The Complete Guide to

Project Management For Customer Service Teams

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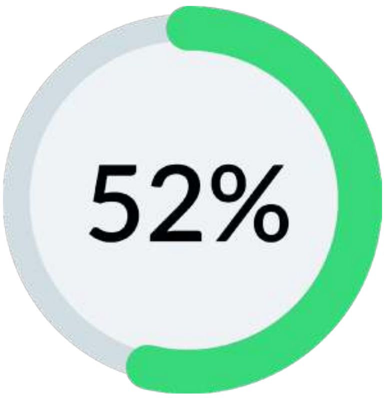
Customer Service Matters

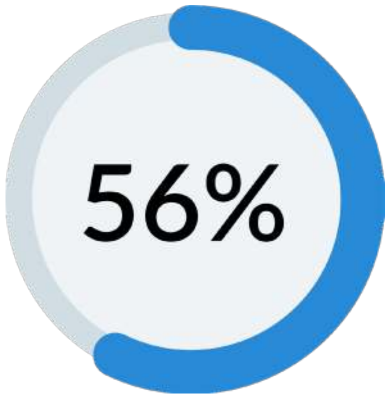
Strong project management will take your customer service team to the next level, and help your business stand out.

Introduction

Customer service teams the world over are under more scrutiny and pressure today than ever before. The age of instant information brought with it an age of instant expectations, and service teams are being pushed to respond and address issues more quickly and efficiently with each passing year. While it might seem counterintuitive, having a strong, high-level project management strategy can actually help you better meet those granular client needs.



of consumers have made an additional purchase from a company after a positive customer service experience.



of people around the world have stopped doing business with a company because of a poor customer service experience.

While customer success teams have the luxury of working on long-term projects for existing clients, when you manage a customer service team, it can be hard to focus on anything other than what's right in front of you. Every day is a scramble to close tickets, address customer feedback, and generally just take on whatever is thrown at you — which let's be honest, is never the same thing from one day to the next. The idea that you should invest a bunch of time that you don't have into a brand new project management strategy probably sounds insane.

But if you nodded your head to everything that was just described, you've already acknowledged a few important things: First, every day you're rushing and scrambling, working under pressure, and maybe never really feeling organized; second, each new ticket brings the possibility of a never-before-encountered situation or issue, one that will strain the processes you have in place, if not break them entirely.

This is where a project management strategy can make a huge difference for your customer service team. It can help you bring order to chaos, while preparing your team for how to deal with the unknown.

With that in mind, we've created "***A Complete Guide to Project Management for Customer Service Teams.***" This guide will cover:

- **Why traditional project management methods fail customer service teams, and the approach you can take instead;**
- **The customer service and project management tools you should know, including the pros of each, so you can pick the tools to support your strategy;**
- **Tips and tricks to help you meet those increasing client demands;**
- **Use cases so you can clearly see what this looks like in practice;**
- **Finally, a summary of what you should take away from this guide, as well as some helpful templates you can use with your own team.**

Strong project management will take your customer service team to the next level, and help your business stand out from the competition.

Ready to get started?

Waterfall
Critical Path
Agile
Scrum

You may have heard of one or all of these popular project management methods — but probably don't use them.

Project management methods

Why most project management methods fail customer service teams

Waterfall. Critical path. Agile. Scrum.

You may have heard of one or all of these popular project management methods — most companies have a favorite that drives their approach to work and the tools that they choose. Many of you won't know these methods though, because most customer service teams don't use any of them.

This is by no means a failure of service teams either; it's a reflection of the fact that none of these methods are built for customer service, because none of them are quite as "reactionary."

Generally, all projects have **five key stages:**

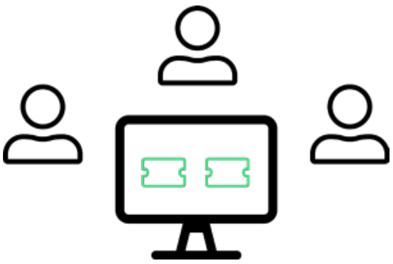
All of the popular approaches to project management focus on a series of individual tasks that make up a stage, with all stages building up to some pre-planned project goal. The methods you ensure you're staying on top of tasks and flowing naturally from one stage to the next. In customer service, by contrast, the equivalent of one task might be the entire "project."

Usually CS teams are reacting to an issue, not planning anything and the entire 'project' could last minutes, as opposed to days, weeks, or months. The first stage, "defining the problem," is usually done by the customer, stage two is often skipped if the solution is already known, and stages three through five are lump together. A ticket comes in, you tell them to try unplugging it and plugging it back in again, it works, you close the ticket. End of project.

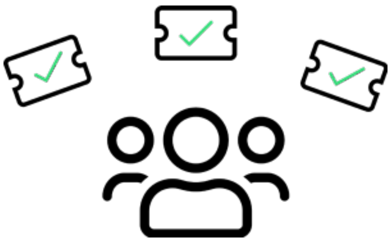
It's not always that simple of course, but generally customer service teams are working towards quotas or reply rates, not some large scale project. They don't have the time to dive into each project stage. Let the customer success, development, and marketing folks deal with new features and bugs while you tackle issues clients are facing right this second.

So what does this look like?

You have specific customer service channels identified (email, live chat, social media) and these feed into some sort of queue or delegation tool (we'll dive more into tools later on).



Incoming issues are assigned to one of your customer service agents (stage one of the project).



The agent either resolves the ticket themselves (80% or more of the time), using existing knowledge or by consulting an internal resource document/ knowledge base. If the issue is new or challenging, the agent might also need to consult a colleague or another department for answers or help (stages two to four of the project).

The ticket is closed (stage five of the project), and onto the next one.

You may not think that this is worthy of the title “project management.” Afterall, where are the five project stages listed above? Even many customer service managers just see a simple process intended to maximize speed, keep customers happy, and check off those KPIs.

But this ignores at least two key situations that all customer service teams face, if only on occasion:

- **Challenging issues that require an extended period of time or senior approval to resolve.**
- **Opportunities that would allow your team to contribute to their own long-term success or the success of the entire company.**

If you’re willing to invest a bit of effort into project management, you can actually save your team time down the road and greatly increase your output in those two areas.

Preparing for the unknown with project management

Let’s dive into the first scenario. A ticket comes into Zendesk that your agent can’t handle on their own. For whatever reason, this particular issue requires an executive at your company to get involved. In many companies, you can’t just ping a senior director like you might ping a developer for help. Suddenly, the process your team uses for 95% of tickets goes out the window.

So what do you do? Maybe you send an email or make a phone call. Maybe you can walk over to their office and explain the situation in person. Maybe, at a larger organization, you need to book time in their calendar or contact their assistant to find a slot. Then you need to explain the situation so they have the full background and hope that they understand it, and know how to help resolve it. You’re probably talking about hours of work, instead of your typical minutes, and this can make a big impact on your KPIs, especially on a small team.

How would project management solve this? Let’s look at this particular ticket as a project.

You've defined the problem as the ticket came in, and have started scoping the solution but realized that it requires senior involvement. Thankfully, because you have a project management mindset, you've already established a system for handling issues like these. This ticket is then flagged as "Requiring Senior Approval" in your system. This leads to a very specific workflow, which creates a task labelled as urgent on your executive's project management tool. The senior manager has access to the entire ticket for background, and knows that these situations require resolution within hours, not days. Approval is provided in the task, giving the agent the ability to solve the issue and close the ticket. This method was planned for, institutionalized, and supported by the tools required to make it happen (more on that below). It's quick, and eliminates barriers preventing your team from accomplishing their goals.

Build in processes for long-term efficiency

The first scenario blends very clearly into the second. How was this method for handling unknowns established in the first place? Maybe an enterprising member of your customer service team encountered a few of these tickets in the past. Knowing how they bogged down the team, this person decided that having a method in place would help save the team time and potentially help retain the clients who face this issue. So they dropped the idea in your team's project idea board within your project management tool. This was chosen by you, the team manager, as a viable project and you began creating the process to solve it. You contact executives to set up the flagging and urgency system, ensure everyone is properly trained and informed, and then implement the process. Suddenly, scary tickets seem a lot less scary.

In the first scenario, you've managed to save your team time and effort in the resolution of an issue. In the second scenario, a team member has identified an opportunity to improve process and save time and effort long-term. Both of these situations fall outside of your typical customer service process, but both of them are more than worthwhile. This is how project management can change the game. Also core to both of these situations? Having the right tools in place to help you better manage your projects.

Tools For Success

Having the right tools in place is essential for customer service teams.

Choosing the right customer service tool

One thing common to all the processes and scenarios we've mentioned so far? They rely on tools for resolution.

Having the right tools in place is essential for customer service teams. They increase productivity, support collaboration, and facilitate communication with your coworkers with your customers.

There are probably hundreds of different customer service tools out there, so how do you choose the right one for your team? There's no easy answer to that question. Depending on your business and your audience, you may just want to make a list of your specific needs (including price point) and then compare various tool offerings.

That said, if you're not even sure where to start, it's never a bad thing to look to the industry leaders. In the case of customer service, three of our absolute favorite tools are:

- Zendesk
- Hubspot Service Hub
- Jira Service Desk

All three of these options support knowledge bases, are fairly customizable, and play well with many other tools in your toolbox — really important features when it comes to project management for customer service.

Zendesk: The industry leader

With over 125,000 clients around the world, Zendesk is the clear leader in the customer service industry. That's in large part due to their beautiful, simple-to-use but comprehensive platform that's surprising easy to scale alongside your business.

Whether your main source of customer tickets is phone, chat, email, social media, or just about anything else, Zendesk has you covered. They also provide the ability to create "ticket forms," essentially preset support request forms with a unique set of fields based on the need — a great feature for helping you project manage difficult issues. And with Zendesk you can set up business rules that can, for example, send tickets to certain agents based on skillset, or change up the ticket workflow based on specific triggers.

Where Zendesk stands out:

Lots of opportunities to adjust workflow and processes through automation

Accessible plans for all team sizes

Great analytics and a benchmarking tool for comparing your team and company's performance

Hubspot Service Hub: A well-rounded solution

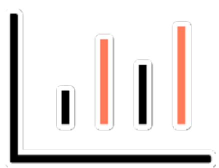
Hubspot is on a mission to provides its users with solutions for everything (and we mean everything) they could possibly need to manage their business. From CRM, to sales, to marketing, Hubspot's offering can help your teams become tool-aligned very, very quickly. That's the real strength of Hubspot's customer service offering, Service Hub: it allows you to integrate all customer data across service, sales, marketing, and success, and keep it in one place.

The tool provides a central inbox called "Conversations" which all issues from all channels flow into. This is meant to improve team collaboration on tickets (and if you do use Hubspot CRM, historical context on the customer is automatically added to the ticket at this stage). There's also functionality for automating processes and escalating tickets, as well as survey and reporting tools. Service Hub checks a lot of important boxes and is a great option for most teams.

Where Hubspot Service Hub stands out:

Built with organizational collaboration in mind

Provides in-person or live online training for large enterprises



Great at linking customer service performance to overall business performance

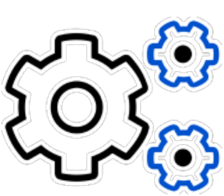
Jira Service Desk: The leader for IT support

Don't be scared off by the word Jira. Yes, the original platform can be intimidating for non-developers (though it doesn't have to be), but Jira Service Desk is great for both IT and customer service teams.

Not unlike Jira, Service Desk is very customizable, with over 800 compatible apps on the Atlassian marketplace. That said, it's actually pretty easy to get set up on the platform using their customer service templates. They also suggest automation rules and business processes if you need an extra hand getting started.

Atlassian suggests hosting your knowledge base on Confluence. That way, you can be sure it will integrate smoothly with Service Desk and you won't have to jump back and forth between different tools.

Where Jira Service Desk stands out:



Naturally, it fits seamlessly with Jira for any dev tickets or issues

Really customizable

Can be run on cloud or on-premise

How to connect customer service tools to your project management tools

One consistent challenge faced by customer service teams is that a lot of their work requires collaboration with other departments in the organization. The three tools above have lots of integrations and apps which may help you work better with other teams. But if the apps don't provide the full functionality of the tools they're used to, you might find yourself back in email or a chat app trying to sort things out. Even worse, one team might end up having to jump into a tool they don't actually use to collaborate on the ticket.

Having to jump between tools on a daily basis can be extremely time consuming. Whether you're busy copying and pasting ticket info into a Jira issue, or you're investing time you don't have into onboarding your agents onto tools like Bitbucket, Asana, or beyond, this is valuable time you're not spending helping customers.

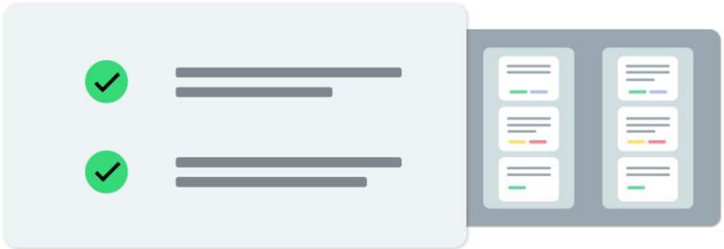
With that in mind, we sought out to solve this issue by building connections between customer service tools and project management tools. With Unito, customer service teams can sync their Zendesk and Jira accounts to a slew of other project management tools, including:

Trello Wrike Asana GitHub GitLab Basecamp Bitbucket

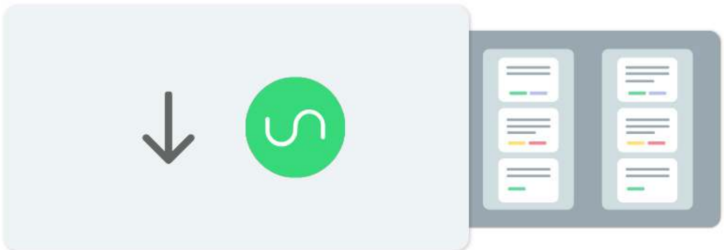
Details like ticket status, due dates, priorities, internal notes, assignees, and custom fields are synced two-ways between the tools, so any update made in Zendesk or Jira is made in the other platform, and vice versa.

This allows you to better collaborate with other teams and departments without fighting over which tool to use, or wasting time using different tools for different projects. It also helps customer service teams maintain control over tickets even while the issue is being worked on by other teams in their own environments. This sort of oversight makes it so much easier to project manage complex customer service issues.

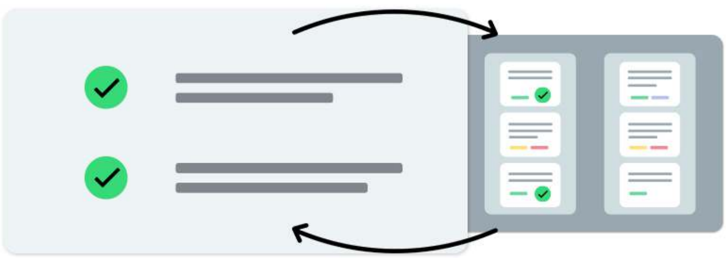
How Unito works:



Firstly, select two project management tools that you want to sync together.



Secondly, use Unito to connect the accounts for both tools to start setting up syncs.



Finally, add your filters to sync tasks and set up mappings based on the way you work to make managing tasks easier.

Define
Plan
Manage
Deliver

Automation, synchronization, tracking, and communication are essential for a healthy customer service workflow.

Tips and tricks

Listen, there's no shortage of customer service tips and tricks lists online. The majority of them overlap significantly, with helpful tips like:

Respond quickly!

Listen to your customers!

Communicate clearly!

Show them you care!

All of these are great tips of course, but they're also tips you probably heard on your first day working at the mall when you were 16. If you're really committed to improving your customer service team through the lens of project management, here are four tips and tricks we think could actually change your team for the better.

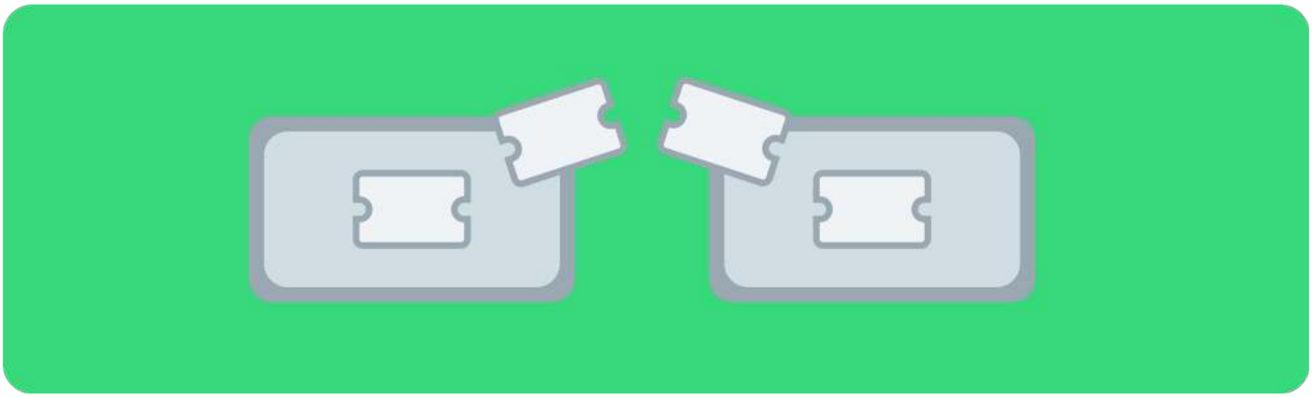
1. Extend skills-based routing beyond the customer service team

Skills-based routing is a fairly common strategy among customer service teams. Essentially it involves sending customer questions and issues to specific agents based on their expertise or skill set. Doing so increases the likelihood of an effective fix and a quicker turn-around on tickets. Most customer service tools, including the three discussed above, allow you to set routing rules to determine who gets what ticket.

But what happens when an issue extends beyond the skillset of your customer service team? Maybe you have a system in place for pushing tickets to the development or marketing teams, which is skill-based routing in its broadest form. Leaving it at that, though, means someone on each of those teams probably needs to spend time diving into the issue themselves before they can make a decision on who to delegate the issue to.

Eliminate this extra step and speed up your workflow by extending skills-based routing beyond your customer service team. If you commonly encounter development issues, know which developer is in charge of the app, who is an absolute pro when it comes to billing bugs, and who is a website wizard. Map out the expertise of your collaborators across the organization. Then, when it comes time to bring in another team to work on your ticket, @ mention the person you know is most likely to help you solve the problem. This should save both teams some much-appreciated time and effort, and really strengthen the "planning and scoping the solution" stage of your project.

2. Institutionalize and sync your workflows



Most customer service teams have standard workflows… to an extent. You've probably established what happens when a ticket comes in, how it ends up in front of an agent, and where they can find the right information to get it closed. You may also have flagged what issues or situations need to be escalated, which is really important.

Now if you already have this sort of workflow in place and you're still scrambling to close tickets or hit KPIs, it may be time to look at giving them a bit of a refresher.

As described with skills-based routing, a common gap in customer service workflows is that they only consider the customer service team. So a workflow might say "Send ticket to dev team" and then "Provide development solution to client," while leaving out everything that happens in between. Suddenly you lose track of who is working on your ticket, what progress has been made, and when you can expect a solution — slowing you down and interrupting your workflow.

To avoid this, try institutionalizing your workflows, expanding your processes to include what happens outside of customer service. In the situation above, assuming you used Unito, your workflow might look something like this:

- Flag ticket as urgent if solution is required within 24 hours
- Sync ticket to dev team customer service board in Jira

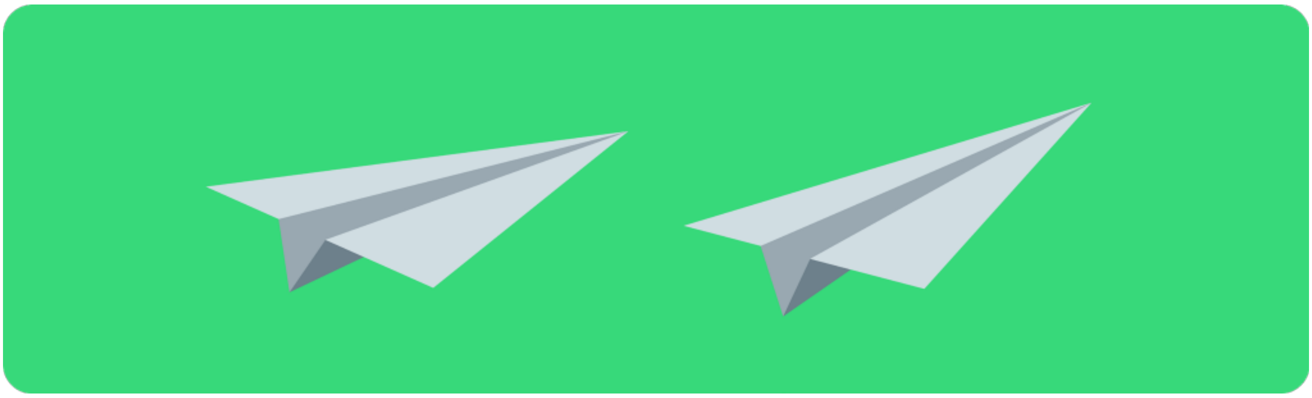
- Once ticket is assigned, leave a comment asking if the developer requires more information
- After 24 hours, request ETA in ticket comment section
- Once solution is received from dev, provide to client
- Remove “urgent” tag and replace with “pending client approval” tag
- Once you have client approval, close ticket so task is closed in Jira

Most customer service workflows incorporate some form of automation to help speed up the process, like tickets being automatically assigned to an agent based on the channel they came in through, or the product they reference. But you can also get more strategic in your automation through syncs.

Again, using the above example, you could have a system in place where any ticket marked as urgent is synced to an urgent developer board immediately. In other situations, you may want all tickets that aren’t closed in 48 hours to automatically end up in Trello board called “weekly team review,” so you can go over what went wrong.

There are a ton of ways to strategically use sync as you improve your customer service workflows. Combined with some institutionalizing of processes, and you’ll be surprised at how drastically you improve the third stage of project management, “managing delivery.”

3. Follow-up on complex customer issues after you've solved them



It's okay, you can pick up your jaw. For many of you, this idea will run counter to everything your customer service team holds dear. Find solution, close ticket, on to the next. But follow-ups can make a huge impact on team performance.

Because of the pressures put on customer service times to move fast and hit quotas, the "monitoring" stage of a project is largely ignored, or pushed off to customer success teams. Ask yourself, though, how many times that same user has come back because the issue reoccurred? Or how many times you've encountered that same problem with another user, only to realize that the issue is more widespread than just one client?

The vast majority of your tickets are probably very simple issues you tackle every single day, and those you should simply solve and close. But for the fraction of tickets that require a new solution, the involvement of another team, or a lengthy period of resolution, you should absolutely follow-up with the client. After a few days or a week, check in to see:

- Is the issue still solved or have they run into any more problems?
- How did they find the resolution process?

If the first question is answered with a "yes," log that solution for future users who might run into the same problem. If you get a "no," you've managed to preempt a complaint or a new ticket, while showing the customer that they aren't just a number on a list, and their experience matters to you.

The second question can provide your customer service team with valuable insights into where your process is lacking. Did the client feel like they were kept informed throughout the process? Were they satisfied with the explanation of the issue and the resolution, or were they just confused? Did they find the turnaround time reasonable? All of these questions can drive team improvement. Another easy way to foster constant learning and improvement?

4. Do internal 'project' retrospectives

This is essentially the internal version of a follow-up, and is often ignored by customer service teams for the exact same reasons. The idea that you'll spend time as a team talking about tickets and issues that you've already closed seems insane to some organizations. Hear us out: retrospectives will save you time in the long run.

This really goes back to the question of "How can you build processes for long-term efficiency?" The answer is by identifying your pain points and spending time in the short term to identify how you won't waste time in the long term. If you're looking at your customer service team's KPIs, just consider that an hour spent today learning from a closed ticket might save your team six or eight hours this quarter.

Retrospectives were popularized by Agile because they really promote continuous learning and adaptation. Essentially they involve providing the time (about 30 minutes) and space (somewhere free from judgement) your team needs to talk about what went well and what needs improvement, as well as next steps.

Customer follow-ups will help you supplement your team's feedback when you cover the good and the bad. And identifying what needs improvement will flow naturally into next steps — arguably the most important part of this process, as it's these steps that will save you time and effort down the road.

This entire retrospective process turns the fifth stage of a project, the wrap-up phase, into something with inherent value as opposed to a checkmark in a box. It also feeds into the first stage of future projects, by proactively "defining the problem" your users might face.

Practice Into Action

The integration of best practices, tools, and tips and tricks is the key to successful real-world implementations.

Use cases

So you've discovered how project management can help your customer service teams, the tools that will support those efforts, and some tips and tricks on how to help your team excel. Now we're going to show you how to implement what you've learned in real customer service situations.

These situations are:

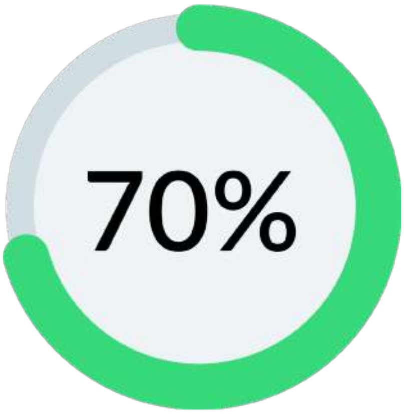
- Building your internal knowledge base
- Escalating legal issues
- Identifying product needs and opportunities

Building a strong knowledge base

Most customer service teams rely on some sort of centralized, internal document in order to answer customer tickets. These documents list out in detail the issue and how to solve it. After all, the information trapped away in your brain isn't all that helpful for onboarding new agents or scaling your customer service team as your organization grows.

Then there are external knowledge bases, essentially repositories of your most frequent tickets, questions, and requests that customers can search through for solutions to their problems. You shouldn't underestimate the value of external knowledge bases; Self-serve issue resolution is the holy grail of customer service after all.

So how do you build a knowledge base? If you're starting from scratch, this can feel like a weighty project that's going to take quite a bit of time away from your day-to-day work. But if you approach it with project management in mind, you can actually integrate knowledge base creation into your team's workflow.



of consumers have made an additional purchase from a company after a positive customer service experience.

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First, identify what needs to be added to the knowledge base. If you're truly starting from zero, this will be everything, so you'll want to log all issues as they happen. But if you've already got a document started and you want to just keep it fresh as you grow, you'll need to set a standard for what gets added to the knowledge base. This can be as simple as "anything not already in it," or it might need more qualifiers, like the numbers of customers it could impact or the simplicity or complexity of the solution, for example.

Once you've determined what gets added to the knowledge base, find a way to integrate it into the customer service workflow. If your organization uses a project management tool like Trello or Asana, you could create a project called "Add to Knowledge Base." When an agent encounters a worthy situation, they could simply sync the ticket from Zendesk or Jira Service Desk to that project, where a new task will be created.

All the information, including the eventual solution, would be present in the task. Then, on a slow day, you can have your team dive into the project and work on updating the knowledge base. You might even add a second board called “Add to External Knowledge Base,” if you want to distinguish between self-serve situations and complex issues requiring support involvement.

Knowing that your agents will be creating these knowledge base articles, you may want to add a step to your workflow asking them to take screenshots as they work on unique or newly-encountered issues. Great knowledge bases combine visual and text elements, making it easier for internal and external users to understand.

Once the new workflow is rolled out, make sure you check in to make sure it’s running smoothly and that your team and customers are benefitting from the work. This will likely involve a dive into your KPIs down the line.

This solution integrates the tools we discussed, and involves two of our customer service tips and ticks. If you were to break down this knowledge base challenge as a project, it might look like this:

Defining the problem:
We need a knowledge base to help scale our CS team.

Planning and scoping the solution:
Instead of trying to tackle it as a separate project, we’re going to integrate it into our customer service workflow.

Managing Delivery:
We’ve set a standard for what needs to be added, and have added two steps to the CS workflow. The first is to send Zendesk tickets that meet the threshold to the knowledge base project in Asana using Unito. The second is to capture visuals from those issues and attach them to the ticket.

Launching and monitoring the project:
The team has been brought up to speed on this new workflow. On days when the team has free time, I'll assign knowledge base work to agents.

Wrapping it up:
We'll see how this works for the next month, and then do a 20-minute retrospective to talk about what needs improvement and next steps.

Escalating financial or legal issues

A customer claims they were billed way too much for your service, except you have their signed agreement stating the opposite. They demand a refund. Heck, maybe they even threaten legal action.

This situation is serious… probably too serious to expect you or one of your agents to handle on their own. When a ticket hits the fan, how do you involve senior members of the organization or your legal department?

Start by establishing what requires escalation, so your team members know exactly when to hit the big red button. Then, tie each of those issues to specific managers and executives — another example of extending skills-based routing beyond the customer service team. Now that you've mapped out the issues requiring escalation and who to turn to for help or approval, build out your project workflow.

Reach out to those managers and let them know that serious situations requiring their involvement are now going to be route to their project management tools as a task. Then create tags in Zendesk like "Escalated Ticket - billing" or "Escalated Ticket - legal." Set up Unito to automatically sync any tickets with those tags from Zendesk to the project management tool used by your senior team members. Now, establish your process.

When a ticket hits the threshold for escalation, append one of the prebuilt tags. Unito will automatically sync it as a task for the executive. They'll have all of the background information from the ticket, including comments left by your agents. Because this is a two-way sync, they can interact with your team directly through the task comments if more detail is needed or to share their thoughts. Once the executive has provided direction on how to proceed, the agent can resolve the issue with the customer, and close the ticket (or maybe push it into a folder for retrospectives?).

How does project management change the game in this situation? Among other things, you've saved your organization from time spent deciding what is worthy of escalation and how to inform. You've also eliminated channel confusion (Zendesk? Email? Phone?) by relying on tools you already use to funnel information and communicate. And you've created a reference by which both your team and the senior team can follow progress on a serious situation, so nothing gets lost in the chaos. Looking at the phases of project management, this situation can be broken down into:

Defining the problem:
Establishing what situations require escalation in advance, and then correctly identifying and tagging those tickets.

Planning and scoping the solution:
Knowing in advance who to escalate the issue to, and relying on them to provide direction on how to proceed.

Managing Delivery:
The agent taking that direction and continuing communication with the customer.

Launching and monitoring the project:
Members of both the customer service and senior teams staying up to date on the progress of the ticket through the tools they already use.

Wrapping it up:
Closing the ticket (which closes the task as well) and then funneling it into a folder for a retrospective if warranted.

Identifying product needs and opportunities

What if your customer service team could affect more than retention? What if you could also help increase sales or grow your user base? While it may not be your team's raison d'etre, contributing to the bottom line in such an impactful way is an opportunity you don't want to ignore. The best part? You won't actually be managing these projects.

The key is finding ways to have this impact without drastically changing your team's workflow or saddling them with a ton of work they don't have time for. Good news: this really isn't all that hard to do using the customer service tools in your arsenal.

Ask your customer service teams to pay attention to complaints from customers about missing services, features, or functionality. If this is something that happens fairly regularly at your business, consider building a tag within Zendesk or Jira Service Desk called "Business Opportunities." Set up Unito to feed those business opportunities to a board in the project management tool of your product or development teams. Then, when your agents are asked about something that doesn't exist, or are being yelled at because "you should clearly have this other feature!" they can just add the tag and your product team will have a fresh set of ideas they know customers are asking for. You don't even have to worry about doubling up on feature requests — volume is a clear indicator of demand.

With minimal effort you've suddenly created a customer service product idea pipeline requiring no surveys, emails, or any additional client reach out. Not too shabby.

From a project standpoint, the phases will look like:

Defining the problem:
Establishing what situations require escalation in advance, and then correctly identifying and tagging those tickets.

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Key things to take away

Congratulations! You've either made it through the guide, or saw that you could skip ahead and just read a simple summary! Either way, here's a quick list of high-level takeaways you'll want to keep in mind as you start integrating customer service into your project management strategy.

PROJECT MANAGEMENT METHODS

Traditional project management methods aren't suited to customer service because they ignored the scale and urgency of CS work. But project management still presents a major opportunity to:

- Prepare for the unknown
- Build in processes for efficiency

TOOLS

Three great customer service tools are:

- Zendesk
- HubSpot Service Hub
- Jira Service Desk

Unito allows you to connect Zendesk and Jira to other project management tools to unlock collaboration and more easily tackle those two opportunities listed above.

TIPS AND TRICKS

- Extend skills-based routing beyond the customer service team
- Institutionalize and sync your workflows
- Follow-up on complex customer issues after you've solved them
- Do internal "project" retrospectives

USE CASES

Project management can be a huge asset to customer service teams when it comes to:

- Building your internal knowledge base
- Escalating legal issues
- Identifying product needs and opportunities

unito

Unito can help you keep customers happy.

Sign up for your two week free trial today