

Macros for support responses	
<b>Project Description</b> Increase efficiency or workload by automating any possible element of daily tasks	<b>My Role</b> Creator / Co-Project Manager

## The Challenge

When I first began working in Zendesk's Support product, their help desk ticketing system, as part of the Educational Technology team, we seemed to handle a lot of daily inquiries with individual, manually created, custom responses that were often on the same issue. Without an updated knowledge base platform at the time, it was hard to refer users to instruction for the routine inquiries, or easily share instructional changes and updates.

### *Login to Account*

This macro should be used to guide users on logging into MyCU, the school's primary account for personal management, time entry, HR, registration, billing, and more.

```
## _Access MyCU_

1. Proceed to [_**MyCU**_:](https://mycu.cu-portland.edu/)
**https://mycu.cu-portland.edu/**
2. Click **_Enter Secure Area_**.
  ![mycu_sign_in_1.JPG](https://i.imgur.com/DHF1e5z.png)
3. Sign in using your MyCU credentials as follows:
  ![mycu_sign_in_2.JPG](https://i.imgur.com/M6SfpcV.png)
  * _User ID:_ Your G#, `G00123456`
  * _Note: Your user ID must include a capital_ `G`
  * _PIN:_ This is your [MyCU PIN]
  (https://support.cu-portland.edu/hc/en-us/articles/360011225873)**_
  * _Note: This is not the same as your password for
  email or Bb. Your PIN is different than your password!_
  Learn how to [reset your PIN here](https://support.cu-
  portland.edu/hc/en-us/articles/360011225873)** !
```

```
personal, tax, and enrollment, and more!_
```

\*\_We suggest typing [this](#) in manually to ensure success!\_

4. Click the **\_\*\*Login\*\*\_** button.

5. You can now access personal, tax, [and](#) enrollment information, [and](#) more!

*Instructions from a KB article exported to Markdown for use in a support ticket response.*

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## Brief Summary

Improved success and satisfaction rates and increased response efficiency for EdTech support inquiries by creating a standard for support user responses and creating a large library of macro responses for common issues; whereas users were not clicking links, when the instructions were embedded in the message, users completed the actions more readily.

## Approach

As I explored the Zendesk interface and help guides, I found that a basic markup language called Markdown was supported. I quickly learned Markdown and established a basic organizational convention to write up instructional responses for each inquiry that came in with an external text editor that handled syntax highlighting, SublimeText 3.

Coupled with Zendesk's powerful tags, it was possible to create a library of basic instructional macro responses.

## Goals and Objectives

- Create reusable response templates for support communications on routine inquiries
- Increase efficiency of support response time
- Utilize/integrate instructions available from knowledge base, etc.
- Incorporate Zendesk platform's tags to create macros that still lend an element of personal touch to otherwise routine responses

## Ideation/Design

Users prefer having instructions with images that clearly articulate their journey in a concise, but skimmable format. By the time they get to support, they have already have problems and are frustrated. First time resolution was at the forefront of mind

have problems and are frustrated. First-time resolution was at the forefront of mind during creation of the instructions, revisiting after any interaction that may have presented an opportunity for improvement or clarity.

- Clear, concise instructions, with relevant screenshots depicting user experience
- Optimize for first-time resolution and reduce repeated agent touches

### ***Support macro for transfers***

You may wish to use this generic support macro to get transferring folks in touch with the technology folks at Example University.

```
Hi, {{ticket.requester.first_name}}:  
Thank you for your message.
```

```
For assistance with IT services regarding your transition  
to Example University (EXU), we would recommend reaching  
out to the EXU Help Desk.
```

```
* **Phone:**_ (XXX) XXX_XXXX  
* **Email:**_ help@exu.edu
```

```
The EXU Help Desk website has a lot of great information,  
which may fill in some of the gaps in what you may  
already have received with your transition/transfer  
communications.
```

```
* _**[EXU Help Desk](http://crystalmhines.com)**_
```

```
We hope this information is helpful,  
{{ticket.requester.first_name}}!
```

```
Thank you and best wishes on your new journey with our  
friends at Example University.
```

*A template response formatted in Markdown to be used as a referral for a transferring student.*

## **Outcomes & Accomplishments**

Improved success and satisfaction rates and increased response efficiency for EdTech support inquiries by creating a standard for support user responses and creating a large library of macro responses for common issues; whereas users were

not clicking links. When the instructions were embedded in the message, users completed the actions more readily. First-time resolution skyrocketed under this model, with less screenshares and calls required of agents.

Making use of our existing and converging projects to improve documentation meant we could create contextually-accurate resources that were more survivable, hotlinking to images in the knowledge base inside of our support macros. These would then be visible to recipients within their email, no further action necessary for the user -- no forceful referral to a link because these instructions were married with the knowledge base instructions and maintained by the defacto knowledge manager for all to use as needed.

This method of support was so helpful to the end user that my ability to substantially outpace teammates in support resolutions and still maintain other position duties and project responsibilities maintained, even as we became a more and more lean team through budget cuts and force reductions.