, carousels, action buttons)
- Open and flexible platform (Sunshine Conversations)
- Advanced features coming soon
- Requires the new Agent Workspace

Web Widget/ Chat SDK (live chat) ← only use this if a customer needs advanced features not yet available in the Web SDK

- Only real-time "live chat" (session-based)
- Basic automation with Answer Bot article suggestions
- No rich content
- No messaging platform
- Available Advanced features (e.g. skills based routing, third-party integrations, user authentication, and more)

[Click here for a detailed comparison](#)

With the new messaging capabilities in the Web SDK/ Android or iOS SDK you can do most everything that the Web Widget / Chat SDK could do, plus more. Unlike the Web Widget / Chat SDK, with our new Web SDK and Android / iOS SDKs, businesses can provide session-based "live chat" conversations *and* persistent conversations with conversation history.

Persistent vs. session-based conversations

One of the main distinctions between live chat and messaging is session-based vs persistent conversations, as described above. With the Web Widget / Chat SDK, conversations are session-based, whereas conversations over the Web SDK / Android or iOS SDK can be session-based or persistent. Therefore, the Web Widget / Chat SDK enables conversations that are always happening in real-time, whereas with the Web SDK / Android or iOS SDK, conversations could span over longer time periods, as the user has the flexibility to leave the conversation and pick it up later at their convenience.*

*To support cross-device persistency, end user authentication is on the roadmap, which allows users to authenticate with your service directly from the messaging experience on web or mobile. This feature will be released in Q3 2021.

Rich content

The Web SDK supports rich content, including images, action buttons and more, providing an interactive, engaging customer experience. However, the Web Widget doesn't support rich content.

Automation

With the Web SDK / Android or iOS SDK, customers benefit from automation capabilities via Answer Bot. As part of Answer Bot, Flow Builder provides admins with a way to build conversational flows that cover the most common questions, and let users navigate using quick replies, with links to help center articles to provide more information. Unlike the Web SDK / Android or iOS SDK, the Web Widget / Chat SDK only includes basic Answer Bot article suggestions.

Extensibility

If you want to have the ability to extend and customize your messaging support, you can use Sunshine Conversations to integrate third party systems and bots, add proactive support, customize the look and feel of messaging on your website or mobile app, and more via the Web SDK and iOS and Android SDKs. The Web Widget / Chat SDK don't offer the same extensibility features.

Advanced features

If your support organization requires enterprise features, such as skills-based routing, third party integrations, user authentication, multi-agent chat, and proactive triggers, the Web Widget / Chat SDK is more suitable for your business. These are all currently not available for the Web SDK / Android or iOS SDK, but are [coming soon](#).

So which should you deploy for your website or mobile app? It can depend on your use case, business objectives and capability needs. Additionally, if you're currently using the Web Widget and Chat SDK, and are evaluating the switch to Web SDK (and iOS and/or Android SDKs), be sure to review this [help center article](#), which covers the main differences between the two, feature gaps and limitations.

VI. Getting started with Zendesk messaging

Once you've enabled messaging for your website, social channels or mobile app, it's important to consider the end-user, agent and admin experiences for these new channels. We'll cover best practices for each of these audiences further below, but here are some quick tips to help get you started.

End-user experience (web, social and mobile messaging)

Here's a set-up checklist to follow to get you started for the end-user side of messaging on your website.

- ✓ **You can [activate messaging](#) for your website or Help Center by creating a Web SDK. Messaging will need to be activated for each brand that will use a Web SDK.**
- ✓ **You may be currently using the Web Widget and considering switching to the new Web SDK.**
 - When you enable messaging in the Web SDK for a brand with an existing Web Widget, you're essentially switching off the Web Widget and migrating to the new messaging Web SDK.
 - Many of your classic widget configuration settings are automatically migrated to the new Web SDK settings, including widget position, theme color, button text, snippet and help center enablement.
 - However, there is some web widget functionality that isn't currently available for the new Web SDK:
 - Talk is not enabled in the Web SDK
 - Existing Javascript API code may not be supported
- ✓ **Consider where to put the web widget (ie on which pages of your website, think about traffic, conversion)**
- ✓ **Think about how to customize your web widget for your brand**
 - Branding / colors for your web widget
 - Basics (channel name and flow)
 - Style (Web SDK appearance)
 - Preferences (Conversation history settings)
 - Installation (Code snippet and Help Center embed)
- ✓ **Add a CSAT survey to the messaging workflow**
 - A CSAT survey request is triggered when a ticket created through a customer conversation is marked as Solved. The text included in the survey is localized into

one of the available Zendesk languages based on the customer's location data.

- ✓ **Conversation history:**
 - As mentioned above, if you choose to enable the conversation history feature (enabled by default) for your customers, when an end user returns to the Web SDK or social messaging channel where conversations with your business have already taken place, the full text of those conversations remains visible to them.
 - If you want to set up a “session-based” conversation in the Web SDK, you'll need to go into your admin center and under the preferences tab for your messaging channel, select “Forget History.” You'll also need to set up a trigger to automatically close the ticket.
- ✓ **Keep it conversational:**
 - Most customers are used to sending messages filled with emojis and exclamation points. If your messaging style doesn't match that of your customers, they likely won't be interested in communicating with your brand.
 - Keep customers engaged with a casual, approachable tone:
 - Write how you speak. Practice reading sentences out loud to see whether they sound like natural conversation.
 - Use contractions like “can't” instead of “cannot.”
 - Add color to your messages, and set the right tone with emojis. Smiley faces are generally safe, but stick to only one per message so they don't become overwhelming.
 - Keep the tone of your messages in mind. Use exclamation points and incomplete sentences to keep messages upbeat and cheerful.
 - Apply these tips to your templates, and make sure your agents are familiar with them as well.

Learn more about the end user experience for messaging [here](#)

Agent experience

Understanding the agent side of messaging will be crucial in ensuring your team is staffed and ready to manage conversations happening across multiple channels. With the Zendesk Agent Workspace, agents can manage all of their conversations, across channels, in one unified place, and access the relevant customer context to provide real-time, personalized support.

- ✓ **Get familiar with the Zendesk Agent Workspace* as your agent experience for responding to customers via messaging**
 - *Zendesk messaging requires Agent Workspace, the newest agent experience for unifying and managing all of your channels in one place.
 - Learn more about the [Zendesk Agent Workspace](#), including capabilities and current [limitations](#) to ensure you're a fit.
- ✓ **Have persistent conversations with customers by saving conversation history**

- As explained above, messaging conversations can be both session-based or ongoing (persistent). So what determines if a session has ended or is still ongoing?
 - By going into preferences for your web SDK and clicking “Remember History,” (enabled by default) in the Preferences tab, this setting will result in saving all previous conversations with customers.
 - Additionally, the ticket lifecycle can be managed by the agent by setting the status. To do this, the agent would need to set the status of the conversation as “closed” to actually end the conversation. If the customer reaches back out after that conversation has been set to closed, a new ticket is created (and assigned to a different agent).
- ✓ **Consider your conversation style**
- Consider making modifications to the agents introduction and communication throughout the conversation to set expectations.
 - Highlight messaging for end user convenience and differentiated CX
 - “Message Us” vs “Live Chat”
 - “Hi, I am Kyle and I will be your messaging agent today.”
 - “With messaging you can just take your time.”
 - “Feel free to reply at your own pace”
 - “You are x in queue ” vs “We typically respond back in 5 minutes”
 - Longer conversation scenarios introduce questions on reassignment
 - “My shift is ending soon but I will be back at the start of the morning. If you need immediate help, I could transfer you to another agent that can further assist. What would work best for you?”
 - Communicate continuity during agent change during long running conversations
 - “Hi, I am Jill and I will be assisting you from here out. I just caught up with the previous conversation and I see you still need help with....”
- ✓ **Accept messages and respond in real-time**
- When a customer sends in a message, these messages become tickets in the workspace.
 - Agents will receive a notification when these messages come in, and can respond in real-time.
- ✓ **Have all of the context at your fingertips**
- Agents are also able to see the full conversation history, including if any interactions happened with a bot, so agents have the ability to gather the full context on the customers issue before it was handed over to them
 - Agents can also see further information about the customer, including their contact information and previous interactions the customer has had with the business

- ✓ **Follow-up across different channels from one place**
 - Agents can follow up with a customer over messaging, or can send an email or place a phone call to the customer, all from one place
- ✓ **Manage ticket updates and notifications**
 - Agents receive updates about messaging tickets / new messages from customers via the notifications list, as documented [here](#)
 - Discuss with the customer how'd they'd like to assign agents to work on messaging tickets - potentially create separate views for Messaging tickets / create views per channel.
 - Reply driven SLAs don't work with messaging right now.
 - Avoid sorting tickets by SLA if only using NRT, FRT, etc.
 - Try to push for implementing a resolution-based metric (Requester wait time or Agent work time), if possible.
 - If the customer wants to drive a quick first reply for messaging tickets, create a “New Messages” view:
 - Channel is Messaging
 - Status is New
 - Sort by requested date or ticket ID
 - The following columns **do not** change in Views when a customer sends a message - don't try to use these to prioritize messages within a view:
 - Updated
 - Requester Updated (will display the ticket creation time)
 - Updater
 - The following columns do change in Views **when an agent** updates the ticket (clicks the “submit” button) *and* also sends a message:
 - Updated
 - Updater

Learn more about how to setup your Agent Workspace for messaging [here](#)

Admin experience

While we'll cover additional admin capabilities and best practices related to workflow, reporting, routing and more below, one of the key capabilities that admins have the ability to configure is Answer Bot for automation.

An important part of messaging is being able to automate the conversation to scale support via self service, and this is made possible via Flow Builder. Flow Builder is a click-to-configure tool that allows admins to build custom conversational experiences between customers and agents, and delivered across multiple channels and without writing a single line of code.

The addition of Flow Builder allows you to configure how Answer Bot greets your customers, offer quick-reply options and pre-written answers to common questions, provide targeted article recommendations, and more. Flow Builder includes a default conversational flow, which is published and visible in the Flow Builder page. The default flow begins functioning immediately through the Web SDK when it's enabled. For more advanced automation, we recommend selecting a bot from our third-party bot marketplace (more below)

Here are the steps to get started with Answer Bot for Zendesk messaging, using a simple welcome flow as an example:

- ✓ **Write a message:** Flow Builder comes pre-configured with a greetings message as a default. But you can customize this message to be more on brand with your business.
 - For a food delivery service called Eatery, you can customize the message to say: “Hi there! Thanks for reaching out to Eatery support. How can we assist you today?”
 - Based on the end users’ response, you can configure a series of other questions
- ✓ **Add resolution path for your commonly asked questions,** where Answer Bot displays up to six preconfigured quick replies that the end user can interact with during a conversation.
 - For example, if the question is “What brings you to our page today?” , the quick reply buttons could be “service request,” “sales question,” “login issues,” “talk to a human”
- ✓ **Suggest articles,** where Answer Bot presents up to six Help Center articles to the end user during a conversation.
 - This would then trigger the more relevant help center articles that are related to the end user's response
- ✓ **Feedback flows:** Answer Bot automatically prompts for feedback after an answer is provided so the customer can indicate whether they self-solved their question
- ✓ **Fallback flows:** When Answer Bot can't find an answer, it offers alternative options for the customer to continue the conversation (start over or transfer to an agent)
- ✓ **Transfer to agent,** which escalates the conversation to an agent. Answer Bot can also capture information from the end user through ticket fields. Note that Answer Bot collects the name and email of the end user by default.
 - You can select “Talk to a human” as part of your flow setup, which would transfer the conversation to an agent
 - Admins can also configure the setup to collect additional information via Flow Builder
- ✓ **Translations and language settings**
 - Visit settings page to select the language you want flow to be in
 - Choose whether you want your flows to be automatically translated to the 18 supported languages

Learn more about how to get started with Flow Builder [here](#).

Setting up social channels in the Agent Workspace

Admins can set up social channels, including WhatsApp, Facebook Messenger, Twitter DM, Line and more in the Admin Center so agents can accept messages from these channels in the Agent Workspace.

Learn more about how to setup these channels in documentation here:

- [Adding Facebook Messenger to the Agent Workspace](#)
- [Adding Twitter DM to the Agent Workspace](#)
- [Adding WhatsApp to the Agent Workspace](#)
- [Adding LINE to the Agent Workspace](#)
- [Adding Sunshine Conversations channels to the Agent Workspace](#)

VII. Operational best practices

Staffing models that work best for messaging

If you're familiar with live chat and how to staff your team, staffing for messaging will look a little different. As mentioned above, messaging can be asynchronous, which means that because there's no start and end to a conversation, like live chat, staffing for messaging will require you to plan differently than for a synchronous channel like live chat.

Staffing models: Blended? Messaging-only? Determine which works best for your business

- Blended model: You could assign agents to work on several channels at once, including messaging, email and phone
- Messaging-specific model: If you have higher volumes during certain times of day, you could consider a messaging-specific model to have agents dedicated to messaging channels

Planning for volume

If you make the switch from a session-based channel like live chat to messaging, you might notice some differences in terms of messaging volume

- How do they compare?
 - **Live Chat (session-based)**
 - i. Chat volume typically limited to hours of online availability (e.g., 9-5pm)
 - ii. Zendesk Benchmark: Most Chat volume peaks are between 10am -3pm *
 - **Messaging (persistent)**
 - i. Messaging volume can **start earlier** and **end later** in the day

- ii. Users have freedom to message at their convenience and outside of business hours
 - Because messaging volume doesn't tend to see the peaks and valleys that live chat does, it's important to strategize your staffing model based on the volume you're seeing, and reset customer expectations, such as with office hours

Setting expectations with business hours

It's also a good idea to set expectations with your customers on when agents will be available, and the best way to do that for Zendesk messaging is setting up a [trigger in Chat settings](#).

- **Name:** All Agents Offline
- **Description:** When all agents are offline, send an automated reply to warn the end user to expect a delayed response.
- **Message:** Hi there! Thanks for reaching out to us. We're offline right now, but we'll respond to your message when we're back online in a few hours.

What if an end user sends a message after business hours when agents are offline?

Unassigned messaging tickets can be displayed in a view setup for messaging. Agents will need to triage the view for handling. Prior to this, the brand should set up an autoresponder and set response time context for the end user.

- a. Messaging settings allow preconfigured text to communicate business hours in the window header via auto response.
- b. Chat Trigger conditions can be leveraged within the messaging channel to evaluate Account and Department availability and adjust user context accordingly.
 - e.g., "We are online now and will message back you in 10 minutes"
 - e.g., "We are offline now and will reply during normal business hours"

Consider automation to provide always-on service

Live chat allows you to structure your team in shifts and to only provide support when agents are available.

With messaging, the customer expectation is always-on service. Therefore, it's important to think about how you can utilize bots (ie Flow Builder) to offer support when agents aren't available (more on automation in the coming sections).

Be prepared for the WhatsApp business service window

The WhatsApp Business API gives you only [24 hours to respond to a customer's message](#) since customers expect a pretty quick turnaround with messaging. If you miss the service window, the customer has to opt back in to continue chatting.

This creates more work for the customer, so they're less likely to continue chatting. Keep customers engaged by always trying to respond within the business service window. Make sure you have enough live support agents to reply to customers. And when live support isn't available, you can set up [chatbots](#) to keep the conversation moving.

Unassign agent from ticket in open / pending status:

Depending on how agents are scheduled and how a customer sets expectations regarding reply times via messaging, consider unassigning agents from unsolved messaging tickets after a certain time frame

- Note: cannot currently re-assign messages based on agent presence / online status. See [\[internal only\] Omnichannel routing](#).
- **Out of Office app** may be a good solution for agents out on PTO, but most teams do not like the overhead of having agents set themselves as unavailable when they're just going off shift for the day.

Workflow considerations

Drive data collection for routing

One of the key differences between routing via live chat and messaging is that messaging routing is based on form fields collected via Flow Builder. Because of this, there are several improvements to routing for messaging vs. live chat, due to:

- Pre Chat survey data collection survey (Name/Email/Dept)
- Data collected via Flow Builder automatically mapped to ticket fields.

Here are some examples of routing capabilities to consider for messaging:

- Broadcast or Assigned routing
 - Broadcast routing is when all agents get notified of all relevant conversations, and the agent has to click on Serve Request to start serving the message.
 - Assigned routing is when messages are evenly assigned amongst online agents, such that only one agent is notified of each incoming chat at any given time.
- Queue
 - Messaging conversations created when agents are online are routed via the Accept button. The queue will be ordered based on time of ticket creation.
 - Messaging conversations created when agents are offline are sent to the Unassigned tickets view or the agent's Group view. Offline messaging conversations can be assigned to agents as part of triaging, or they can be manually picked up by agents themselves. Agents will receive a notification when messaging conversations are assigned to them.
- Enhanced data collection
 - Messaging allows multiple data points to be collected during Flow Builder, which

is beneficial when the conversation is transferred to an agent.

Learn more about routing capabilities for messaging [here](#).

What to expect when it comes to messaging concurrency

With live chat, concurrency is tied to the entire duration of the chat session, and it's recommended that there are between 2-3 concurrent chats based on the issue type.

However, messaging concurrency is not the same as chat concurrency. Messaging concurrency is tied to active conversation definition (active is defined as a user sent message within the last 10 minutes, as with live chat).

- Once 10 minutes have passed since the last user message, the conversation is not considered active and agent capacity is released.
- Agent capacity can also be released if the ticket status changes to Pending, on Hold or Solved, and will remain with the same agent until that happens.
- If the messaging agent has reached their messaging concurrency limit (eg, concurrency set to 3, 3 active conversations happening now), they will not be routed to another new messaging request.
- With this concurrency model, agents will not be locked into handling only max concurrent conversations limit (Eg, 2-3 conversations) over longer periods like chat concurrency model, which is tied to session.

How to handle agents going offline

Because of the persistent nature of messaging, something that may come up and you should plan for is when your agents go offline when handling a messaging conversation, and the conversation needs to be handed over to another agent.

This could happen if the customer suddenly becomes idle until the end of the active agent's shift, and after the agent signs out, the customer later replies.

- One solution is that the agent who is going offline / shift is ending, the agent could transfer unresolved conversation back to the group and there could be a view created to display messaging tickets without the assignee.
- Another workflow is to create a view for messaging tickets, and have a triaging agent assign these tickets to agents or have agents monitor this view.
- The admin could also build logic to recognize idle conversations (tags or ticket state) and re-engage, and close out if they remain unresponsive.

This is where one of the benefits of messaging, being able to view the entire conversation history, comes into play. If the conversation is transferred to a new agent, they can simply

introduce themselves and take over from there. The emphasis here is the end user not having to repeat themselves again.

Offline scenarios

End-user is no longer responsive

A common scenario that could occur with messaging is an end-user stops responding to an agent mid-conversation. Unlike live chat, where the conversation is session-based and thus the conversation would get disconnected if the end-user went offline, there wouldn't be a disconnect when it comes to messaging, as the conversation could be persistent. So there are a few options:

- The agent could reach out to the end user to ask if additional help is needed.
- Leverage automation to unassign or close tickets, but keep in mind that a solved ticket could trigger CSAT display to the end user. In this case, the CSAT trigger should be updated to exclude any auto-solved tickets.

*Re-engagement via email is on the roadmap, and it will allow you to automatically send an email notification to customers who abandon a conversation conducted through the web messaging channel, encouraging them to re-engage with your agents through their preferred channel.

Agent went offline

Let's say an end user and agent is connected initially during a messaging conversation. Later on, the end user sends a message and the agent is offline. What happens?

- If an agent is assigned to a ticket and offline in that scenario, the agent will see the end user message in the Notification List when they log back into Zendesk.
- *The ability to route urgent issues to another agent is not available today, but on the roadmap*

End-user responds after the ticket is solved or closed

A messaging conversation will stay with the original agent if the end-user responds after the ticket was closed or solved, depending on the status.

- If Solved, the conversation will go back to the Agent in Open state.
- If Closed, the end user will return the Answer Bot flow and a new ticket would be created during the Transfer to Agent step.

Managing conversations in views

Managing messaging tickets, just as with tickets from other channels, are all managed in views.

How does it work?

1. Messaging conversations created when agents are online are routed via the Accept button, and the queue will be ordered based on time of ticket creation.
2. Messaging ticket conversations created when agents are offline are sent to the Unassigned tickets view or the agent's Group view.

3. Offline messaging conversations can be assigned to agents as part of triaging, or they can be manually picked up by agents themselves.
4. Agents will receive a notification when messaging conversations are assigned to them.

Understand chat limits

With messaging, an agent's workload is measured as the number of active messaging conversations assigned to the agent. The maximum number of active messaging conversations that can be assigned to the agent is defined by Chat Limits.

A messaging conversation is considered active if it has received a response in the past 10 minutes. You can adjust the Chat Limit of your agents based on activity of the messaging conversations and volume of messaging conversations.

Assigning Groups to messaging conversations

With Flow Builder, you can create personalized flows to collect information from the end-user. It can be about their issue, region etc. This information will be captured in custom ticket fields.

With the new messaging experience, admins can use this information and setup routing rules in Support Triggers.

Learn more about setting up workflow configurations for messaging [here](#).

Business rules

- Flow Builder “resets” when the **ticket** is set to the Closed status. There will be a 1 to many relationship between the persistent conversation and ticket(s).
 - There is no ticket delimiter on the end user's side - they won't be able to tell which messages were part of each ticket.
 - **IMPORTANT:** Check if your customer has on-hold ticket workflows. Currently, customers can only have one “messaging” ticket open at a time, so it is not ideal to leave the original ticket created via messaging in the on-hold status for a prolonged period of time.
- “Channel is messaging” condition refers to how the ticket was created. None of the native business rule conditions account for channel switches (e.g., cannot identify when the last active channel was email unless you create some type of custom ticket field)
 - Might be able to create a custom ticket field and use a trigger to update it - “update via” condition? Not tested.

Provide faster response times with automation

How automation fits in with your CX strategy

Automation is beneficial for both the end users and agents. By automating support, customers are able to quickly resolve answers with self-service, while helping agents deflect common requests so they have more time to focus on more complex issues. And with enhanced data capture, this helps agents collect additional context about the customer's issue if it's transferred to them, giving them all of the information at their fingertips to quickly resolve a customer's issue.

Automation first starts by asking, "What are my brand's critical conversations?" and then going about creating automation flows that help resolve these conversations and make it easier on your agents. You can keep things simple, like providing a customized greeting, or include multiple branches based on customer responses. You can take advantage of autoresponders or chatbots to take care of repetitive tasks and queries, and link to your relevant help center articles to help customers self-serve.

How do you know when your business is ready for automation?

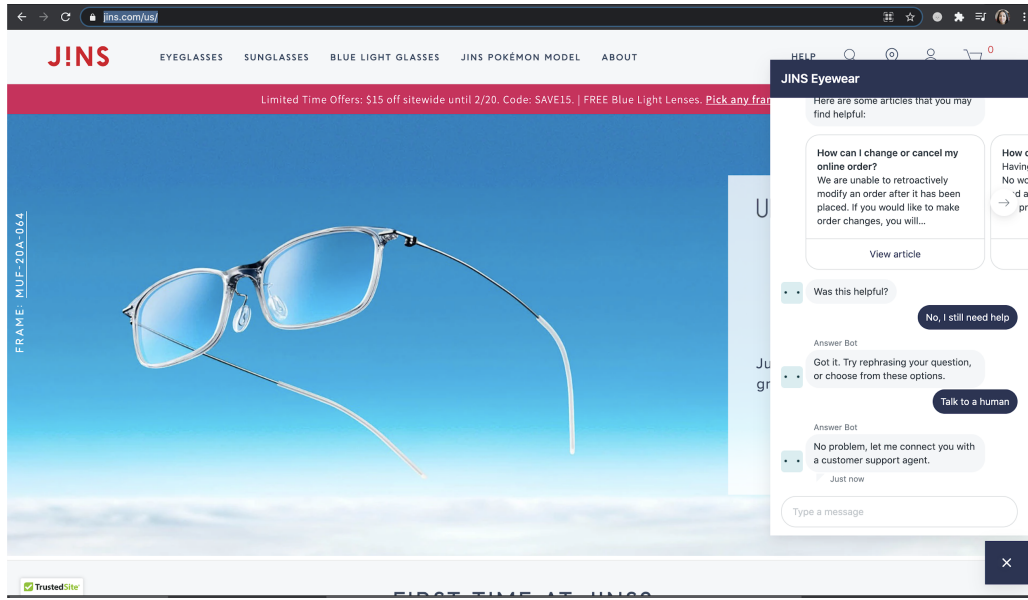
There are some key characteristics that would suggest that your business is ready for automation, such as:

- There's a high volume of customer queries on my website or mobile app
- Agents are getting an influx of repetitive questions via my website or mobile app
- Want to have a real-time channel to deflect existing volume
- Need to reduce the number of touches between a customer and agent to speed up efficiency

Capabilities

Consider some of the most frequently asked questions from your customers, and how to create automated responses or leverage bots around these to help customer self-serve.

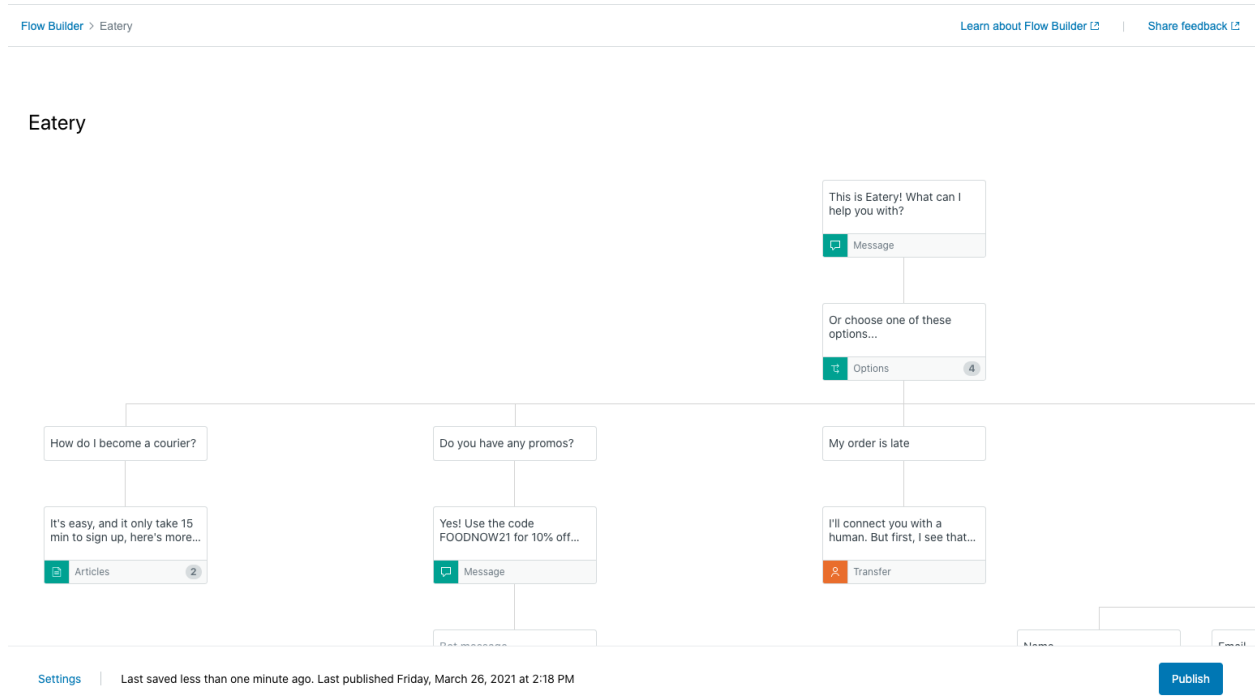
- Here are some of the top capabilities for bots:
 - Writing a greetings message
 - Configure availability and offline behavior
 - Allowing end-users to indicate whether they were satisfied with the experience
 - Capture customer information for agent context and reduce the number of touches
 - Basic assigned routing



Customer example using Answer Bot: JINS Eyewear

Example of a flow

Once you've mapped out some of the most common questions and issue types that come up for your business, you can think about how you want to structure conversation flows in Answer Bot. Here's an example of a flow setup by an on demand food delivery service.



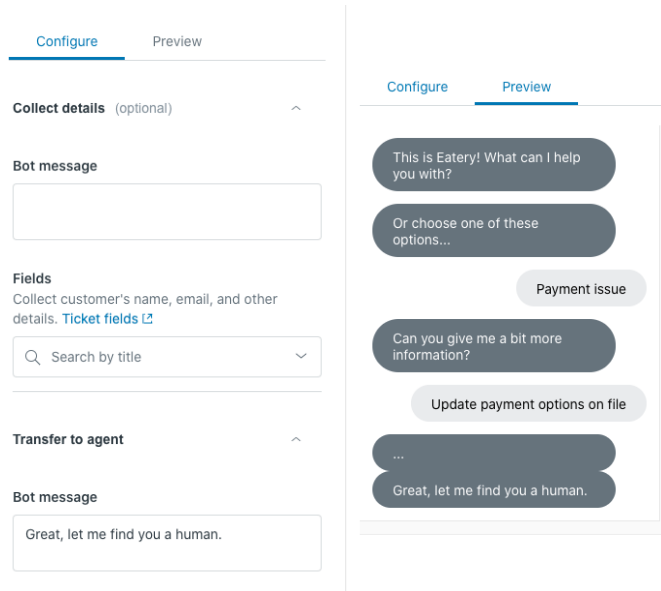
- They configured their flow to first ask the customer what they needed help with, and then gives them the option of entering a message or selecting from one of four options (the most common questions they receive)

This screenshot shows the 'Configure' tab of the flow builder. It has two tabs: 'Configure' (active) and 'Preview'. Under the 'Bot message' section, there is a text input field containing 'Or choose one of these options...'. Below this is the 'Options' section, which includes the instruction 'Present customers with up to 6 options'. There is a list of four options, each in a text box with a trash icon to its right:

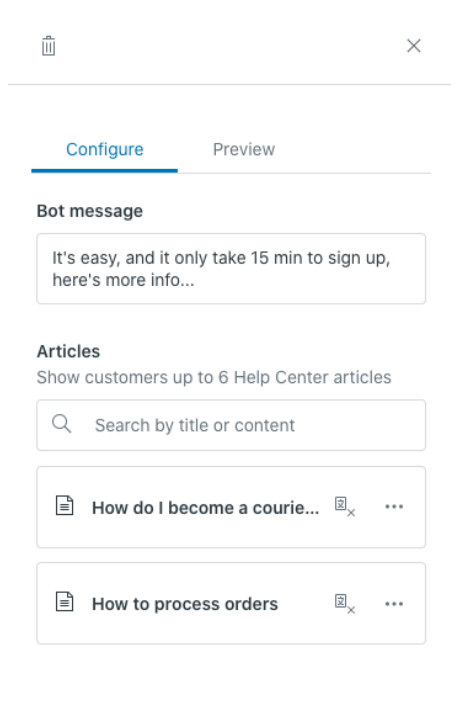
- How do I become a courier?
- Do you have any promos?
- My order is late
- Payment issue

At the bottom of the options list, there is a '+ Add option' link.

- The admins have then configured bot messages and actions based on the users’ response. Say they selected “Payment Issue” and then “Update payment options on file.”



- The admin can customize the bot message to say “Talk to a human,” and trigger the conversation to being transferred to an agent
- Let’s say the customer selected “how do I become a courier?” from the initial four options? Eatery has linked relevant help center articles for this response as a way to streamline support with self service



To learn more about Answer Bot Flow Builder, check out this [help center article](#).

Set Ticket to Closed Status

Recommend a shorter time frame compared to other async channels.

- Recommend something shorter than OOTB 4 days in the default automation.
- Messaging conversations will "re-open" a ticket in Solved status.
- Flow Builder does not "reset" until the ticket is closed, so if the customer is expecting a more synchronous messaging experience, it's ideal to close the ticket as quickly as possible.
- If a customer is not using Zendesk's CSAT or the My Activities fix, then you *could* consider creating a trigger to immediately close the ticket when changed to solve.

Bot marketplace

If you're looking for further customization capabilities, it's best to consider a partner chatbot, such as those offered via the Bot Marketplace.

With the [bot marketplace](#), you can:

- Design a customized experience with support for advanced message types and structured messages.
- Boost agent productivity by streamlining handoffs between bots, Zendesk and other software.
- Manage tickets and trigger workflows in real time with data collected during the conversation.

Use message templates to automate support for WhatsApp

If you're using WhatsApp, you can take advantage of message templates to automate support for WhatsApp messages. This will be especially useful when agents aren't able to respond to WhatsApp messages directly, or they're dealing with other inquiries or may have signed off for the day. In these cases, you'll want to have preset responses ready to keep the conversation going. That's where message templates come in.

- Create a standardized message based on common questions, and set up a WhatsApp bot to automatically send it to customers.
- The bot will customize the response based on the customer's message and their unique information.
- These templates are especially useful for shipping confirmations, support ticket updates, and post-support surveys.
- Besides being convenient, message templates are also necessary for directly contacting customers.

- To minimize spam, WhatsApp asks businesses to [create a template message before reaching out to customers](#). Until WhatsApp approves the template, businesses have to wait for customers to reach out first.

Customization & integrations

Out of the box use cases vs. platform use cases

You don't necessarily need developers or programmers to start offering your customers a better customer experience. Some messaging solutions are out-of-the-box, and it's easy to deploy if you're already using live chat. An out-of-the-box solution is a great starting place for startups, SMBs, and nonprofits. Zendesk's Flow Builder, for example, is a click-to-configure decision tree tool that enables anyone to create and automate conversational workflows.

However, as your needs evolve and your operation scales, you'll need to make changes here and there to optimize CX and keep customers happy. Branching out onto social messaging channels like WhatsApp or Instagram DMs, for example, doesn't require too much overhead. But adding third party integrations or sophisticated AI might mean thinking outside the box: [Sunshine Conversations](#), Zendesk's developer platform, enables businesses to unlock intricate use-cases and harness the myriad data flowing through your customer conversations.

| Out-of-the-box use cases for messaging | Platform use cases for messaging |
|---|--|
| <ul style="list-style-type: none"> • Automated FAQs • Classic customer support • Easy-to-build bot flows • Engage in customer support while your business is offline • Connect to social channels like WhatsApp, Messenger, an Instagram | <ul style="list-style-type: none"> • Self-service integrations to shop, book airline tickets or hotel rooms • Harness conversational data from social channels • Working with partners to create intelligent bots with Natural Language Processing (NLP) • Connect to external tools |

Adding more sophisticated automation may require the help of [a bot partner](#), which can be integrated into the agent workspace to serve more complex use cases.

Metrics that matter for messaging

Shifting to messaging will likely result in a shift of measuring some of the metrics you may have been tracking, like CSAT or First Response Time, for channels like live chat. This is again partly a result of messaging being an asynchronous channel, which means that conversations could last

longer but metrics like CSAT could see improvement.

Ongoing conversations give agents more time to respond while handling more chats. In an asynchronous world, customers can tolerate longer delays in response times. We don't expect our friends and family to reply immediately when we shoot them a text, and that expectation carries over to customer support in messaging, too.

Based on early Zendesk data, here are some metrics that could see improvement when moving to messaging:

Metrics to estimate staffing per shift

Volume

- Messaging volume will likely be lower compared to chat (due to removal of disconnects)
- Volume will also likely be lower across channels

Average conversation duration

- You will likely also notice a difference between live chat and messaging when it comes to average conversation duration
 - Chat
 - i. 8-12 minutes average conversation duration
 - ii. Zendesk Benchmark: 10 min 35 secs
 - Messaging
 - i. Website:
 - 1. Average duration similar to traditional chat session
 - ii. Mobile App with push notification
 - 1. Brands can expect longer conversation duration if the user understands they can reply at their own pace and no risk of disconnect.

Metrics to measure agent performance

Average Handle Time

- Average Handle Time (or AHT), will likely change as the lifecycle of a messaging conversation isn't session based.
- Existing ticket metrics like Full Resolution Time would be the best proxy for AHT as it focuses on the ticket (conversation) lifecycle

Resolutions rates

- Agents have the leeway to consult with a colleague or an external application to compose the *right* answer, increasing first time resolution rates and customer satisfaction.

First reply time

- Session based experiences can create urgency and tension so immediate agent response needed
 - Chat requires waiting in queue/long queue times
 - User must remain in chat to window to avoid disconnect
- Asynchronous experiences
 - Agents can respond to initial messaging requests in real time.
 - If not handled in real time, Messaging First Reply time can extend out compared to chat best practice but end user expectation still need to be set correctly via Auto Response trigger or within Messaging Window (eg, Header, Greeting, Transfer Step)
 - Note: Although messaging is asynchronous, brands will still need to minimize first reply time (eg, under ~10 minutes) to avoid channel hopping and low CSAT. Auto Response message (via Chat Triggers) also plays into setting initial expectations.
- Mobile vs web
 - If the conversation involves a mobile app but there is no push notification, then agents should treat the situation like it is synchronous to avoid poor consumer experience since there is no way to inform the consumer of an agent reply.
 - For conversations over desktop, experience there was that consumers tend to treat messaging similar to chat since the difference between chat and messaging is not always apparent to them. As such, agents in a desktop messaging scenario should treat the conversation like it is synchronous. This is dependent on how engaged the consumer is in the messaging window.
 - After FRT, recommendation is to treat the conversation like it was synchronous if the agent sees the consumer is engaged or has recently responded.
 - With the Zendesk Agent Workspace, there are a few items to help an agent treat the conversation like it was synchronous and inform them how engaged the consumer is (real time agent notification, active icon indicator, typing notification, read notification).

Overall health & quality of conversations

CSAT

- Customers like the fact that they can pick up a conversation right where it left off on web and mobile, without having to repeat themselves, which can be a positive for CSAT.
- The convenience of being able to reach a brand on a customer's preferred channel can also positively impact CSAT.

SLAs

For traditional contact centers, the commonly reproduced [80/20 SLA](#) suggests that 80 percent of calls should be answered within 20 seconds. In the case of messaging, the approach to managing service levels can be quite different. If SLAs are an important KPI to measure for your

business, then a longer answer time (such as 90/300) might be more appropriate. However, organizations may wish to embrace other KPIs better adapted to asynchronous communication methods, such as concurrency, active time, and idle time between responses.

VIII. Glossary

Key messaging terms to know

| Messaging word / phrase | Definition |
|--|---|
| Persistent (or asynchronous) conversations | Ongoing conversation between an end-user and an agent over a messaging channel, where the conversation history is saved, and allows the end-user to leave the conversation and pick it back up at a later date, without having to repeat themselves. |
| Session-based (or synchronous) conversations | Real-time conversation between an end-user and an agent, where the conversation history is not saved if the agent or end-user leaves the conversation. |
| Automation | Allows agents to automate common support queries through bots, ie Answer Bot and our bot partners, via auto responses, and allows admins to configure conversation flows as part of bots, via Flow Builder. |
| Web SDK | The new web messaging capability, as part of Zendesk messaging, which allows a brand to embed messaging support on their website. |
| Web Widget | The web chat capability, as part of live chat. |
| Sunshine Conversations | Zendesk's messaging platform, which enables businesses to unlock advanced use cases (not available out-of-the-box with Zendesk messaging) |
| Live chat | Refers to Zendesk live chat, which includes the Web Widget and Chat SDK channels. These channels only enable session-based conversations, and include advanced features but lack new capabilities included in the new Web SDK and iOS and Android SDKs. |

IX. Resources to get you started

Businesses can and should be wherever their customers are. And no matter what channel they use to reach out now or in the future, these interactions should be seamlessly woven together so that each becomes part of a larger conversation. This ensures that customers never have to repeat themselves, while businesses get the context they need to deliver faster and more personalized experiences.

Learn more about how Zendesk messaging can help you exceed your customer's expectations for support on any channel.

Resources:

Help center

- [About Zendesk messaging](#)
 - [Enabling and disabling the agent workspace](#)
 - [Working with messaging in the Web SDK](#)
 - [How Zendesk messaging impacts chat settings](#)
 - [Chat triggers in Zendesk messaging](#)
 - [Using Flow Builder to automate conversations](#)
 - [About Answer Bot for Zendesk messaging](#)
 - [Zendesk messaging vs. live chat -- which is right for you](#)

Demo videos

[Demo videos](#) (three in total, embedded in the announcement post)

Blog post

[Live chat vs. messaging blog post](#)

APPENDIX

In collaboration with:

| Reviewer | Title |
|------------------|---------------------------------------|
| Abhi Basu | Director, Product Marketing |
| Prakruti Hindia | Principal Product Manager |
| Shiyu Zhu | Senior Product Manager |
| Miranda Burford | Senior Product Manager |
| Steph Langlois | Product Manager |
| Farhad Bharucha | Customer Success (Messaging SME) |
| Brian Migdol | Customer Success (Messaging SME) |
| Andrei Manolache | Solutions Consultant (Messaging SME) |
| Lawrence Ng | Solutions Consultant (Messaging, SME) |
| Holly Gill | Services Consultant |

Content timeline

We'll use this content from this guide for upcoming customer-facing content, including:

| Content | Date |
|---|-------------|
| Webinar: Prepare your support team for messaging | April 22 |
| Customer-facing guide / eBook | Mid June |
| Help center articles | TBD |
| Onboarding assets | TBD |
| Sales/Success/SC/PS facing deck | Mid May |
| Customer-facing deck on best practices (intended for SC/PS/CSEs), including use cases | TBD |