

CUSTOMER SUPPORT TICKET ANALYSIS TEMPLATE

Purpose: This template helps you systematically analyze customer support tickets to identify recurring pain points, service gaps, and opportunities for improving the customer experience. By tracking common issues, you can proactively address concerns, enhance product/service quality, and reduce support requests.

How to Use This Worksheet:

**Refer to the example below for guidance.*

1. Gather a dataset of recent customer support tickets from your help desk, CRM, or email support system.
2. Categorize each issue based on recurring themes (e.g., technical issues, billing, product confusion).
3. Identify patterns and prioritize the most common or high-impact concerns.
4. Develop solutions or proactive measures to resolve frequent issues.

CUSTOMER SUPPORT TICKET ANALYSIS TEMPLATE

Step 1: Collect Customer Support Tickets

Start by collecting support tickets from multiple sources:

- Help desk software (e.g., Zendesk, Freshdesk, Intercom)
- Live chat logs and chatbot interactions
- Email support inquiries
- Social media complaints or DMs
- Product reviews and feedback forums

Notes on collected data:

1. _____
2. _____
3. _____

Step 2: Categorize Recurring Issues

Group issues into key categories to identify trends:

- Technical Issues: Errors, bugs, system glitches.
- Billing & Payment: Refund requests, incorrect charges, subscription problems.
- Product/Service Confusion: Customers struggling to use features or understand offerings.
- Customer Experience & Support Quality: Complaints about wait times, service interactions.
- Delivery & Logistics: Late shipments, missing products, order tracking problems.

Categorized issues:

1. _____ (Category: _____)
2. _____ (Category: _____)
3. _____ (Category: _____)

Step 3: Identify Trends & High-Impact Issues

Analyze the categorized data to find the most common and high-impact problems:

- Which issues occur most frequently?
- Which issues lead to customer churn or complaints?

- Are there patterns among specific customer segments?

Key insights from support data:

1. _____
2. _____
3. _____

Step 4: Develop Solutions & Preventative Measures

Based on your findings, create action steps to resolve frequent pain points:

- Self-Help Resources: Add FAQs, knowledge base articles, or tutorial videos to reduce support tickets.
- Product/Service Enhancements: Address common product issues through improvements or updates.
- Customer Service Training: Train support teams to handle frequent concerns efficiently.
- Proactive Messaging: Preemptively inform customers about known issues and solutions.
- Automation & AI: Implement automated responses or chatbots for simple, repetitive queries.

Planned improvements:

1. _____
2. _____
3. _____

EXAMPLE: CUSTOMER SUPPORT TICKET ANALYSIS

Step 1: Data Collection

- 500 support tickets analyzed from Zendesk over 60 days.

Step 2: Categorized Issues

- 35% related to billing errors.
- 25% related to login/password reset issues.
- 20% related to product confusion.

Step 3: Trends & High-Impact Issues

- Billing issues led to the highest number of refund requests and negative reviews.
- Many login issues were caused by outdated password reset instructions.
- Customers were confused about pricing tiers, leading to unnecessary support inquiries.

Step 4: Developed Solutions

- Billing Fix: Simplified invoice layout and improved payment support articles.
- Login Fix: Updated the password reset process and added a troubleshooting guide.
- Product Confusion Fix: Redesigned the pricing page for better clarity and added a comparison chart.