

CASE STUDY

CLICKFUNNELS IS A SAAS PLATFORM THAT PROVIDES BUSINESSES WITH TOOLS TO MARKET, SELL, AND DELIVER PRODUCTS AND SERVICES ONLINE.



ABOUT CLICK FUNNELS

ClickFunnels is an end-to-end SaaS company that helps businesses market, sell, and deliver their products, providing solutions for everything from websites and membership tools to online stores and CRM software. As more customers discovered ClickFunnels, the company rolled out a new version of its platform, ClickFunnels 2.0, which used Intercom for customer support. Unfortunately, the original ClickFunnels platform still used the legacy solution Zendesk, confusing both agents and customers.

The parallel systems meant agents often needed to transition tickets between the two platforms, Zendesk and Intercom. Each system had its own customer service team and technical support team, forcing ClickFunnels to manage four separate teams. Even worse, various issues plagued both products, from inconsistent notifications for customers to difficulty creating automations. Productivity plunged as agents constantly switched between screens and platforms with less-than-satisfied customers waiting for mounting agent workloads to dwindle before receiving responses.

ClickFunnels turned to Freshworks to replace both Zendesk and Intercom, migrating more than 21 million records to Freshdesk Omni. With Freshworks, ClickFunnels unified its customer service operations into an all-in-one solution. Now, the company harnesses the combined power of four teams into two teams—customer service and technical support—reducing staffing needs while maintaining speedy first reply times and excellent customer satisfaction (CSAT) scores.



THE CHALLENGE

For years, ClickFunnels customers used the company's original platform to support their marketing needs, supported by Zendesk. But in 2021, the company rolled out ClickFunnels 2.0, an updated platform built to respond to a changing post-pandemic digital marketing environment. With the new product, however, ClickFunnels implemented a separate support system built on Intercom, not Zendesk. This bifurcated the support team, with some using Zendesk and the rest using Intercom, each with its own technical team. When tickets needed to be moved to a different department—or if a customer used both the original and 2.0 versions of ClickFunnels—communications and records became jumbled.

The two-system setup confused employees and led to unhappy customers. Agents often had to close tickets and reopen them on another platform, increasing first reply and resolution times. All this extra work decreased agent efficiency, and lost tickets sent CSAT scores plummeting. The dual customer support system approach was costly, confusing, and required more maintenance.

"It was obviously hard and not very efficient or cost-effective," says Desi Slancheva, ClickFunnels' director of customer experience.

As the business grew, ClickFunnels tried solving its customer service problems by customizing the existing two-solution setup. Despite a longstanding relationship with Zendesk, the platform had always been inflexible and unable to meet ClickFunnels' evolving needs. Analytics were difficult to come by, and automations required significant work from the development team to implement. With Intercom, a confusing notification system frustrated customers and led to missed messages.

Fed up with the disjointed setup and eager to stanch plummeting customer dissatisfaction, ClickFunnels sought a single solution that could handle all of its customer service needs while improving efficiency and reducing friction between agents and customers.



THE SOLUTION

ClickFunnels replaced Zendesk and Intercom with Freshdesk Omni, built on Neo Platform and powered by AWS. The new solution offered an all-in-one omnichannel solution, providing everything agents needed in a single place—with no more screen switching—so they could respond to any ticket faster, regardless of which product customers used.

Freshworks' powerful ticketing and conversational support meant all customers—both the original ClickFunnels product and ClickFunnels 2.0—could use their preferred channel and all of their queries would be routed to the same place. Freshdesk Omni keeps track of tickets so agents can see each customer's history and pass relevant information on to other teams.

ClickFunnels also invested in Freddy AI Copilot, an AI-powered assistant, to improve agent productivity and efficiency with real-time coaching and guidance. Freddy AI Copilot features like Email Reply Generator and Tone Enhancer ease agents' workloads by speeding up reply times and improving interactions with customers. Additionally, AI chatbots from Freddy AI Agent help resolve queries, freeing up agents to work on more complex issues while giving customers satisfying answers to their questions.

The ease of creating automations in Freshdesk Omni was another draw. With just a few clicks, the ClickFunnels team turned many of its manual tasks into automated processes. "It's easy to set up automations in Freshworks—and the impact on our team's efficiency is incredible," says Keith Christensen, customer experience operations senior manager at ClickFunnels.

With more than 100,000 businesses as clients, migrating ClickFunnels' records was a major undertaking. Faye focused on creating a custom scripting process for the efficient migration of 21 million records, ensuring a smooth transition with no downtime and minimal impact on Click Funnels' customers. "It was an easy transition," Slancheva says.

Additionally, Faye helped design a streamlined agent experience with centralized KPIs, reduced agent clicks, and more automations to improve efficiency and ease the transition from Zendesk and Intercom without disrupting ClickFunnels' business.

ClickFunnels is a SaaS platform that equips businesses and entrepreneurs with tools to market, sell, and deliver products and services online. Based in Eagle, Idaho, the 500-person company boasts more than 100,000 business customers.



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Desi Slancheva

Director of Customer Experience



RESULTS

With Freshworks' unified customer service solution, ClickFunnels brought together operations across its teams and offered customers their choice of support channels. This combined solution led to improved efficiency and productivity, which allowed ClickFunnels to streamline operations while maintaining customer satisfaction.

Freddy AI Copilot's Tone Enhancer helps agents who speak English as a second language to work more quickly by refining written text to match the context of the conversation. Tone Enhancer has allowed ClickFunnels live chat to maintain an average first reply time of 1-2 minutes and a resolution time of less than half an hour, even with fewer agents.

Customers are happier, too. ClickFunnels' customers are finding answers faster than ever before, reflected in its 95% CSAT score. "We were able to unify our support teams and still maintain the same metrics. When it comes to streamlining operations, that's the ideal situation," says Slancheva.

