

ANONYMISED EXAMPLE · MULTI-SITE PARKING OPERATOR

Zendesk Health Check & 12-Month Roadmap

The operation works because of your people, not because of your platform.
Here's what we found, and how we fix it.

What we assessed

01

Discovery call

WEEK 1

The Head of Customer Service on the business, revenue model, growth plans and constraints: three revenue streams, 90+ car parks, two large clients landing next quarter.

02

Day in the life

WEEK 3

Shadowing the support team through real intercom calls, device troubleshooting, the refund chain and the monthly client reporting grind.

03

Technical review

WEEK 4

A full crawl of the instance: forms, fields, triggers, SLAs, macros, help centre, telephony, AI and seat usage, scored against our adoption framework.

Scope note. This covers Zendesk and the workflows running through it. The client portal, booking system and device-management platform are referenced where they touch support. The app and website rebuild is a dependency owned by your tech team, not a deliverable of ours.

What's genuinely working

✓ First reply time

Genuinely strong, and under real pressure. A driver at a boom gate gets a human fast. That's the hardest KPI in the operation and the team hits it.

✓ The phone operation

Four lines through Zendesk Talk, priority intercom line answered first, clear escalation path. The telephony build is sound. It's the data around it that's missing.

✓ 70% first-contact fix

Around seven in ten device incidents are resolved on the first call: portal check, certificate refresh, remote device reboot. That's a well-drilled runbook. Support lead's estimate during our shadowing session.

✓ Macros the team trusts

10 of 17 active macros used in the last month. Agents reach for them by instinct: the raw material for structured, automated responses.

✓ Clean seat hygiene

17 of 18 paid seats active in the last 90 days, custom roles and statuses all in use. No licence sprawl to clean up.

Eight years of drift

The instance is configured much as it was eight years ago, while volume grew to 8,000+ calls a month.

HIGH

No data architecture

2 ticket forms, no organisation fields, and 7 of 9 custom fields on no form at all, so agents can never fill them.

HIGH

No self-service at all

No public help centre. 10 of 59 articles published, 83% still draft, median last edit over 12 months ago.

HIGH

Reporting runs on Excel

Explore is essentially untouched. The support lead tags, exports and re-types ticket notes into spreadsheets for every client report.

MED

No AI, either side

No Copilot for agents, no AI agent for customers: the two biggest available levers, both switched off.

HIGH

Intercoms are anonymous

Calls land as unlabelled mobile numbers. Agents cross-reference a list to work out which gate is calling, while a driver waits.

HIGH

SLAs don't fit the channel

One SLA policy, untouched in 12 months, not aligned to voice. Priority is set by hand, so quality can't be measured.

MED

Refunds bottleneck on one person

100% route to one manager via chat, then finance, then a spreadsheet. Reasons aren't standardised and there's no audit trail.

MED

Ops coordination sits outside Zendesk

Field-tech escalation happens in a Slack channel, invisible to reporting, and about to break in the Teams migration.

The risk is timing. **Two large clients onboard next quarter** onto a platform that can't segment by customer, can't report by site, and deflects nothing.

One problem underneath all of them

Zendesk has no structured record of **who** is contacting you, **from where**, or **about what**. Without that, nothing downstream can work.

No forms, user fields or org fields



Nothing to route, prioritise or automate on



No SLA that means anything, no Explore dimension



Reporting done by hand, in Excel, every month

WORKED EXAMPLE · THE INTERCOM

It's a data problem, not a telephony problem

Every intercom already dials the 1300 line and raises a ticket. That part works. The intercom's mobile number *is* held in Zendesk. It just isn't named or mapped, so it means nothing to the agent.

Name each intercom record properly and map it to its car park and gate, and the moment the call lands the agent sees **exactly which gate is calling**, and every call becomes reportable by site.

"5 seconds feels like 30 minutes to a person at a boom gate."

Head of Customer Service, discovery call

Stop the call before it starts

1

A real help centre

Use AI to draft articles from your own historical tickets: insufficient funds, terminal errors, anti-passback, scanning failures. Publish the customer-facing set, keep internal content private.

2

An AI agent that troubleshoots

Pre-qualifies the device issue, then calls the portal and device-management APIs to check status and reboot, before a human is involved. Your 70% first-contact runbook, automated.

3

Copilot on every call

Live in-call recommendations while the agent talks, and an AI summary of the transcript written back to the ticket afterwards. Less wrap-up, better notes, from day one.

THE SCALING PROBLEM THIS SOLVES

Today every new client onboarding means another agent. With the foundation, automation and AI in place, the business absorbs the new onboardings, and what comes after, without linear headcount growth.

8,000+
CALLS PER MONTH

Support that also sells

You pay Google and Meta to bring drivers to the site. You earn commission when they pre-book. Right now, nothing on the page answers a question or closes a booking.

An AI messaging agent on the website does both jobs at once: deflecting the service question *and* converting the sales one.

Live chat already exists in your instance and is underused. The capability is paid for. It just isn't switched on with intent.

SERVICE QUESTION

"My boom gate won't open at Central Plaza."

→ Deflected. Never becomes a call.

SALES QUESTION

"Is there parking near the stadium on Friday night?"

→ Answered, matched, booked.

WHERE THE VALUE LANDS

- ✓ Higher conversion on the paid traffic you're already buying
- ✓ Commission revenue on pre-books that would otherwise bounce
- ✓ 24/7 coverage without a 24/7 roster
- ✓ First-party data on what drivers actually ask before booking

Cost centre to contribution

Directional, not forecast. The client had no baseline captured in Zendesk, and establishing it is step zero.

LEVER	DIRECTIONAL IMPACT
Deflection	Fewer of the 8,000+ monthly calls reach an agent, as common device and booking issues resolve themselves.
Answer times	Faster against the boom-gate KPI via automatic site identification, priority queues and AI pre-qualification.
Agent efficiency	Lower handle time through structured intake, Copilot assistance and portal and device-management integration.
Reporting time	Manual Excel exports for leadership and building-management reports disappear entirely.
Scaling	Absorb the two new client onboardings and future growth with far less linear increase in headcount.
Revenue	AI-assisted website messaging converts pre-book sales from traffic you already pay for: support contributing to the top line, not only cost.

Twelve months, in order

The order is deliberate. Foundation → automation → AI → insight. Nothing later works well without the layer beneath it.

MONTHS 1-3 · NOW

Foundation, Copilot & reporting

- Move to Zendesk Suite + Copilot at the renewal date; right-size seats
- Full data mapping: ticket fields, forms, user and org fields
- Register every intercom to its car park and gate
- Automated client reporting by customer, intercom and location
- Switch on call recording; tidy macros; bump-bump-solve

OUTCOME

From zero visibility and hours of manual reporting, to full visibility and automated reporting.

MONTHS 4-6

Rules, queues & SLAs

- Customer-based priority queues on the new data structure
- SLA policies by channel and priority, so quality is measurable for the first time
- Triggers and automations for routing, triage and auto-priority
- Refund workflow rebuilt in Zendesk with approval routing and audit trail
- Ops and shared inboxes into Zendesk via side conversations

OUTCOME

Full operational flexibility across both segments: B2C drivers and B2B building clients.

MONTHS 7-9

Self-service & AI deflection

- Public help centre, articles AI-generated from historical tickets
- AI agent across email and messaging, troubleshooting via portal and device-management APIs
- Website messaging with AI: deflection *and* pre-book conversion
- Deflection baseline set and measured

OUTCOME

Better service, sales questions answered instantly, and a smoother booking experience.

MONTHS 10-12

Scale & optimise

- Leadership Explore dashboards: volume and resourcing by car park
- Voice performance by line and location
- SLA and service-KPI reporting layered into client reports
- Tune AI, expand automation, flex capacity across the day
- Quarterly business review and a year-two roadmap

OUTCOME

A fully integrated support layer, connected to the business information that matters, for operational excellence at scale.

Why the next six weeks matter

TWO DATES CONVERGE

Next quarter

Two large clients onboard. Support demand steps up materially, and whatever platform they land on is the one they'll be reported against.

At renewal

Zendesk renewal. The one clean moment to move off the legacy plan onto Suite + Copilot and right-size seats, without a mid-term negotiation.

Onboard the new clients on a modernised platform, rather than adding load to the current setup and unpicking it later.

FAST WIN 01

Copilot, from day one

In-call recommendations and AI call summaries written back to the ticket. Value before any deep configuration is finished.

FAST WIN 02

Call recording switched on

Already available on the current plan, and it simply needs enabling. It underpins quality review, and AI call summarisation on top of it requires Zendesk Copilot.

FAST WIN 03

The manual Excel reports, gone

Ticket volume per customer, per intercom and per location, delivered to clients automatically once the data structure lands.