TIDIO
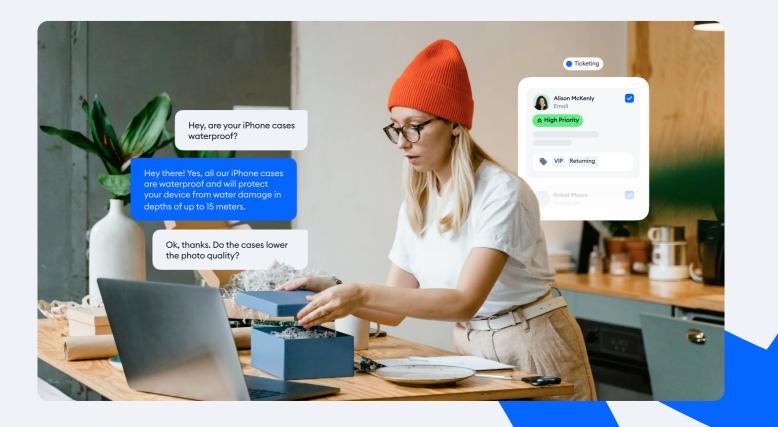
Successful Help desk Checklist

Be prepared for your Help desk launch

Communication channels

Current customers expect brands to be available on their preferred application. Multi-channel strategy has proven to increase Customer Satisfaction.

💬 Live conversations

☐ **Live chat**
Live chat feature is the best way to provide customer support.

☐ **Instagram account(s)**
Connect your Instagram to keep engaging with your audience.

☐ **Facebook Messenger account**
Move your Facebook Messenger conversations to unified interface.

☐ **WhatsApp phone number(s)**
Include WhatsApp number to ensure your customers can reach you via text message.

✉️ Emails

☐ **Mailbox(es)**
Connect all the email addresses that are available for your customers to contact you.

☐ **Your own domain**
To increase credibility, make sure that you connect your domain with your Help desk.

☐ **Sender address**
Make sure to use your business appropriate email address or default to industry standard - help@domain.com.

Customer Service Workflow

To get the most out of your help desk software, you need to set up rules of operation and automations to simplify repetitive tasks.

Workflow Automations

☐ **Views**
Create unique views to track most important messages flowing into your Inbox.

☐ **Automatic response**
Define automatic response for newly created tickets, to keep Customers informed.

☐ **Canned responses**
Create standardised responses that are easily available for support agents to use.

☐ **Chat auto-assignment**
Avoid complex triage by enabling automatic chat assignment.

☐ **Automatic solve**
Solve chats without Customer response to keep your Inbox organised.

☐ **Gather Feedback**
Use automated feedback survey to measure Customer Satisfaction, one of the key metrics of your Customer Service Team.

Business Rules

☐ **Operating hours**
Set the operating hours for each agent to match your business hours.

☐ **Service Level Agreement (SLA) policies**
Keep your Team accountable for the timely responses to customers.

AI Chatbot

AI is taking over the world, with customer support teams getting huge productivity boost from being able to automate mundane tasks and returning questions. Here's what you can do to make AI part of your strategy from the get-go.

📖 Knowledge Base

☐ **Your website**
Allow AI Chatbot to use your website as a source of knowledge, make sure to add all necessary URLs.

☐ **Frequently Asked Questions**
Add FAQs or generate them from most common questions in your industry.

☐ **Test**
Use Playground to test the AI Chatbot and tweak the knowledge as needed. Approach this as the first day of a new agent, aiming to assess their initial performance.

🤖 Configure AI Chatbot

☐ **Multi-language**
Enable multi-language support to respond to customers in their own language.

☐ **Handoff**
Define the rules on how AI should approach handing the conversation over to Agent.

☐ **Tasks**
Choose from existing templates or craft custom flows to control the AI Chatbot's responses in advanced scenarios.

☐ **Personality**
Configure your chatbot personality to match your brand.

Last steps

When your Help desk is ready make sure your Team has all appropriate access and their function is assigned. Remember that Customer's expectations are rising, so keep improving your Help desk performance.

👥 Team

☐ **Agents**
Add all your Customer Service Team members and other staff to your platform.

☐ **Roles & Permissions**
Define roles and permissions for Team members to ensure safety and data privacy.

☐ **Departments**
Divide your Team into departments based on their skillset or role in organisation. Route appropriate mailboxes to right department.

☐ **Signatures**
Create custom signatures for your agents to maintain a friendly and professional appearance.

🚀 Post - Launch

☐ **Analyse Help desk Performance**
Measure FRT and CSAT that are key indicators of your Team's success. Use detailed views to drill down the performance per Agent, or hourly effectiveness.

☐ **Apply Feedback**
Constantly look for your Customers' feedback to improve your processes.

☐ **Analyse AI Chatbot**
Monitor your AI Chatbot conversations and improve knowledge should you need to.

☐ **Use historical conversation**
Allow your AI chatbot to learn from your chat history and use this data to expand its knowledge further.

Boost your customer satisfaction score by 24% with Tidio AI Help desk

Everything you need for great customer service packed in an intuitive help desk software.

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