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Asynchronous Messaging: The Next Digital Disruptor IT Leaders Must Harness For Differentiated Customer Experience

FEATURING RESEARCH FROM FORRESTER

The Case For Asynchronous Messaging:
Apple Business Chat, Messenger, WhatsApp

Customers today demand support where and when they choose, leading to the rise of asynchronous messaging channels, like social media. And IT leaders are at the forefront of enabling businesses to react to these new customer behaviors. Which means ensuring you have the right platform and technologies in place for scale, agility, and innovation—empowering great customer and employee experiences.

THE RISE OF MESSAGING IN CX

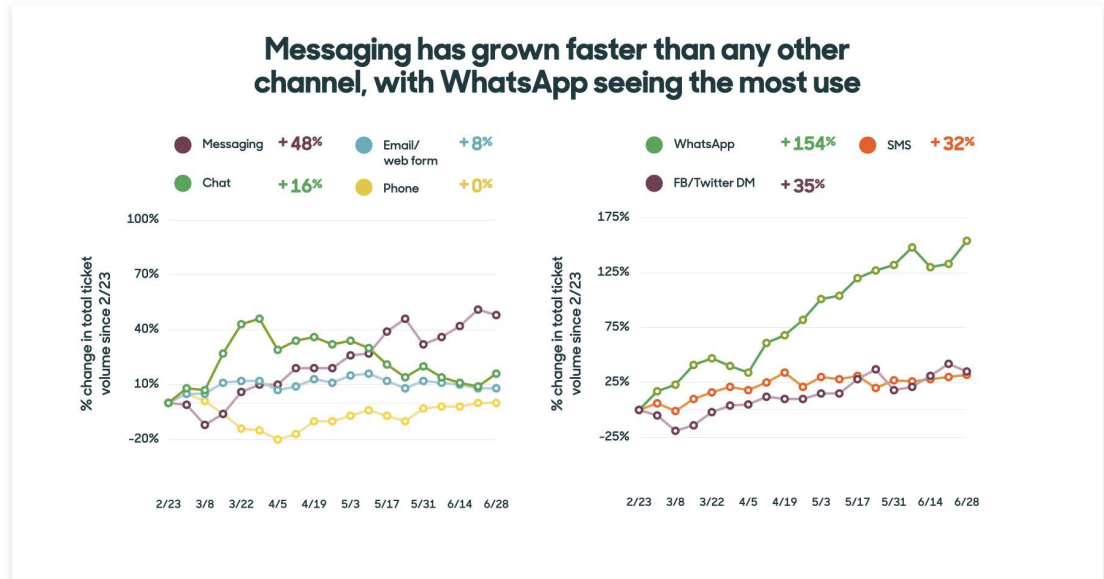
For IT leaders, providing ways to react to new customer behaviors and business needs is crucial. The impacts of COVID-19 have dramatically accelerated the need for businesses to support more communication channels for their customers, while also making it easy for a distributed workforce to manage these conversations. Every customer interaction today is part of a continuous conversation, with customers demanding support where and when they choose. Live chat is necessary for real-time conversations, but customers today also want to be able to reach out via always-on asynchronous channels, like social messaging, with no expectation of an immediate response—they can start or continue the conversation when it's convenient for them, even if it's outside of normal support hours.

Since the onset of the pandemic, support requests have increased 24% globally¹ compared to last year, with customers experiencing longer than usual wait times across traditional phone and email support. In response, consumers have flocked to asynchronous messaging channels like WhatsApp, FB Messenger, Twitter and SMS—which have experienced a combined 48% increase in tickets. WhatsApp alone saw usage jump by more than 154% during that same time period. What normally might have been a months-long or even year-long transformation effort has forced businesses to pivot in a matter of weeks to keep up with customer expectations. And this trend is here to stay—investing now in asynchronous messaging is non-negotiable.

1. Zendesk, [Home-bound customers turn to messaging channels](#)

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MESSAGING IS WHERE YOUR FOCUS NEEDS TO BE

Offering customers more asynchronous messaging channels is just one piece of a successful CX strategy. Your support teams also need to be able to efficiently manage these new conversations with tags, automations, workflows, and triggers, as well as have access to every customer interaction, across any channel, all in one unified workspace. By embracing an end-to-end messaging platform like Zendesk, businesses can:

- Give agents 15-30% of their time back with one unified conversational view across all channels, arming agents with the right context, and enabling them to handle more simultaneous chat streams²
- Gain visibility into key CX insights to understand customer trends, get ahead of emerging issues, and identify areas for improvement
- Decrease costs by as much as 80%, deflecting tickets to less expensive messaging channels³, and improving efficiencies by offering self-service with chatbots and AI
- Take it a step further, embedding rich and interactive conversational experiences into their customer touchpoints, increasing overall CSAT and brand loyalty

2. Forrester Research, *The Case for Asynchronous Messaging: Apple Business Chat, Facebook Messenger, WhatsApp*, Ian Jacobs and Julie Ask, 23 July 2020

3. Execs in the Know, *Chat vs. Messaging for Customer Support: Why Messaging Wins*

HOW IT LEADERS CAN FUTURE-PROOF THEIR CX WITH ZENDESK

IT leaders are at the forefront of enabling exceptional customer and employee experiences for their business, while keeping operational costs low, often with limited resources. With Zendesk's end-to-end messaging platform, IT leaders can help future-proof their CX strategy with:

- A secure, open and flexible platform – designed for scale and innovation – where your developers can build once and deploy on every channel
- Fast time to value with easy to use and out-of-the-box solutions
- An easily extensible solution, allowing you to integrate bots, AI, and third-party applications to deliver a single view of the customer conversation
- Easily integrate and consolidate your existing technology stack, leveraging current investments, reducing support costs, and utilizing the right tools for the right job

IT leaders need to invest in asynchronous messaging channels to catch up to changing customer behaviors today, while setting support teams up for success in the immediate future with the agility to cost-efficiently handle an influx of requests. Be the driver of your digital-first strategy to deliver CX that empowers your agents, amazes your customers, and allows your IT teams to focus on only the most critical tasks at hand.

In the following report, learn why we believe Zendesk can be the platform to enable you to move with the agility and speed that businesses and customers demand.

The Case For Asynchronous Messaging: Apple Business Chat, Messenger, WhatsApp

Just Supporting Web And Mobile Chat Is A Missed Opportunity

by Ian Jacobs and Julie Ask

July 23, 2020 | Updated: July 27, 2020

Why Read This Report

Consumers love messaging, at least when it comes to keeping in touch with friends and family. But brands have lagged in offering asynchronous messaging conversations with their customers. This report examines the ways that brands currently use asynchronous messaging and shows customer service leaders what they need to do to make this communication channel a customer favorite.

Key Takeaways

To Engage Customers In Messaging, Brands Must Overcome Numerous Hurdles

Despite widespread consumer adoption, firms struggle to embrace asynchronous messaging. Brands cite budgetary and bandwidth constraints as well as concerns around privacy as some of the factors keeping them from diving head-first into messaging.

Invest In A Unified Desktop To Capitalize On Existing Investments

As consumers' interaction preferences shift, a single agent desktop will become critical to scaling existing channels and supporting emerging ones. Early investment will optimize the agent and customer experience.

The Case For Asynchronous Messaging: Apple Business Chat, Messenger, WhatsApp

Just Supporting Web And Mobile Chat Is A Missed Opportunity

by [Ian Jacobs](#) and [Julie Ask](#)

with [Daniel Hong](#), [Erin Sellers](#), [Caleb Ewald](#), Hailey Colin, and Rachel Birrell

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[Consumers Want Convenience, Not
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[The Second Coming Of Digital-First Customer
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Don't Make Your Customers Find You To Chat: Go Find Them

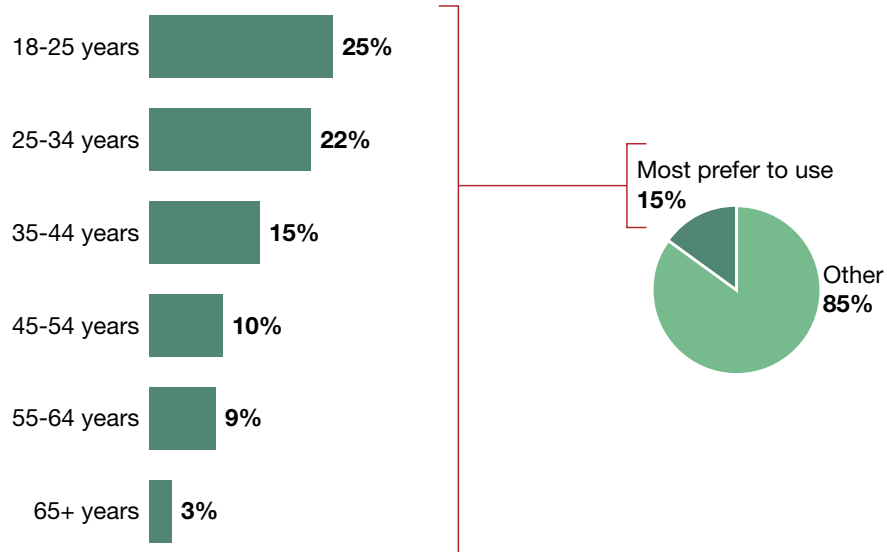
Consumers are using web and mobile chat to communicate with brands, but too few brands meet customers where they are: third-party platforms in asynchronous environments. While 69% of US online adults use messaging to communicate with family and friends daily, just 41% do so with brands.¹ On the flip side, 37% of firms we surveyed use chat on their own mobile website or app (i.e., synchronous messaging), but only 19% use asynchronous messaging on third-party platforms.²

- › **Consumers embrace asynchronous messaging.** Life is busy and full of interruptions and multitasking. Many consumers have embraced asynchronous communication with brands because it fits into their day and allows them to communicate when and where they choose (see Figure 1). Third-party and OS-based chat services support billions of consumers daily. The popularity of these services originated outside the US, but even US online adults have now adopted them (see Figure 2).
- › **Firms rely more on synchronous chat than on asynchronous messaging.** Asynchronous messaging, to a certain extent, has been shown to be more cost efficient for enterprises than chat: Sparkcentral found that agents were 15% to 30% more productive with messaging versus live chat.³ Consumers may start a conversation and then seemingly abandon that conversation because they get distracted, run out of time, realize they are missing information, or are multitasking and need to switch tasks. These chat sessions are challenging because consumers expect instant responses and persistent context (e.g., account status, why they need help), but customer service centers are not staffed or set up for long periods of dormancy. Agents pick up new conversations; shifts change.
- › **If firms do offer asynchronous messaging, they do so with limitations.** The synchronous implementations that we observed on Messenger involved a bot doing one of two things: 1) offering auto replies to set customer expectations of when they could expect a reply or 2) providing multiple-choice options for a self-guided tour. Most of these ultimately served as a search mechanism for web pages. The exception was Apple, which offered customer support through its Apple Business Chat platform — if you can call that a third party. In the hotel category, which was staffed exclusively by humans 16 out of 24 times, the chat had the feel of email.⁴

FIGURE 1 Consumers Of All Ages Prefer Using Chat To Talk With Brands For Customer Service

“Which of the following methods would you most prefer to use to communicate with a customer services representative from a company or brand you had purchased from?”

Chat



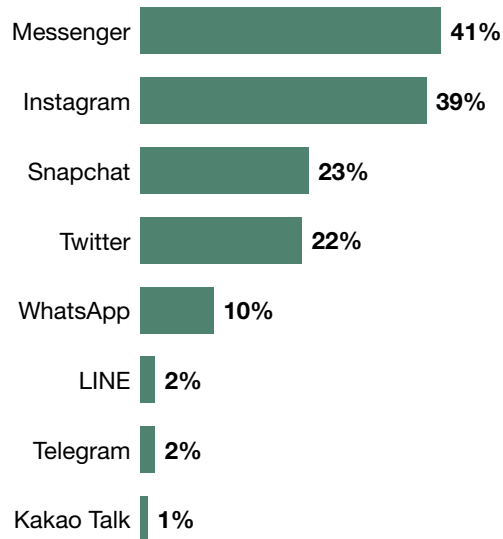
Base: 5,102 US online adults (18+); base sizes vary by age group

Source: Forrester Analytics Consumer Technographics® North American Technology, Media, And Telecom Benchmark Recontact 1 Survey, 2019 (US)

FIGURE 2 US Online Adults Use A Wide Variety Of Social Media/Messaging Platforms

“Which of the following social media or messaging sites or apps do you use at least weekly?”

Third-party



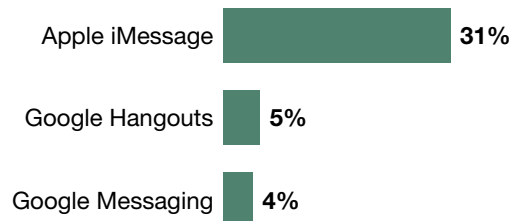
Note: Not all response options are shown.

Base: 142,480 US online adults (18+)

Source: Forrester Analytics Consumer Technographics® Benchmark Survey, Part 1, 2020

“Which of the following social media or messaging sites or apps do you use at least weekly?”

Operating-system-based



Base: 5,102 US online adults (18+)

Source: Forrester Analytics Consumer Technographics® North American Technology, Media, And Telecom Benchmark Recontact 1 Survey, 2019 (US)

ENTERPRISES FAIL TO PUT THE CUSTOMER FIRST IN CHAT AND MESSAGING

Forrester surveyed 188 B2C brands to understand how and why they were using text-based interfaces to engage consumers. Overall, they still primarily rely more on static, self-navigated experiences like apps and websites than on interactive ones like chat, voice, or even notifications (see Figure 3). Among the firms supporting chat, we learned the following:

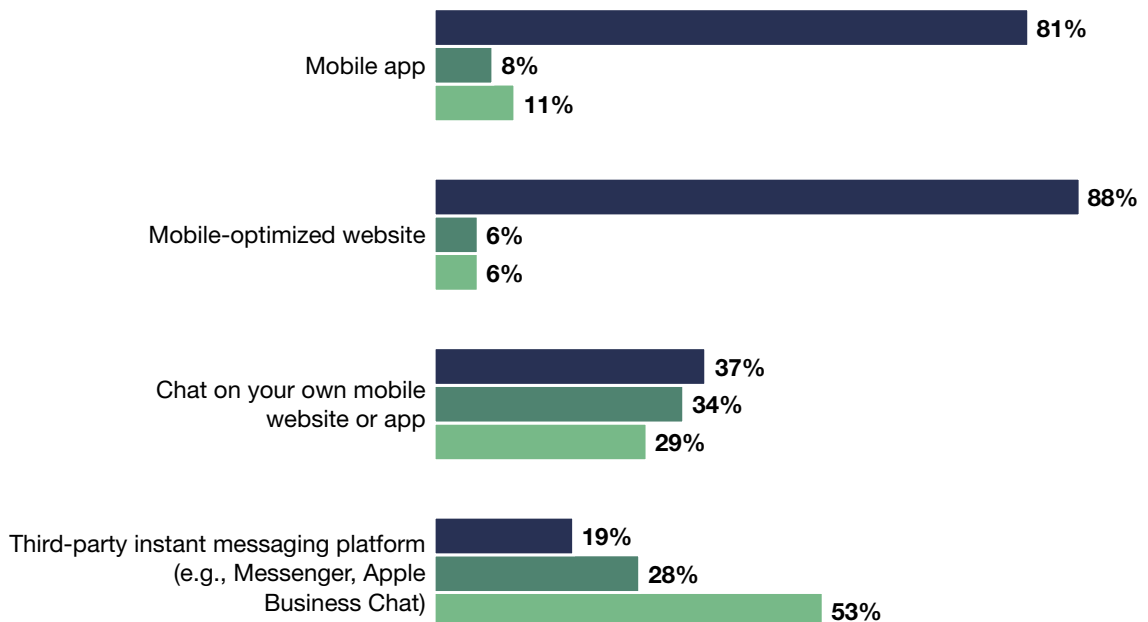
- › **Most chat supports customer service — as it should.** Outside of a few simple use cases like replenishment purchases or ordering transportation, chat lacks the convenience of a graphical user interface for transactions or marketing. Our analysis of B2C brands and our executive survey showed that most implementations support customer service. Of the 188 brands we evaluated, 45 implemented chat in mobile (on both mobile web and/or a mobile app) and all were capable of handling customer service.⁵
- › **Firms rightly focus on improving customer experience (CX) rather than cutting costs.** Too often, firms view mobile or digital experiences as cheaper self-service options rather than as an opportunity to give consumers choice or to improve CX. Among those firms we surveyed that are implementing chat in mobile, only 44% cited cost reduction as a reason while 86% mentioned improving CX (see Figure 4). The current pandemic has put even more pressure on firms to use chat to improve CX and handle increases in inbound volume. Agents can handle more simultaneous chat streams than voice streams.
- › **Budget inhibits the broader placement of chat services on mobile devices . . .** Not all firms we surveyed had implemented chat. When we asked why they hadn't, they cited a lack of budget or the bandwidth to do more with their digital portfolio (see Figure 5). But an implementation of web-based chat can run from less than \$100 per seat (or even be free) on the low end to a few hundred dollars per seat on the high end. Simply migrating a web-based solution to a smaller screen may not add cost, but building a chat solution tailored to the needs and motivations of consumers on the go — including asynchronous options — can.⁶
- › **. . . as do privacy concerns.** Customer privacy and data ownership on third-party sites limits a brand's ability to serve customers in third-party environments like Messenger. Thirty-two percent of US online adults say that they read a company's privacy policy before completing an online transaction or downloading an app.⁷ And nearly half of global security decision makers say that they are highly or extremely concerned with third-party risk in general.⁸ Authentication within a brand's own property — app or web — offers the asynchronous communication that consumers seek with the security they expect.
- › **“Owned” chat deployments outweigh “borrowed” ones.** Given the cost of deployment and privacy concerns, firms are most likely to extend online chat services to mobile devices within their own apps or platforms rather than to support services on third-party platforms: 37% have implemented and 34% are piloting chat on their own properties versus 19% and 28%, respectively, on third-party platforms.⁹ That said, demand for “borrowed experiences” is there once third

parties resolve concerns with their platforms. The significant growth of Messenger, which boasts over 300,000 active bots, highlights this increasing demand. In 2018, the platform saw 8 billion messages exchanged between people and businesses each month, quadruple the year before.¹⁰ Moreover, 58% of global mobility decision makers say that they are actively working on a strategy to engage their customers on third-party apps or platforms.¹¹

FIGURE 3 Brands Have Invested Less In Conversational Interfaces Than In Self-Service

“Which of the following best describes your firm’s state of development of customer experiences for each of the following mobile channels?”

- Use regularly
- Piloting
- Not using or piloting



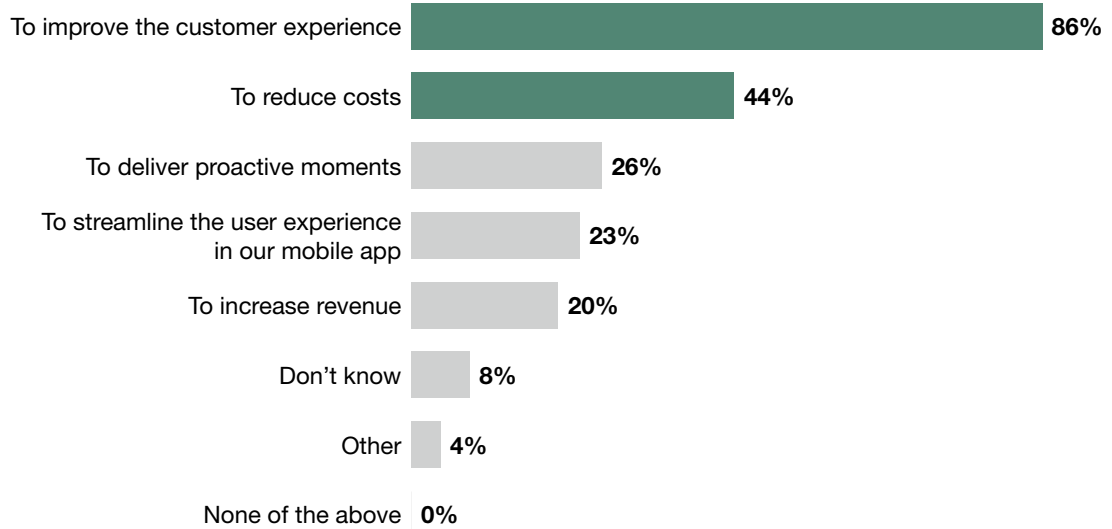
Note: We excluded responses of “Don’t know.”

Base: 145 to 162 digital business executives

Source: Forrester’s Global Emerging Technology Executive Survey (October 2018 to February 2020)

FIGURE 4 Digital Business Executives Focus On Customer Experience Improvement And Cost Reduction**“Why did you decide to build a conversational interface experience?”**

(Select all that apply)



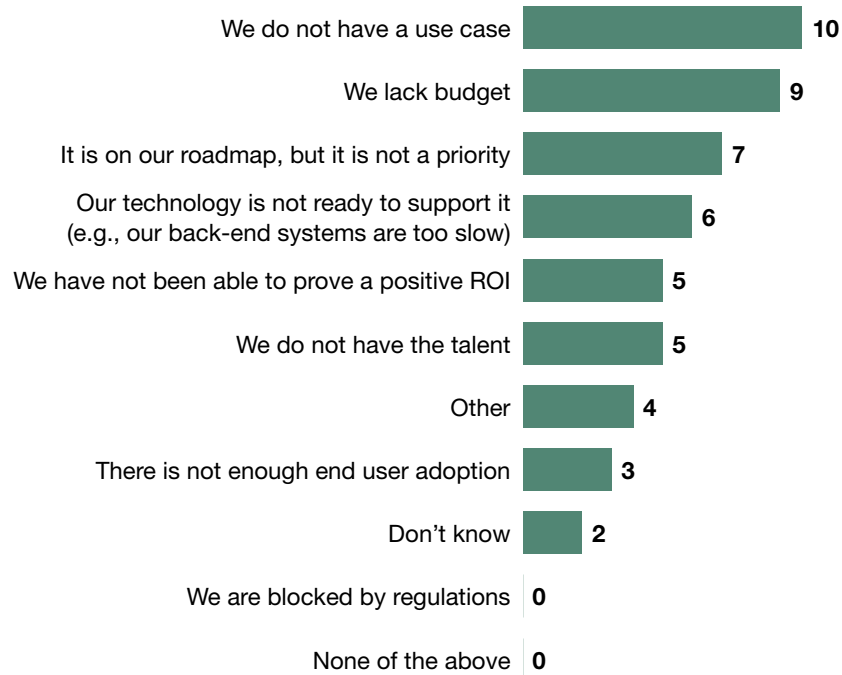
Base: 101 digital business executives who are building a conversational interface

Source: Forrester's Global Emerging Technology Executive SuSvey (October 2018 to February 2020)

FIGURE 5 Lack Of Budget And Bandwidth Impede Brand Adoption Of Chat

“Why are you not using or piloting a conversational interface?”

(Select all that apply)



Base: 26 digital business executives who are not using or piloting chat on their own mobile website or app or a third-party messaging platform

Source Forrester's Global Emerging Technology Executive Survey (October 2018 to February 2020)

Recommendations

Tackle Digital-First Service Holistically

Many factors inhibit brands from initiating conversations with consumers through third-party messaging platforms. Both WhatsApp and Apple Business Chat (ABC) have taken a measured approach to allowing brands on their respective platforms, while platforms like ABC won't let brands initiate conversations with consumers. However, we expect brands to gain permission to engage consumers proactively as adoption of interactive push notifications grows and brands gain consumer trust. To this end, digital business pros should start asynchronous messaging with notifications first:

- › **Consider how notifications will trigger conversations and processes.** Notifications may be standalone in that consumers can read them and get what they need with no further action; examples include appointment reminders, balance alerts, or even deals on products. Going forward, notifications will also initiate conversations. A simple message from Chick-fil-A asks a consumer if she is close to the restaurant after she orders based on her location; if the customer says yes, Chick-fil-A then prepares her food to ensure it is hot when she arrives. Brands must redesign simple transactions to be conversational to fit this new paradigm.
- › **Identify opportunities to borrow moments and launch conversations.** Consumers today may initiate conversations with brands on third-party messaging platforms like ABC and Messenger. Brands borrow these moments from IM platforms. But brands must borrow more moments that allow consumers to chat with them in context or in existing task flows. Consumers, for example, can launch a messaging session on ABC with Apple customer service from the Maps application after searching for a store and local inventory. Opportunities to borrow moments to initiate conversations will become more pervasive — embedded in email, maps, social media, ads, browsers, and more.

More Scale, More Insights, And Better Design Will Help On Multiple Levels

Messaging in one channel is just one part of the picture; brands should invest in a digital-first strategy to enhance CX. To create a successful digital-first approach, digital business pros must:

- › **Use one agent desktop to scale chat and messaging channels.** The customer service channel mix is ever changing as new ones emerge. The challenge is keeping up with this channel sprawl and strategically deciding which to support so that you can effectively engage with customers via their channel of choice. Use one agent desktop tool that provides a single interface that can support myriad chat and asynchronous messaging channels, including single reporting and analytics.¹² Vendors like Helpshift and Zendesk (Smooch) provide this capability.
- › **Invest in interaction and journey data.** The first step to creating a differentiated customer experience is understanding your customers' behaviors and intent. Deep personalization requires the ability to track real-time interactions and customer journey information, areas in which many

vendors are lacking.¹³ However, you need more than just the right tools to collect the data. You need the right strategy to leverage this data to produce the contextualized experience that customers expect. A good starting point is to bring customer data management in-house to mitigate the problems that siloed systems can cause. For example, a study found that respondents are concerned that mismanaged data drives revenue down.¹⁴ Keeping data in-house ensures that you can rapidly generate insights and drive personalized experiences.

- › **Map out digital service journeys that cross channels.** Yes, customers seem to love messaging. But as our research has shown repeatedly, customers gravitate to convenient experiences — and those don't always start or end with asynchronous messaging. Identify the “happy” or “golden” path through your customer service processes for your leading service use cases. Understand where a customer may choose to jump out of messaging into another channel, and then work to remove the friction that causes these jumps.

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Supplemental Material

SURVEY METHODOLOGY

Forrester's Global Emerging Technology Executive Survey is an ongoing survey fielded to executives with knowledge of digital experience initiatives. For quality assurance, we screen respondents to ensure they meet minimum standards in terms of knowledge and insight into their companies' digital experience initiatives. Forrester started the survey in October 2018. Respondent incentives include a summary of the survey results, a custom mobile messaging strategy scorecard, and the opportunity to participate in future research. Exact sample sizes and survey dates are provided in this report on a question-by-question basis. This survey uses a self-selected group of respondents and is therefore not random. This data is not guaranteed to be representative of the population, and, unless otherwise noted, statistical data is intended to be used for descriptive and not inferential purposes. While nonrandom, the survey is still a valuable tool for understanding where users are today and where the industry is headed.

The Forrester Analytics Consumer Technographics® Benchmark Survey, Part 1, 2020, was fielded from November 2019 through February 2020. This online survey included 142,480 respondents in the US and 13,708 respondents in Canada between the ages of 18 and 88. For results based on a randomly chosen sample of this size, there is 95% confidence that the results have a statistical precision of plus or minus 0.3% of what they would be if the entire population of US online adults (defined as those online weekly or more often) had been surveyed and plus or minus 0.8% of what they would be if the entire population of Canadian online adults had been surveyed. Forrester weighted the data by age, gender, income, region, and broadband adoption to demographically represent the US and Canadian online adult populations. The survey sample size, when weighted, was 142,480 in the US and 13,708 in Canada.

The Forrester Analytics Consumer Technographics North American Technology, Media, And Telecom Benchmark Recontact 1 Survey, 2019 (US), was fielded in February 2019 and March 2019. This online survey included 5,114 respondents in the US between the ages of 18 and 88. For results based on a randomly chosen sample of this size, there is 95% confidence that the results have a statistical precision of plus or minus 1.4% of what they would be if the entire population of US online adults (defined as those online weekly or more often) had been surveyed. Forrester weighted the data by age, gender, income, broadband adoption, and region to demographically represent the US online adult population. The survey sample size, when weighted, was 5,114.

(Note: Weighted sample sizes can be different from the actual number of respondents to account for individuals generally underrepresented in online panels.) The programming language herein reflects the survey respondent base for each question. Bases for specific questions have been changed in published data for increased clarity. Therefore, the base in published data may not match the base language in this document. Dynata fielded this survey on behalf of Forrester. Survey respondent incentives included points redeemable for gift certificates.

FORRESTER CHATBOT ANALYSIS METHODOLOGY

Forrester selected and analyzed the top brands in 15 sectors: retail; eCommerce; quick service restaurants; automotive; wireless service providers; internet service providers; travel aggregators; airlines; hotels; banks; credit cards; property and casualty insurance; life insurance; health insurance; and wealth management. Analysis included researching brands' presence on voice assistants (Amazon Echo, Google Home, Cortana) and noting brands' functionality and user interface design on Messenger, mobile web chatbots, and mobile app chatbots.

COMPANIES INTERVIEWED FOR THIS REPORT

We would like to thank the individuals from the following companies who generously gave their time during the research for this report.

Conversocial

Men's Warehouse

GM Financial

Endnotes

- ¹ Source: Forrester Analytics Consumer Technographics Benchmark Survey, Part 1, 2020.
- ² Source: Forrester's Global Emerging Technology Executive Survey (October 2018 to February 2020).
- ³ Source: "Live Chat," Sparkcentral (<http://sparkcentral.com/old/channels/modern-live-chat/>).
- ⁴ Source: Forrester Chatbot Analysis.
- ⁵ This includes human-to-human chat, pure chatbots, and hybrid chatbots (chatbot and human). Source: Forrester Chatbot Analysis.
- ⁶ See the Forrester report "[Born To Chat.](#)"
- ⁷ Source: Forrester Analytics Consumer Technographics North American Online Benchmark Survey (Part 1), 2019.
- ⁸ Source: Forrester Analytics Global Business Technographics Security Survey, 2019.
- ⁹ Base: 145 to 157 digital business executives. Source: Forrester's Global Emerging Technology Executive Survey (October 2018 to February 2020).
- ¹⁰ Source: "F8 2018: David Marcus' Keynote," Facebook Business, May 1, 2018 (<https://www.facebook.com/business/news/david-marcus-f8-keynote-2018>).
- ¹¹ Source: Forrester Analytics Global Business Technographics Mobility Survey, 2019.
- ¹² See the Forrester report "[The Forrester New Wave™: Digital-First Customer Service Solutions, Q2 2020.](#)"
- ¹³ For more information on the importance of adopting a digital-first strategy, see the Forrester report "[The Second Coming Of Digital-First Customer Service Solutions.](#)"
- ¹⁴ Source: Angel Hollis Vaccaro and John Healy, "Companies Bring Data In-House to Improve CX," The Wall Street Journal, January 14, 2020 (<https://deloitte.wsj.com/cio/2020/01/14/companies-bring-data-in-house-to-improve-cx/>).

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