



Service Description

The SaaSy People offers expert consulting and implementation services to help businesses optimise their use of the Zendesk Suite for their operations. Our services include:

- **Zendesk Setup & Configuration:** We align Zendesk settings with your workflows, channels, and business rules. This includes ticket fields, triggers, automations, macros, and more.
- **Integration Expertise:** We connect Zendesk to your CRM, telephony systems, and other relevant tools to create a centralised view of customer interactions.
- **Customization & Development:** Tailored solutions using Zendesk APIs and Apps to extend functionality and match unique processes.
- **Best Practices & Training:** We train your team on effectively using Zendesk features and provide guidance aligned with best practices.

Technical Requirements

- **Client-side:**
 - A modern web browser for access to Zendesk
 - Stable internet connection
- **The SaaSy People's Responsibility:**
 - Access to client's Zendesk account with administrative permissions

Data Backup, Restore, & Disaster Recovery

- **Zendesk's Responsibility:** As the SaaS provider, Zendesk handles data backups, redundancy, and disaster recovery. Refer to their documentation for specific policies (<https://support.zendesk.com/hc/en-us>).
- **The SaaSy People's Responsibility:**
 - **Configuration Exports:** Before major customizations, we'll export backups for safekeeping.
 - **Guidance:** We'll provide advice on how to leverage Zendesk's native backup/restore functionality.

Onboarding & Offboarding

- **Onboarding**
 - **Discovery:** Assess current processes, pain points, and Zendesk experience.

- **Planning:** Create a detailed implementation roadmap, including timeline and milestones.
- **Execution:** Phased implementation of configuration, integrations, and data migration.
- **Training:** User and admin training sessions.
- **Offboarding**
 - **Documentation:** Comprehensive guides on all customizations and integrations.
 - **Knowledge Transfer:** Final session for client admins or IT teams.
 - **Availability:** Limited post-offboarding support (e.g., 30 days)

Service Constraints

- **Maintenance Windows:** Major changes may be scheduled to minimise disruption.
- **Customization Limits:** We'll adhere to Zendesk API limits and best practices. We'll advise if requests are not feasible within the platform.

Service Levels

- **Availability:** Consulting services available Monday to Friday, 8am to 10pm GMT.
- **Support Hours:** Email, phone and live chat support provided during business hours, with a target initial response time of 24 hours.
- **Performance:** Zendesk performance is tied to the platform itself. We'll optimize configurations for the best possible experience.

After Sales Support

- **Check-ins:** Post-implementation follow-up to address issues and satisfaction.
- **Additional Services:** Available for ongoing needs on an hourly or retainer basis.

Outage & Maintenance Management

- **Zendesk Outages:** We will share Zendesk's status page with clients
- **Client-side Outages:** Limited troubleshooting of client-specific network issues upon request.

Hosting Options & Locations

- Zendesk is a cloud-based SaaS. Data is hosted in their secure data centers (refer to Zendesk documentation for locations).

Access to Data (Upon Exit)

- Client retains full ownership of their Zendesk data. Exports can be generated at any time upon request.

Security

- We adhere to Zendesk's security best practices. Sensitive client data will not be accessed or stored outside the Zendesk platform.