

## CASE STUDY

# Seamless migration to a new customer support platform empowers a SaaS provider to deliver superior CX while gaining valuable customer insights



## Executive Summary

<b>WHO</b>	Cloud workspace innovator
<b>GOAL</b>	Improve capabilities around customer support
<b>CHALLENGE</b>	The current customer support and ticketing system lacked the breadth of functionalities the company needed to support its fast growth
<b>SOLUTION</b>	Seamless migration to Zendesk and enhanced business process modeling
<b>RESULT</b>	Better capabilities around handling customer support tickets, customer analysis, performance, workforce management, and reporting, all leading to improved CX and customer insights



## Overview

Our customer is a fast-growing SaaS provider that had been using its ticketing system for several years. As they grew, they began to need more robust functionalities and partnered with iTalent Digital to achieve two key outcomes:

1. Seamlessly migrate the CX organization to Zendesk.
2. Support the Lead to Order (L2O) business process modeling with key cross-functional stakeholders.

## Challenge

Because they had been using the legacy system for several years, a vast amount of data (involving one million ticket records, 30 million organization records, and 39 million user records) from both opened and closed tickets needed to be seamlessly migrated and teams needed to be trained on the new platform, all while they were busy doing their normal jobs.

## Solution

After working with the client to define overall objectives, the scope of engagement, their cross-functional engagement model, current in-flight priorities and backlog of outstanding scope items, iTalent Digital got to work on the following deliverables:

- Documentation of process flows
- Process modeling assets
- Development of an enhanced customer data process
- Design of the new business solution (process/capability/policy/customer data architecture)

Deliverables specific to the Zendesk migration include:

- Definition of business requirements (user stories/epics) in collaboration with the client
- Root cause analysis
- Production of the enhancement road map
- Configuration of the new platform
- Execution of requirements
- Change management, including training on the new platform
- Creation of required reporting and dashboards

Post-migration, the iTalent team delivered:

- Governance on the new system with a more granular set of admin, team lead, and agent roles
- Streamlined workflows to ingest ticket submissions
- Created KPIs to track agent progress and efficiency
- Worked with client to create dynamic content to support multiple languages within their instance

## Results

The customer experience organization now has a more robust and flexible system with better capabilities around customer analysis, performance, workforce management, and reporting. This enables more valuable and actionable customer insights for the company and empowers it to deliver a superior customer experience. Thanks to the success of this project, iTalent Digital was tapped to migrate other groups to Zendesk, starting with Finance and Security.

## About iTalent Digital

iTalent Digital is a global woman- and minority-owned software engineering and full-service tech consulting company headquartered in Silicon Valley that champions the people side of tech. We challenge the status quo and help companies achieve exceptional business outcomes through a suite of digital transformation services such as enterprise collaboration, personalization and unified search, data transformation and business intelligence, SaaS solutions, and change management.

The team has numerous awards to its name, including 25+ Stevie® Awards, two Forrester Groundswell Awards, five Khoros Awards, two Globee® Disruptor Company of the Year Awards, three IT World Innovation Awards, two Cisco Responsible Procurement Awards, and many others.



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