Optimizing Sales Strategies and Leveraging Zendesk for Copenhagen Cycles

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Optimizing Sales Strategies and Leveraging Zendesk

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Report Submitted to:
Ole Kassow
Founder of Cycling Without Age and Copenhagen Cycles

Ciara Kassow
Key Account Manager at Copenhagen Cycles

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Abstract

Customer relationship management (CRM) platforms are useful for consolidating data and managing a client base. This project examined Copenhagen Cycles' CRM strategies and identified changes to improve customer retention during the purchasing process. Our approach highlighted the opportunities to merge different software platforms while also considering the external factors impacting client relations. The results from our work emphasized that a balance between automation and strong customer service is necessary for the operations at Copenhagen Cycles.

Acknowledgement

We would like to thank our sponsors, Ole Kassow and Ciara Kassow, for the opportunity to work with Copenhagen Cycles and Cycling Without Age. They have provided us with guidance, support and a welcoming environment to test our new ideas. We have loved getting to know everyone involved in the CWA operations and the shared lunches every day. We also would like to acknowledge our advisors Professor Hersh and Professor Shockey for the valuable feedback and adaptability to our project. Additionally, we would like to thank Professor Hansen for the continued support and care over the past three terms. We are very appreciative of the Copenhagen Cycles' clients that took the time to speak with us and the CRM professionals who assisted in upgrading every account. Finally, a special thank you to Hotel 9 Små Hjem for a lovely place to stay during our time in Copenhagen.

This work is original to the project authors and study participants and was not generated or assisted using ChatGPT or AI tools.

Authorship

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Meet the Team!

Hi! My name is Olivia Toolin and I am a biomedical engineering student from Bedford, New Hampshire. I am currently pursuing my master's in Management in the BS/MS program at WPI. This project has been an incredible experience fulfilling my interest in business while challenging me to learn more about software integration. Working with Copenhagen Cycles and Cycling Without Age has shown me how passion drives productivity and a connected community. This experience has taught me how to be adaptable during troubleshooting and creative when looking for new avenues to advance a project. I have thoroughly enjoyed my time here and am looking forward to how this experience will impact my career.

Hello! My name is Ani Ladd and I am from Northern California. I am a junior at WPI currently pursuing a degree in Biomedical Engineering with a minor in Mechanical Engineering. This experience has given me the opportunity to learn more about business operations and what it takes to streamline sales at a small company. I have enjoyed working with the team and Copenhagen Cycles and Cycling Without Age and I will forever remember my time spent in Copenhagen! My favorite part about this experience has been learning from all the amazing mentors in the office and getting to ride my bike to work in the morning!

Hey everyone! I'm Agustin Alzate, a third-year student at WPI coming from Medellin, Colombia and Fort Lauderdale, FL. I am pursuing my B.Sc in Industrial Engineering and my M.Sc in Business Analytics. Working with Copenhagen Cycles has been an amazing opportunity for me to turn my technical knowledge into practice. This process has also allowed me to see beyond the ordinary, challenging me to learn that IT operations for organizations involve more than a technological component. The learning curve from this experience has equipped me with a well rounded skill set to tackle a diverse variety of strategic consulting scenarios. I feel grateful to have collaborated with such an amazing team as the one from the Cycling Without Age ecosystem. It has been amazing to understand that purpose and passion are crucial to the success of an organization.

Executive Summary

Figure A: Ole Kassow with 95-year old rider and Telegraph reporter on a CWA bike ride (photo credit: Alzate, 14/03/2024)

Copenhagen Cycles and CWA

The city of Copenhagen has promoted biking as a way of life for individuals of all ages and mobility levels by making cycling more accessible (Denmark.dk, 2018). One of the most important non-profit organizations that has emerged from this movement is Cycling Without Age (CWA). The organization aims to bridge generational gaps and combat loneliness through shared bike rides for the city's elderly using a trishaw, a three-wheel battery-powered vehicle with a carriage in the front. Due to its non-profit status, CWA relies on loans, government funding, grants, and donations. As a solution to these limitations, Copenhagen Cycles was founded to fund the endeavors of CWA using a social economic enterprise business model. This allows Copenhagen Cycles to operate as a for-profit organization while allocating profits from generated sales to the CWA mission. Together, the two entities promote the same values, emphasizing the importance of mobility, cross-generational relationships, and social inclusivity (Copenhagen Cycles, 2022).

Importance of CRM

In order to gain a competitive edge over other organizations, a cohesive IT landscape can offset staffing variability and improve internal operations for a nonprofit (Gratton, 2018). Organizations can use a customer relationship management (CRM) platform to ensure all streams of communications and actions, such as sales, customer support and account management, are connected under one channel. Within the ecosystem of Copenhagen Cycles and CWA, a unified CRM strategy can be important for acquiring, retaining, and improving the management of customers (Blery, et al., 2006). Merged with marketing and operational strategies, a CRM platform can enable nonprofits to not only manage their customer bases but also generate personalized experiences tailored to each individual client. As seen in Figure B, the emphasis on building a personable relationship with a new client motivated Copenhagen Cycles to create a painting for their shipping crate inspired by the chapter's location.

Figure B: Customized painting on trishaw shipping container for client in Alexandria, Minnesota (photo credit: Alzate, 14/03/2024)

Zendesk Sell

Zendesk Sell, a newly developed CRM platform, has been recently integrated within Copenhagen Cycles' operations to improve sales automation (Network Asia, 2018). The platform promises to simplify management processes while emphasizing the importance of customer connections and retention (Zendesk, n.d.). The expectation was that by merging platforms under Zendesk, Copenhagen Cycles' operations would be better organized and more efficient.

The goal of this project was to streamline Copenhagen Cycles' sales using Zendesk to increase customer retention across the purchasing process. To achieve this goal, we completed the following objectives: 1. Assessed the current and potential integration of all CRM platforms to identify areas of improvement; 2. Understood the purchasing process from the customer's perspective; 3. Identified and tested strategies to optimize the sales portal for Copenhagen Cycles. Our aim was to provide a strong foundation for success at Cycling Without Age.

Approach and Findings:

Objective 1:

Extensive archival research was collected to conduct a baseline assessment of the current integration of all CRM platforms. The IT landscape incorporates six platforms: Zendesk Sell, E-conomic, Make, Podio, Tidio, and Mailchimp. After a comprehensive assessment of the software used at Copenhagen Cycles, we shadowed the primary account manager executing a sample scenario that covered the entire purchasing process. This included all stages from the point of contacting a potential customer until closing a deal. We determined that three out of seven of these steps could benefit from integrations. The first automation would cover initial interactions with potential customers through Copenhagen Cycles' interest form, by creating a lead directly into Zendesk when the form is submitted. The next integration would look to enhance the existing Make connection between Zendesk and E-conomic by automatically logging the email on a new deal in Zendesk when a quote is created. A final integration would link Podio to Zendesk, updating client information needed to provide the invoice after completion of the order form.

Objective 2:

To meet our second objective, we compiled data from our participant observation study and client interviews to gain a better understanding of the purchasing process. Acting as potential clients, we felt the entire process was simple, the forms were easy to fill out, and the constant communication with the account manager made the purchase easygoing. From client interviews, we gained insight into how affiliates felt while fundraising and purchasing a bike. Six clients were interviewed, five of which have purchased a bike and of those, four have made multiple purchases. Customers experienced similar feelings to our participant observation study, however, they had additional feedback about the process. The majority of clients stated that the best part of shopping with Copenhagen Cycles was the personalized support they received, highlighting the value of the primary account manager. The interviews also frequently cited the unforeseen difficulties with shipping and the quality control of trishaws that fell outside the control of Copenhagen Cycles. Accounts of missing parts or incorrect trishaw models were noted in four of the five client purchases. Despite quality and shipping complaints, customer service coupled with the clients' passion for CWA outweighed their initial setbacks, resulting in customers continuing to shop with Copenhagen Cycles. Finally, when asked to share advice for buying a trishaw, interviewees noted the lack of education they found on trishaws, the importance of understanding bicycle maintenance, and the need to connect with other chapters to boost success.

Objective 3:

Utilizing the data collected from objectives 1 and 2, our team was tasked to identify a set of strategies to optimize the essential software of the sales portal at Copenhagen Cycles. Table A outlines these strategies and the proposed benefits to the organization.

Table A: Strategies to optimize the online portal for sales at Copenhagen Cycles

Strategy	Description	Purpose / Benefits
Upgrade from Zendesk Sell to Zendesk Suite	Update Copenhagen Cycles' contract to add Support, Chat, and Sandbox functions	Establish a framework for CRM operations and an environment for testing scenarios
Replace Tidio with Zendesk Chat	Integrate Zendesk Chat to Copenhagen Cycles' website and remove the use of Tidio for support	Add customer support to operations on Zendesk, eliminating the need for Tidio
Update Zendesk Deal from Podio order form	Use Make to link Podio and Zendesk Sell to grab details from order and update a deal to won stage	Remove manual input and generate accurate grouping of data for pipeline organization
Add trishaw support resources to Copenhagen Cycles' website	Produce a hyperlink to Copenhagen Cycles' website for submitting a support ticket and additional trishaw resources	Integrates Zendesk Guide and gives customers easier access to support resources
Incorporate Automated Actions for Deal changes on Zendesk	Add Automated Actions that create reminders for employees after the deal stage changes	Create a structured system for employees to follow up with clients after specified time increments
Automate entry of customer information from interest form	Use Make's text parser function to create leads in Zendesk Sell	Remove manual input and safeguard contact information by populating a database
Add email information from E-conomic to Zendesk	Improve the integration by adding email info with the additional data	Create easy access to client details across the deal process

Discussion

Following the collection of data for our three objectives, recurring themes appeared that shed light on additional threats to Copenhagen Cycles' organization beyond streamlining their software. It is evident that considerable institutional knowledge is held by a single employee, creating a vulnerability to the organization. Therefore, areas of the IT landscape must be automated to reduce dependency. However, technology must work in synergy with customer relationships, not eliminate them. Additionally, interviews with clients highlighted the frustration with shipping and quality issues with trishaw purchases, as well as the need for more educational resources post-purchase. A more supported approach would better prepare and educate a new trishaw buyer, increasing feelings of relief and security when completing their order.

Recommendations

Train employees using our Standard Operating Procedure and update the training as the company grows	Evaluate the proposed integrations and maintain changes to the IT landscape
Send follow-up email to client to reinforce existing trishaw support resources	Collaborate with a WPI 2025 project team to improve shipping reliability and quality control

Copenhagen Cycles' creativity and commitment to helping others has motivated our team to find new ideas that could be implemented in the future. We hope that our work has made tangible change in the company's IT structure, but also provided avenues for new opportunities for the company moving forward.

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1. Laying The Groundwork

Copenhagen is one of the most bicycle-friendly cities in the world and a model for integrating cycling into the cultural fabric of the community. The city has promoted biking as a way of life for individuals of all ages and mobility levels by making cycling more accessible. (Denmark.dk, 2018). One of the most important non-profit organizations that has emerged from this movement is Cycling Without Age. Founded in 2012 by Ole Kassow, Cycling Without Age aims to bridge generational gaps and combat loneliness through shared bike rides for the city's elderly using a trishaw, a three-wheel battery-powered vehicle with a carriage in the front. Copenhagen Cycles, an organization also founded by Kassow in 2016, supplies these trishaws and works to fund Cycling Without Age through trishaw purchases. Together, the two entities promote the same values, emphasizing the importance of mobility, cross-generational relationships, and social inclusivity (Copenhagen Cycles, 2022).

As the organization grows, Cycling Without Age and Copenhagen Cycles saw an opportunity to revamp and improve their sales strategies through the optimization of the customer relationship management (CRM) platforms used in their operations. Their system utilized six platforms, but they wanted to consolidate their IT landscape to better maximize Zendesk, a CRM tool that enables companies to manage leads, deals, and customer interactions more efficiently. The goal of this project was therefore to streamline Copenhagen Cycles' sales using Zendesk to increase customer retention across the purchasing process. To achieve this goal, we completed the following objectives: 1. Assessed the current and potential integration of all CRM platforms to identify areas of improvement; 2. Understood the purchasing process from the customer's perspective; 3. Identified and tested strategies to optimize the sales portal for Copenhagen Cycles. Our aim was to provide a strong foundation for success at Cycling Without Age.

2. Understanding Our Project's Scope

This chapter outlines the mission of Cycling Without Age (CWA) and characterizes the needs of the stakeholders that are involved in our project. We investigated the opportunities and barriers for integrating CRM tools in a non-profit organization which differs from traditional business strategies. Finally, we explored implementation strategies used by non-profits to better understand how CRM sites can be integrated into a company's operations.

A Vision of Cycling without Age

To better understand the focus for this project, we first examined the vision that supports CWA. As a non-profit, CWA relies heavily on engaging community volunteers at every level of the organization. To grow membership, it leverages a model that enables partners such as nursing homes, city programs, or even individuals to establish a CWA chapter free of cost. Those participants become affiliates, sharing a common

Figure 1: Ole Kassow with 95-year old rider and Telegraph reporter on a CWA bike ride (photo credit: Alzate, 14/03/2024)

passion for CWA's mission of inclusive mobility no matter the age. The approach has been largely successful, spanning internationally as seen in the growth of over 3,050 chapters, 39,000 pilots, and 3 million trishaw rides around the world (Cycling Without Age, n.d.). In fact, when senior riders were asked about their experiences on the trishaw and prompted to give one word to describe the experience, the majority cited "freedom" as the first word to come to mind (Active Towns, 2023).

As a successful non-profit, it is imperative that volunteers stay motivated and connected with this mission at CWA. The risk of attrition is high. While the average turnover rate for paid employees at for-profit companies is approximately 12%, NGOs face a turnover rate of about 19% among their volunteers (Branson, 2020). This creates a need for community connection between volunteers in order to sustain the work provided by a non-profit. To that end, CWA strives to increase retention by maintaining core guiding principles of generosity, cultivating relationships, celebrating "slowness" and ageless participation, and building storytelling (Cycling Without Age, n.d). For both trishaw pilots and riders alike, the principle of "slowness" encourages intentional appreciation for the present moment while the concept of storytelling is the catalyst in bridging generational gaps within CWA.

In addition to its core principles, CWA has identified three UN Sustainable Development Goals (SDGs) that align with their efforts to support sustainability and community well-being. Goal 3: Good Health and Well-Being and Goal 10: Reduced Inequalities promote mental and physical well-being through outdoor trishaw rides and meaningful social engagement between cyclists of all ages. Goal 11: Sustainable Cities and Communities focuses on the efforts CWA has made to keep Copenhagen bicycle-friendly and highlights the need for spreading inclusive programming to new cities, which is showcased in the creation of more than 3,050 CWA chapters across the world (The Global Goals, 2023; Cycling Without Age, n.d.).

Mapping the Social Enterprise

CWA faces several legal limitations on the actions it can take as a 501(c)(3) non-profit organization. Being an NGO, it is not supported by venture capitalists and can only rely on loans, government funding, grants, and donations. As a solution to these limitations, Copenhagen Cycles fully funds the endeavors of CWA using a social economic enterprise business model. This allows Copenhagen Cycles to operate as a for-profit organization while allocating profits from generated sales to the CWA mission. At the forefront are Ole Kassow and Ciara Kassow. Ole Kassow oversees both CWA and Copenhagen Cycles, while Ciara Kassow is the key account manager at Copenhagen Cycles. Their input is vital in the decisions of both enterprises, making decisions for not only Copenhagen's chapter but for all CWA chapters around the world. This arrangement ensures financial stability for CWA and leads to the creation and retention of new chapters through trishaw funding.

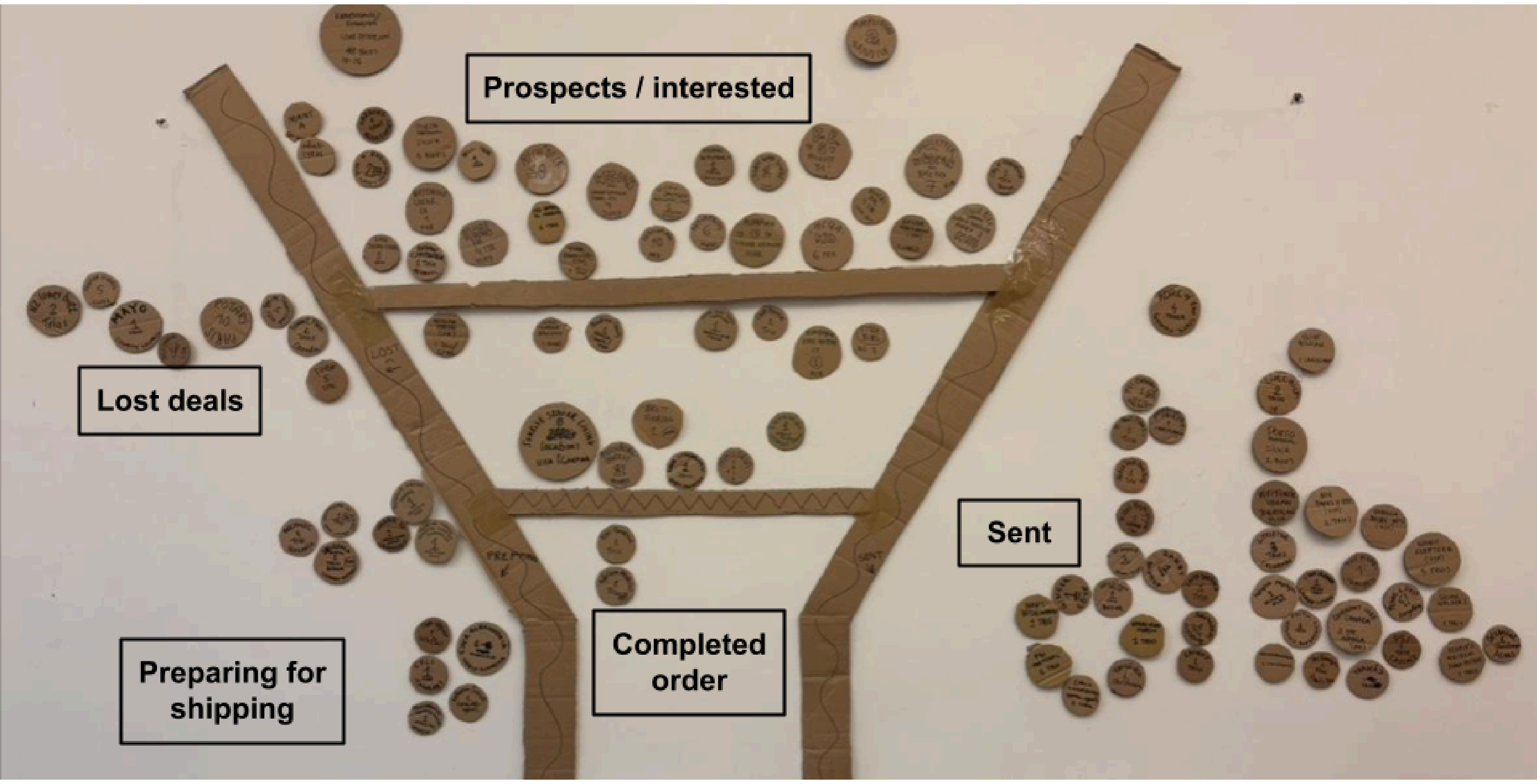

Figure 2: Visual representation of sales funnel in CWA and Copenhagen Cycles' office.

Copenhagen Cycles is a valuable mechanism for supporting CWA's infrastructure. Figure 2 depicts Copenhagen Cycles' sales funnel, which narrows down potential clients (circles) based on the purchasing stage they are at. The size of the circle correlates to the size of the trishaw purchase. After securing the deal, which is the lowest point of the funnel, the circles are then moved to the bottom left, which implies orders are being prepared for shipping. When delivered to the client, their circle is moved to the right side of the funnel. They are arranged like the CWA logo, symbolizing that the purpose of these sales is directly tied to the mission of the non-profit organization.

Optimizing Strategies for a Non-Profit

When analyzing the functionality of a non-profit, the organization must effectively fulfill its mission with its provided resources. Nonprofits face a number of challenges ranging from retirement and management turnover to staffing changes (Zhat et al., 2017). Nonprofits also tend to neglect risk management strategies, placing their focus on how to sustain their operations (Santos & Laureano, 2023). Because of this, they lend themselves to more vulnerabilities than a for-profit company. In addition, it is clear from our research that financial vulnerabilities stand at the forefront of non-profit challenges. These include funding sources, applying for grants, and employee salaries.

A strong IT landscape can alleviate some of these weaknesses. In order to gain a competitive edge over other organizations, a cohesive IT platform along with a strong network of support for that platform can offset staffing variability and improve a nonprofit's internal organization (Gratton, 2018). To streamline services, nonprofits can use a management platform, such as a CRM, to ensure all streams of communications and actions, such as sales, customer support and account management, are connected under one channel. Within the ecosystem of Copenhagen Cycles and CWA, a unified CRM platform offers numerous advantages that enables the organization to keep a focus on its mission. A CRM can generate and maintain relationships with the clients providing a basis for customer loyalty (Kristoffersen & Singh, 2004). CRM tools can range from automating email communications to predicting future client behavior. Regardless of its applications, CRM implementation can be an important strategy for acquiring, retaining, and improving the management of customers (Blery, et al., 2006). Merged with marketing and operational strategies, a CRM platform can enable nonprofits to not only manage their customer bases but also generate personalized experiences tailored to each individual client. Over time, these connections are strengthened through customization, attentive service and continued support. As seen in Figure 3, the emphasis on building a personable relationship with the client motivated Copenhagen Cycles to create a painting inspired by the chapter's location.

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Figure 3: Customized painting on trishaw shipping container for client in Alexandria, Minnesota (photo credit: Alzate, 14/03/2024).

Applications of Zendesk Sell

Zendesk Sell, a newly developed CRM platform, has been recently integrated within Copenhagen Cycles' operations to improve sales automation (Network Asia, 2018). The platform promises to simplify the management processes while emphasizing the importance of customer connections and retention (Zendesk, n.d.). According to Forbes, Zendesk Sell is well-known within small business management, making it a good match for the operations of Copenhagen Cycles. It distinguishes itself from other CRM platforms due to its cohesive format that allows its users to manage prospective leads, existing accounts, and customer contacts in one central location. Additionally, Zendesk Sell tracks company metrics and forecasts future data trends. This provides users with full visibility of the sales pipeline to track the progress of a sale and determine areas of improvement in their processes. Zendesk Sell also has the potential to automate repetitive processes, improving the overall efficiency of the workflow. Another benefit of the platform is its free trial, allowing organizations to experiment with the software before fully committing to a new program (Cusson, 2024).

Although Zendesk Sell boasts many features, users have experienced difficulties with the software. System-wide email integration with Zendesk Sell has been riddled with errors, impacting a company's ability to stay in contact with current customers and new potential buyers (Cusson, 2024). Copenhagen Cycles also expressed its frustration with this issue as it integrated Zendesk Sell into its operations. Without a working email system, Copenhagen Cycles could not automate its customer outreach process. Furthermore, the organization wished to integrate current platforms directly into Zendesk Sell, creating a hub that links all potential points of information in one place. The expectation was that by merging platforms under Zendesk, Copenhagen Cycles' operations would be better organized and more efficient.

Important Lessons Learned in CRM Integration

Early Adopters of CRM Strategy

Plan Norway, the Norwegian branch of the non-profit Plan International, was established in 1996 to promote child sponsorship to help others build a bridge of understanding with marginalized communities. To offset recruitment instability, the organization decided to implement a CRM process to expand its focus in sponsor retention. In just three years after its implementation, Plan Norway went from 65,000 to 90,000 sponsors, and an average attrition rate of just 6.5% (Kristoffersen & Singh, 2004). Nowadays, the case shows the benefits and key aspects of incorporating a CRM process at non-profit organizations. The case study on Plan Norway identified a learning curve when properly adopting a new CRM platform. To effectively integrate a customer management program, strategy, customers, processes, and technology must be considered equally.

At the time, less than 15% of Plan Norway's income came from governmental subsidies, making it highly dependent on its success in raising money (Kristoffersen & Singh, 2004). This enabled Plan Norway to understand the value of its customers, recognizing that while positive experiences have a favorable impact on customer loyalty, negative ones may drive customers away. To better understand customer expectations and requirements, the organization determined that a feedback system was necessary to encourage communication with customers (Kristoffersen & Singh, 2004). This insight applied to the relationship between Copenhagen Cycles and its clients, where the funding and purchasing process can take months to complete. Plan Norway was successful in the implementation of its CRM strategy because it did not neglect the processes that help organizations endure, unlike many non-profits that only focus on building programs and raising money (Kristoffersen & Singh, 2004). Organizations should focus on improving their customer's experience to not only increase satisfaction but also competitive differentiation. Technology is an essential asset to ensure the success of incorporating a CRM process into an organization. Plan Norway's measure of success was integrating its baseline dataframe, PLANSys, into a new CRM platform (Kristoffersen & Singh, 2004). Similarly, Copenhagen Cycles faced the opportunity to integrate its different streams of communication into Zendesk.

An analysis of Plan Norway's case highlighted for us that before looking at internal software changes, it is necessary to set clear standards and indicators of success. Although the case refers to events that happened more than two decades ago, we considered its findings to be relevant when strategically incorporating a CRM tool into an organization.

Automating Customer Interactions

As technology has advanced, CRM software has enabled effective and streamlined customer retention strategies. These tools have evolved to better tailor customer service, aiming to automate one-on-one interactions with clients. Because every customer exhibits different needs, backgrounds, and purchasing behaviors, CRM applications have grown exponentially since the mid-90s when the software was first marketed (Sakunthala, 2023). Information Technology (IT) advancements have significantly transformed the marketing and customer interaction sector, making an argument that organizations will find more success if they focus on retaining loyal customers instead of attempting to gain a dominant market position. With this, the CRM platform services have expanded to all industry ranges and company sizes.

In recent years, the trend of outsourcing CRM tools led by companies like Salesforce has helped smaller organizations take advantage of the growing benefits from structured IT resources. Resources including electronic and mobile CRM tools (E-CRM & M-CRM) in addition to cloud computing, have enhanced customer interaction effectiveness and fostered personal relationships using customization (Sakunthala, 2023). Overall, the evolution of CRM inspired Copenhagen Cycles to follow this trend by incorporating Zendesk Sell in the management of potential clients interested in buying a trishaw.

Summary

Our review of the literature revealed three key points that informed our project. First, the social enterprise business model ensures the financial security of non-profit organizations, helping them fulfill their mission. Because non-profits face different vulnerabilities than for-profit organizations, it is crucial to have processes in place for strategic risk management to sustain their company and mission. Second, when learning about Zendesk Sell, there are both advantages and disadvantages to the software that must be navigated to ensure the CRM is optimized. CRM platforms can simplify daily tasks but also can increase the number of technological roadblocks. Lastly, a successful CRM integration focuses more on interpersonal relationships between the nonprofit and its customer base and stakeholder strategy than the technical software itself. By combining collaboration with technical integrations, the purchasing process becomes smoother and more efficient for both employees and customers.

3. Mapping Our Data Collection Approach

The goal of our project was to streamline Copenhagen Cycles' sales using Zendesk to increase customer retention across the purchasing process. Our research was guided by three objectives: (1) Assess the current and potential integration of all CRM platforms to identify areas of improvement; (2) Understand the purchasing process from the customer's perspective; (3) Identify and test strategies that can optimize the sales portal for Copenhagen Cycles.

Our first objective was accomplished through a baseline assessment of all CRM platforms. We began by assessing the functionality of the CRM landscape consisting of Podio, E-conomic, Tidio, Zendesk Sell, and Make through detailed annotations and process mapping. We observed how the customer account manager used these platforms across the purchasing process, classifying the purpose of each step and defining areas of automation. After identifying potential changes, we watched tutorials and attended two webinars to expand our understanding of features that could be applied to the software. Additionally, we had informal open-ended interviews with the Copenhagen Cycles' management team to highlight desired areas of improvement within the CRM landscape.

To complete our second objective, we learned more about the purchasing process from the viewpoint of a customer. We first conducted a participant observation study to understand how a trishaw is purchased from a client's perspective. Each member of the team represented a new customer purchasing a trishaw and noted their observations throughout the sales pipeline. We then conducted multiple semi-structured interviews with clients who had both positive and negative experiences purchasing a trishaw through Copenhagen Cycles. We structured the interview questions to learn more about their perspective, aiming to find valuable insight into trends and patterns that occurred beyond the use of CRM platforms. This was crucial in accommodating customer needs when making changes to the CRM platforms.

For our final objective, we identified and tested new strategies to further integrate Zendesk into Copenhagen Cycles' purchasing process. We used data from objectives 1 and 2 to help identify opportunities for tangible change. We then executed integrations in the software based on suggestions from internal and external stakeholders. This was aimed to automate and link major tasks to Zendesk, simplifying the purchasing process for both the customer and the company. Finally, for Copenhagen Cycles, we provided a standard operating procedure (SOP) to allow others in the management team to navigate the site.

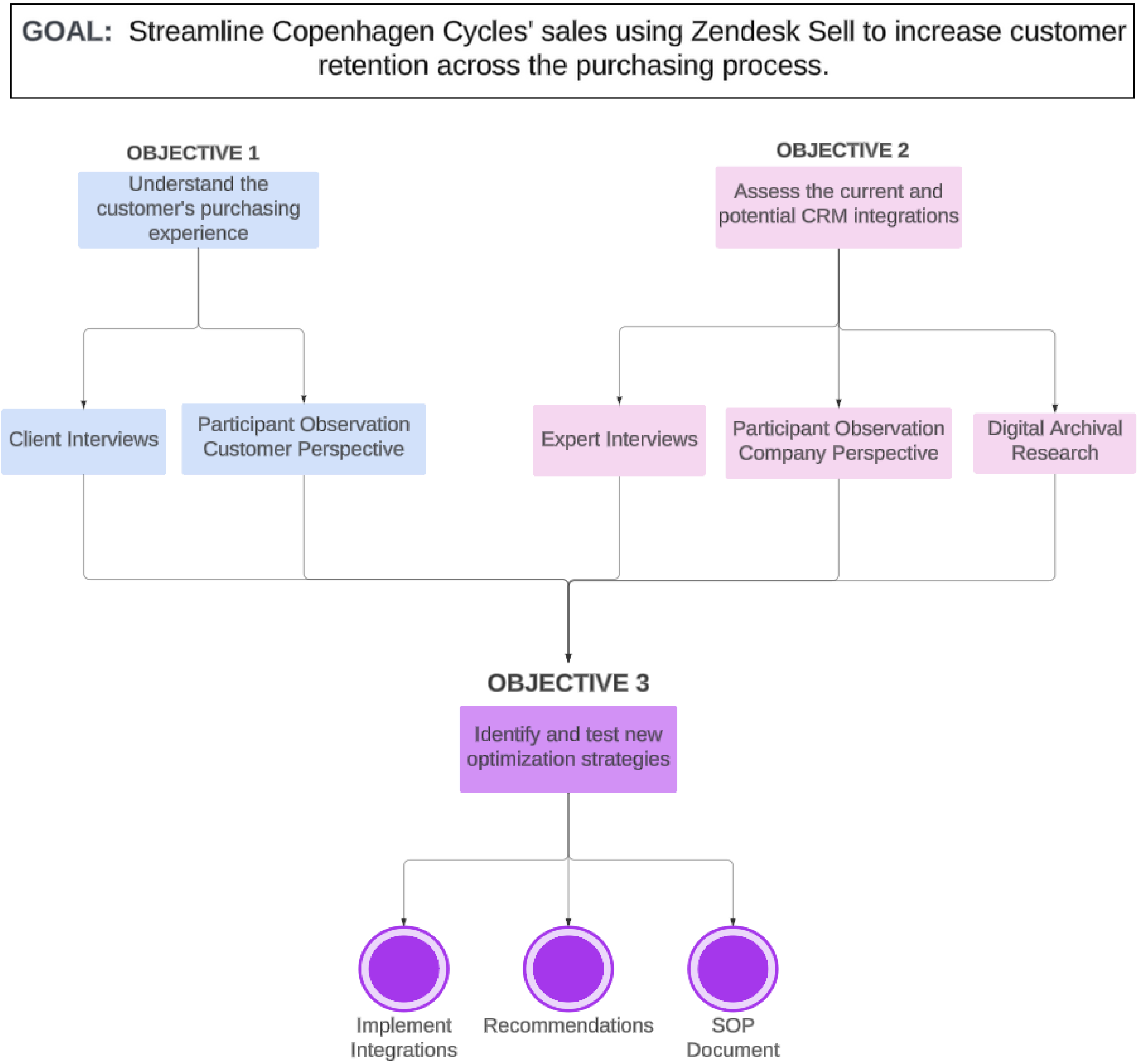


Figure 4: Our Methods

4. Results and Discussion

After outlining a path to complete our goal, we conducted various studies and interviews to optimize the use of CRM platforms for trishaw purchases. The data collected helped us understand the patterns underlying the business practices at Copenhagen Cycles. Here we present our results by objective:

Objective 1: Assess the current and potential integration to identify areas of improvement

Baseline Assessment of Current IT Landscape

We undertook extensive archival research to conduct a baseline assessment of the current integration of all CRM platforms. Zendesk Sell is the overall management tool that comprehensively tracks customer engagement during the trishaw purchasing process for Copenhagen Cycles. Compared to other full-scale CRM platforms, our research showed that Zendesk works with small business and non-profit operations to provide support with managing leads, storing customer information, and optimizing sales strategies. A financial platform called E-conomic is used to generate quotes for each trishaw purchase. Copenhagen Cycles utilizes this system to create and store invoice receipts for each client.

To facilitate the interactions between each CRM platform, Copenhagen Cycles uses software called Make. Through webinars and tutorial training videos, we learned that Make was selected over other comparable platforms because of its unique ability to link quotes from Economic to specific client deals in Zendesk Sell. Another software called Podio is used to send a web form to the customer to collect the necessary information at the order confirmation stage of the purchasing process. This platform is integrated with the other CRM platforms and is manually linked to the order number in Zendesk. Tidio is the current chatbot system on the Copenhagen Cycles' website and it is responsible for maintaining conversations with potential buyers directly from the website. The final platform is called Mailchimp, which sends out weekly newsletters twice a month to both subscribers of CWA and Copenhagen Cycles. Based on our comprehensive baseline assessment of the IT landscape including the six CRM platforms, we learned that there are many moving parts that are involved in the purchasing process.

Overview of the Purchasing Process

After acquiring an in-depth understanding of the platforms, we analyzed how Copenhagen Cycles uses them to manage interactions with each customer during fundraising and purchasing. We shadowed the primary account manager, Ciara Kassow, executing a sample scenario that covered the entire purchasing process, starting from the point of contacting a potential customer to closing the deal. A visual description of the process of purchasing a trishaw is illustrated in Figure 5.

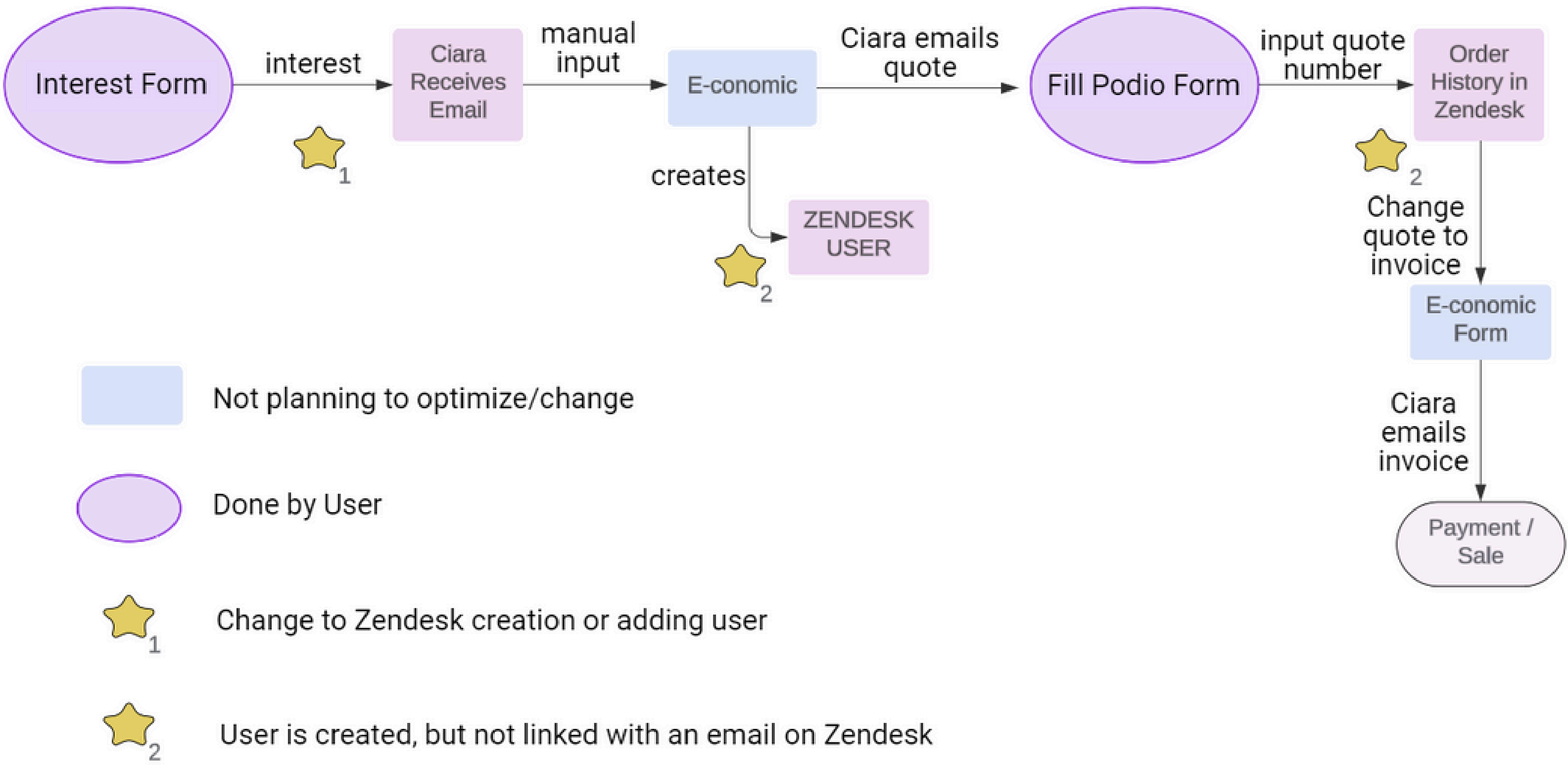


Figure 5: Trishaw purchasing process

The process in this flowchart triggers multiple steps. Copenhagen Cycles initiates contact with a potential customer from the interest form posted on its website. This form directly sends client details to the primary account manager. At this point, we observed that the records for new customers were only linked to this email, showing no intersection with their platforms used to create and manage deals.

The use of the CRM landscape in the process began by creating a quote for the new client. The account manager manually inputted the client information from the email into E-conomic. The quote creation generated a new deal in Zendesk Sell. This integration was developed with the platform Make, which transferred the information from E-conomic to Zendesk. However, the integration did not include the clients' email, requiring the account manager to manually log the email on Zendesk for every deal. At this point of the study, we determined that without an email and login details, it would not be possible for anyone else in the organization to understand how the integration between E-conomic and Zendesk Sell worked.

After the deal is created, a follow-up email is sent with the quote and future steps. The client is prompted to begin fundraising. It can often take weeks or months to continue to the next step, which is the completion of the order form using Podio. Personal insight from conversations with the account manager during the shadowing process emphasized the need for an avenue to maintain conversations with affiliates during the time that they are fundraising. Many deals are not completed due to sticker shock from the quote, fundraising issues on the client side, and client disengagement. It was noted that Copenhagen Cycles lacked a support system that could intervene or mitigate these losses.

The deal scenario did not cover the estimated time it takes for customers to reach back with an order form, but the account manager noted that it can take 3-8 months. When the order form is completed, the account manager then can revise the input from the client and confirm the deal information manually in Zendesk Sell. When observing this step, we realized that some parts of the process require manual input. She mentioned that errors from users could potentially transcribe misinformation if pasted directly from the customer through an integration like the one used with E-conomic and Zendesk Sell. Therefore, this step would purposefully best be excluded from automation.

The final step in the purchasing process was converting the quote to an invoice, which was a simple task completed using E-conomic. Shadowing her also confirmed that this step did not need additional automation, hence concluding the purchasing stage for the organization.

Additional Insight with Expert Interviews

Expert interviews were conducted with the Copenhagen Cycles founder and account manager to gain insight into the changes they would like to see in the IT landscape. The account manager discussed her preference for a more consolidated and integrated workspace that would be easier to navigate for both her and future account managers. She also mentioned technical issues with email integration and frustration with needing to create customer accounts on multiple platforms. Overall, they emphasized the need for a streamlined workflow that is easy to follow and reduces the steps through the purchasing process.

Additionally, she expressed frustration with the company's dependence on her role in a recent situation involving the Copenhagen Cycles' management team. A mix-up occurred where clients received emails from the account manager's account, which appeared to be misinformed about their status in the purchasing process. This occurred because another employee was responding to the account manager's clients' emails to lighten her workload, but the only way to do so was by logging directly into her email account. Clients thought the misinformed emails originated from the account manager, jeopardizing the personal relationships formed during the purchasing process.

To meet our second objective, we compiled data from our participant observation study and client interviews to gain a better understanding of the purchasing process. Our annotations from the client point of view provided insight into the ease of Copenhagen Cycles' purchasing process. Acting as potential clients, we felt the entire process was simple, the forms were easy to fill out, and the constant communication with the primary account manager made the purchase easygoing. On the customer end, there are two forms that must be filled out before the purchase is complete, one to receive a quote and one to provide shipping information. These forms required straightforward answers and together took under five minutes to complete. During our study, we felt the purchase was as supported as it could be for a virtual correspondence.

From client interviews, we gained insight into how affiliates felt while fundraising and purchasing a bike when starting a new chapter. Six clients were interviewed, five of whom have purchased a bike and of those, four have made multiple purchases. The clients' locations ranged from North America to Europe providing a wide array of data and differences within chapters. They experienced similar feelings to our participant observation study, noting that the email communication was strong and the forms were straightforward. Once they submitted the form, they appreciated how the primary account manager guided them through the rest of the process. They felt that the website was easy to navigate and both forms did not pose any questions.

"The process was seamless. Seamless from start to finish."

- Craig, chapter affiliate from Alexandria Minnesota

"Felt as simple as making any other online purchase in Canada"

- Lauren, chapter affiliate from British Columbia

However, when asked about the experience overall, customers had additional feedback about the process. The most common point highlighted the value of the primary account manager as a point person in the purchasing process. Many customers noted the excellent quality of response rate and transparency exhibited in their purchases. The account manager was quick to answer any questions and customers enjoyed interacting with her. The majority of clients stated that the best part of shopping with Copenhagen Cycles was the personalized support they received.

The interviews also frequently cited the unforeseen difficulties with shipping and the quality control of trishaws that fell outside the control of Copenhagen Cycles. Accounts of missing parts or incorrect trishaw models were noted in four of the five client purchases. Furthermore, one interview recounted the delivery of a bike with the shipping container badly dented, resulting in additional time to process the return and replacement of the bike (Google Meet, R. Boire-West, April 2, 2024).

Figure 6: Dented shipping box received by Rebecca, chapter affiliate from The Adirondacks

> **“My biggest, largest concern with obtaining and receiving a bike is that it literally comes in a cardboard box...nothing to protect the bike. The problem with the first bike was that it literally looked like it was dropped... The wooden pallets underneath it were crushed. The box and stuff on top was crushed in.”**
>
> – Rebecca, chapter affiliate from The Adirondacks

We found that Copenhagen Cycles has a loyal customer base. Despite quality and shipping complaints, customer service coupled with the clients’ passion for the CWA cause outweighed their initial setbacks, resulting in customers continuing to shop with Copenhagen Cycles.

> **“I would have to say that I’m hesitant, I’m hesitant on their quality control. What makes me think that we would still purchase again is the way they handled the issue.”**
>
> – Rebecca, chapter affiliate from The Adirondacks

Finally, the client interviews emphasized the need for educational resources for new buyers who are wishing to start a chapter. When asked to share advice for buying a trishaw, interviewees noted the lack of education they found on trishaws, the importance of understanding bicycle maintenance, and the need to connect with other chapters to learn from their experiences and boost success. Additionally, clients wished they had received more help with international barriers, noting details such as the metric system conversions and having to buy adapters (Google Meet, C. Andrews, March 19, 2024). Overall, clients felt that the basic resources provided on Copenhagen Cycles' website were helpful, but additional resources would enhance the purchasing and provide ongoing support for ownership. One affiliate, for example, introduced the idea of 'shareable good' in which other affiliates can share their strategies in a collective database that would help chapters prosper.

"There is so much shareable good to use to help others"

- Juan, chapter affiliate in the fundraising process from Severna Park, Maryland

Objective 3: Identify and test strategies that can optimize the sales portal for Copenhagen Cycles

After analyzing the data from objectives 1 and 2, our team was tasked to identify a set of strategies to optimize the essential software of the sales portal at Copenhagen Cycles. Table 1 outlines these strategies and the proposed benefits to the organization.

Table 1: Strategies to optimize the online portal for sales at Copenhagen Cycles

Strategy	Description	Purpose / Benefits
Upgrade from Zendesk Sell to Zendesk Suite	Update Copenhagen Cycles' contract to add Support, Chat, and Sandbox functions	Establish a framework for CRM operations and an environment for testing scenarios
Replace Tidio with Zendesk Chat	Integrate Zendesk Chat to Copenhagen Cycles' website and remove the use of Tidio for support	Add customer support to operations on Zendesk, eliminating the need for Tidio
Update Zendesk Deal from Podio order form	Use Make to link Podio and Zendesk Sell to grab details from order and update a deal to won stage	Remove manual input and generate accurate grouping of data for pipeline organization
Add trishaw support resources to Copenhagen Cycles' website	Produce a hyperlink to Copenhagen Cycles' website for submitting a support ticket and additional trishaw resources	Integrates Zendesk Guide and gives customers easier access to support resources
Incorporate Automated Actions for Deal changes on Zendesk	Add Automated Actions that create reminders for employees after the deal stage changes	Create a structured system for employees to follow up with clients after specified time increments
Automate entry of customer information from interest form	Use Make's text parser function to create leads in Zendesk Sell	Remove manual input and safeguard contact information by populating a database
Add email information from E-conomic to Zendesk	Improve the integration by adding email info with the additional data	Create easy access to client details across the deal process

Upgrading to Zendesk Suite

The first strategy we completed was upgrading the Zendesk software from only Sell to Zendesk Enterprise Suite. This upgrade gave Copenhagen Cycles access to Sell, Support, Guide, Chat, and Talk, increasing the capabilities of the software.

Tidio to Zendesk Chat

Once upgraded to Enterprise Suite, we were presented with the opportunity to remove overprocessing waste and cut costs by replacing Tidio with Zendesk Chat. We were able to set up Zendesk Chat and enable its connection with Sell and Support, facilitating direct creation of tickets when interacting with potential and current customers. We embedded and rendered the Zendesk Chat screen on the Copenhagen Cycles website and set up its visuals following the website theme. This strategy further consolidated CRM avenues into Zendesk. However, this change requires the removal of stored data in Tidio. Therefore, we have presented it to Copenhagen Cycles' executive team and suggested analyzing the possible changes before implementation.

Update Zendesk Deal with Podio Order Form

The final step before completing the purchasing process is the submission of the order form using Podio. This form is sent out when a deal is created, but only completed by a client when they are finished with fundraising and ready to purchase. Because this process can take months, it was crucial for us to update the status of the ongoing deal in Zendesk, decreasing reliance on employees to look at new entries of the form on Podio. The integration automatically removed manual input when updating order details into Zendesk and updated the deal status from 'quote sent' to 'deal won,' further optimizing Zendesk's pipeline feature. A total of eight iterations were attempted in order to retrieve the information from the submitted form, however, the integration only partially transferred the data. In order for all data to be transferred, the field types of the Podio form must match the field types in Zendesk. This would result in changing the Podio form by adding new field types and editing the current ones. Because of this, we have presented the functional integration to the Copenhagen Cycles' team, but have not activated it as the Zendesk deal would still need manual input. We decided to leave this decision to the discretion of Copenhagen Cycles' executives due to the risk for losses in client data.

Trishaw Support Resources on Copenhagen Cycles Website

An integration that directly impacts clients is the addition of the Trishaw Support Zendesk Guide hyperlink located on the Copenhagen Cycle's website. The link redirects customers to the Copenhagen Cycle's technical support page, which was created by the primary bike mechanic. The site is run by Zendesk Guide and operates as a FAQ page maintained by the management team at Copenhagen Cycles. The information and helpful resources are constantly updated to reflect the relevant issues clients are facing in regard to their trishaw maintenance. While this page has existed previously, there was no accessible way for clients to access this information directly from the website. Therefore, we produced a hyperlink that would redirect users from the Copenhagen Cycles website to the resource support page. This link is available in two locations, one in the FAQ drop-down menu and the other in the form of a button on the home page. Through this addition on the website, clients have access to all necessary support resources and articles for specific trishaw questions.

Automate Entry of Customer Information

We tested the creation of customer accounts through a Zendesk embedded link form. We coded the form to render on Copenhagen Cycles' website successfully. Ideally, when submitted, the form would automatically create a new lead on Zendesk. However, we submitted the form and it repeatedly produced an error message. This error message did not allow the lead collection data to be transferred to Zendesk. We then shifted gears and used a third-party integration site called Zapier. Zapier connected the form from Copenhagen Cycles' website to Zendesk through an add-on called Zapier Email Parser. When tested, an email would be sent to an employee alerting them of a new order and automatically creating a new lead on Zendesk. However, because this would increase the number of subscriptions for Copenhagen Cycles, we attempted to utilize Make's text parser function to perform the integration. This integration would watch for new emails, extract the information using the text parser, and then populate the information into a new lead on Zendesk. The text parser on Make was not as user friendly as Zapier resulting in the need for regular expressions to retrieve the data. Because of the time constraint, this integration in Make is still in progress. Our troubleshooting suggests that in addition to reviewing the pattern code in the text parser module, the Gmail settings must also be altered. The IMAP settings must be enabled so the filter can search solely for the emails from the interest form. Once the Gmail module is functional, the regular expression code in the current text parser module must be reviewed to ensure it accurately pulls all the fields. The fields that must be populated into a new Zendesk Lead are as follows: First name, Last name, Company, Email address, Phone number, Country, City, Message.

Email from E-conomic to Zendesk

The next integration we examined was one already created on Make, connecting E-conomic with Zendesk. This action triggers a new deal to be created in Zendesk when a quote is submitted in E-conomic. The integration is functional, however it does not link the email from the quote to the customer account on Zendesk, adding an additional manual step for someone in the office. Our first approach was to recreate the integration into Zapier, which had previously worked for us and is recognized by most companies as the primary integration software. Unfortunately, E-conomic is not a platform connected to Zapier, which made it clear to us that there are implications with incompatible systems. Make offers functions that Zapier does not have, and vice versa. Because of this, we continued troubleshooting with the original Make integration. After working with Make's customer support, we tried many different iterations to transfer the email. The email transfer is not functioning yet, and therefore, this integration is still in progress for Copenhagen Cycles. However, we were able to add the customer's email information by creating a new field in Zendesk. This enabled Copenhagen Cycles to link the email to a customer account which was not possible before. The new email field is editable in Zendesk, allowing for manual input until the integration is functional.

Discussion

By identifying areas of improvement to the purchasing process, our team was able to test and troubleshoot new integrations for Copenhagen Cycles to utilize. The management team and our team collectively agreed upon these improvements to the purchasing process as a way to better automate the system while still maintaining personal relationships with the clients.

Beyond the technical integrations that were completed, recurring themes appeared from our data collection that shed light on additional threats to Copenhagen Cycles' organization. As seen below in Figure 7, Copenhagen Cycles provided us with a social business model canvas to depict its social impact, value proposition, and key partnerships that furthered the growth of the company. For example, CWA created the concept of Partners, who represent and lead each country's operations. Its business model gives these Partners the responsibility to attract and oversee Affiliates who want to start their own chapters.

Recognizing affiliates as clients emphasizes the need for a strong retention strategy, which means that expanding sales is highly dependent on referrals and recommendations. Therefore, Copenhagen Cycles provides a trusted advisor to help customers feel supported. This creates open lines of communication for questions and concerns all while being guided through the purchase of a new trishaw. This strategy sets Copenhagen Cycles apart from other companies because of their ability to sustain customer relationships. By maintaining revenue streams through trishaw sales, Copenhagen Cycles can flourish, and in turn, ensure the financial stability of Cycling Without Age.

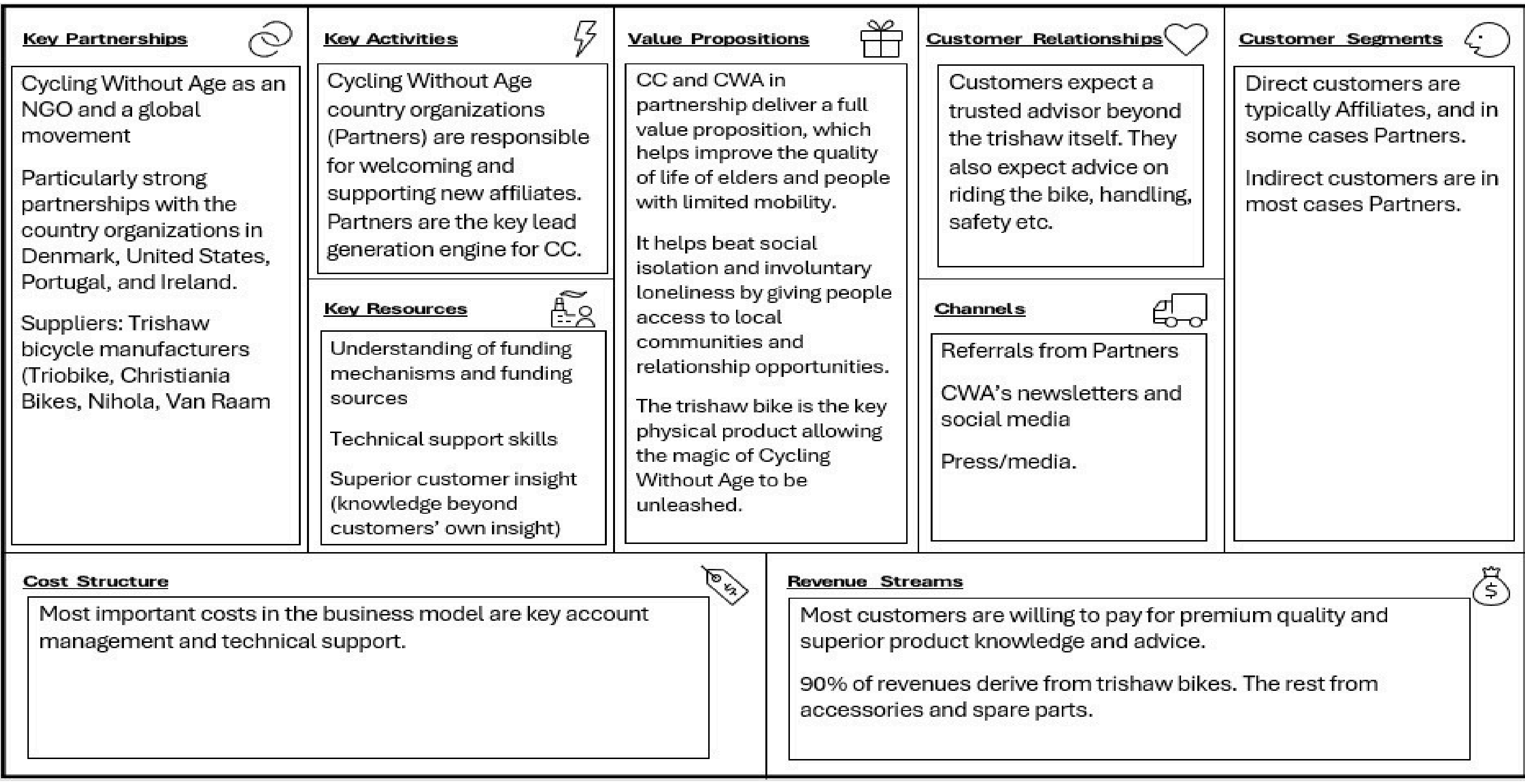


Figure 7: Copenhagen Cycles Business Model Canvas

This tool allowed us to better understand the organization from a holistic perspective, and helped us see the broader, social context of the project. By identifying concerns and opportunities that fell outside of software integration, we could support the Copenhagen Cycles management team and enhance the purchasing experience for clients.

From both client interviews and interviews with the management team, it is evident that considerable institutional knowledge is held by a single employee, creating vulnerability in the organization. In our process analysis, we noted that there are many client relationships and steps in the sales pipeline that rely on the account manager position specifically. This finding emphasizes a need to share her expertise to others in the organization. By reducing the pressure on this role, the organization can become more resilient and less dependent on a one-employee process. This finding aligns with the academic literature on organization management which points out the necessity to develop changes that allow current and future employees to understand, operate, and manage all platforms within a company. For this goal, automating steps within the sales pipeline is necessary to improve efficiency.

However, our findings also show that technology must work in synergy with customer relationships, not eliminate them. For example, in objective 1, we learned that certain processes cannot be automated and must be completed manually and carefully. In objective 2, customers emphasized the value of the guidance and support they felt during the purchasing process with Copenhagen Cycles. Strong customer relationships are pivotal for the retention and loyalty of clients to offset sales and delivery obstacles beyond the control of Copenhagen Cycles. In objective 3, while testing the new integrations, we hit roadblocks when platforms were introduced, adding complexities instead of simplifying them. We determined that the CRM structure can be automated, but only after defining constraints that mitigate the risk of losing clients.

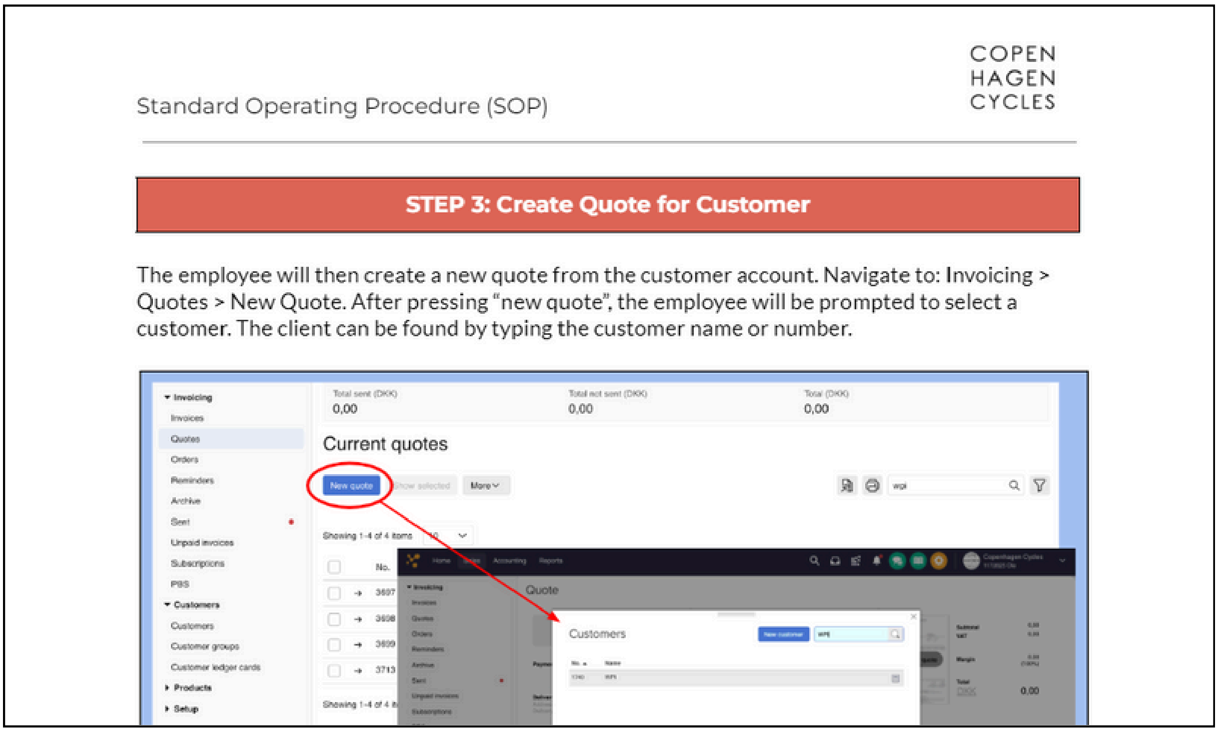
Despite the importance of customer relationships, minimizing the risk of external problems is also instrumental in maintaining the customer base. Interviews with clients revealed that a significant frustration lies with shipping and quality control with their trishaw purchases. Concerns voiced about shipping components, shipping damage, and missing items, indicate that clients could feel hesitant about future purchases regardless of having a very positive relationship with Copenhagen Cycles. CRM integration is then undermined if the clients are not satisfied with the order. Finally, recognizing that Copenhagen Cycles works with an international market, facilitating transactions between countries should be emphasized to strengthen trust in the company. A more supported approach, including follow-ups, frequent communications, and access to resources, would better prepare and educate a new trishaw buyer, increasing feelings of relief and security when completing their order.

5. Recommendations and Conclusion

When assessing the work we completed at Copenhagen Cycles, our recommendations focus on reducing employee dependency, improving the customer experience, and consolidating the IT platform. These recommendations work to streamline the sales pipeline while emphasizing the importance of customer retention through interpersonal relationships. The first three recommendations highlight our contributions to the Copenhagen Cycles organization, while an additional 4th recommendation calls attention to areas of improvement beyond the scope of our project. These recommendations were formulated to enhance the purchasing process for both Copenhagen Cycles and their clients.

Recommendation 1: Train employees using our Standard Operating Procedure and update the training as the company grows

When we assessed the sales process from an internal perspective it was clear that Copenhagen Cycles is highly dependent on its account manager. She managed client records, software platforms, and correspondence about purchases. Moreover, other members of the team possessed limited experience using the suite of CRM tools. To remove this threat, we determined that it was important to spread the knowledge of the purchasing process from a holistic approach.


Standard Operating Procedure (SOP)

COPEN HAGEN CYCLES

STEP 3: Create Quote for Customer

The employee will then create a new quote from the customer account. Navigate to: Invoicing > Quotes > New Quote. After pressing "new quote", the employee will be prompted to select a customer. The client can be found by typing the customer name or number.

Figure 8: Sample screen capture from SOP document

We described the sales process in a Standard Operating Procedure (SOP) with visual aids, covering the way the various software platforms interact during the purchasing process, including our new integrations. Figure 8, above, gives a sample from the SOP (see Appendix C for the full document).

We recommend that employees at Copenhagen Cycles understand and continue to learn about the steps to manage a sale in Zendesk and the integrations on the platform Make. To this end, the SOP can be assigned as a training module when an employee begins working at Copenhagen Cycles and reviewed on hand by other employees.

We believe that it is important to have all entities of an organization look at the setup of the purchasing process, regardless of their direct involvement with the sales. Having a company-wide overview of the process gives Copenhagen Cycles the certainty that they are not dependent on the knowledge of one employee. It also opens the possibility for other current or future executives to work on deals as well, increasing the efficiency of the company's business practices and providing opportunities for staff growth.

Recommendation 2: Evaluate the proposed integrations and maintain changes to the IT landscape

Seven changes to the current IT landscape have helped us enhance the efficiency of Copenhagen Cycles' operations. We believe that these improvements streamlined the workflow and will help sustain customer interest and engagement across the purchasing process. Therefore, we recommend that the organization evaluates the proposed integrations and maintains the current changes made to the IT landscape to enhance the experience for both internal company operations and clients. Table 2 outlines the status of each integration.

We recommend that Copenhagen Cycles assesses the CRM platform performance every year to ensure that the platform meets the changing needs of the company. As IT platforms are updated and new versions are released, it is essential to evaluate the current workflow to ensure it is still optimal. The yearly maintenance on the IT landscape will ensure that our implemented changes continue to streamline operations for Copenhagen Cycles. The SOP document can be used as a tool to assess the purchasing process. If there are areas that are no longer utilized by the company, the document should be updated accordingly.

Table 2: Current status of strategies to optimize the online portal at Copenhagen Cycles

Strategy	Proposed	Implemented	Status
Upgrade from Zendesk Sell to Zendesk Suite		X	Complete
Replace Tidio with Zendesk Chat	X		Complete - Instructions on implementation found in SOP
Update Zendesk Deal from Podio order form	X		In progress - Integration is functional, but data is partially transferred from Podio to Zendesk, requires additional work
Add trishaw support resources to Copenhagen Cycles' website		X	Complete
Incorporate Automated Actions for Deal changes on Zendesk		X	Complete - Baseline scenarios have been created to guide the creation of further actions based on employee needs
Automate entry of customer information from interest form	X		In progress
Add email information from E-conomic to Zendesk	X		In progress, email entry field has been created in Zendesk for manual entry until integration is live

A streamlined IT landscape operates in collaboration with strong interpersonal relationships. While automating the workflow reduces the overall dependency on the account manager and simplifies tasks, it is also important to be mindful of the role the account manager plays in customer retention. Our interviews showed that clients valued their positive experiences working with Copenhagen Cycles and valued the service and care they received throughout the process. Therefore, we recommend that one-to-one customer mapping remains a manual procedure so that the client feels supported by Copenhagen Cycles. By incorporating the personal touch from the management team, customers have indicated that they feel more secure with their purchases knowing they are in reliable hands.

When looking into the capabilities of AI technology, automating the initial direction of the conversation by prompting options such as "trishaw purchase", "support", or "general questions about Copenhagen Cycles" would be beneficial to the organization. The potential addition of a chatbot to a process like Zendesk Chat would allow Copenhagen Cycles to better guide customers. The chat feature would not replace eventual interactions with staff at Copenhagen Cycles, but would guide the initial purpose of contact so that less time is wasted on both ends. For a company like Copenhagen Cycles, we determined that a balance between automation and personalized customer support is necessary for the advancement of their operations.

Recommendation 3: Send follow-up email to client to reinforce existing trishaw support resources

From our interviews, we were told that it can be very difficult to go through the process of starting a chapter and buying a bike alone. This is a common experience for many clients, and we believe it would be beneficial for the organization to better market their support platform, The Hood, a resource that facilitates connections between various affiliates within the organization. This platform encourages affiliates to discuss their experiences and share strategies that helped them advance their chapter. It also provides them with resources such as grant applications and waivers. While Cycling Without Age currently provides new chapters with this resource at the start, it was noted that the onboarding process can be overwhelming. Many new affiliates overlook this feature during the initial onboarding phase. Therefore, we recommend that a follow-up email timed to coincide with the trishaw's arrival, is sent to the customer directing them to The Hood website and the Global FAQ page.

Additionally, one respondent noted that they did not know who to contact following the shipment of a damaged bike. Therefore, we would add the customer inspection statement to this follow-up email to ensure that customers are aware of their options and responsibilities when the trishaw arrives. The proposed email outline is shown below in Figure 9, and found in Appendix C.

Subject: Trishaw Resources from Copenhagen Cycles

Thank you for shopping with Copenhagen Cycles for your newest trishaw purchase! We appreciate your choice to shop with us and hope you are satisfied with your purchase.

We wanted to remind you to please inspect your trishaw upon delivery and report any damage to the delivery person within two days to ensure insurance coverage. Please reach out to Copenhagen Cycles as well with any questions or concerns regarding the trishaw.

Additionally, we recognize that buying a trishaw is a big purchase and want to ensure that you feel supported before, during, and after the purchase. Below we have included access to the Hood and our FAQ page. The Hood is an online community platform for CWA affiliates to build connections with other chapters and find helpful resources. The FAQ page can be accessed through the Copenhagen Cycles' website and provides technical support if maintenance issues arise.

The Hood : https://thehood.cyclingwithoutage.org/login
FAQ Page : https://copenhagencycles.com/faq/

Sincerely,
Copenhagen Cycles Team

Figure 9: Email script outline for follow-up email with customer after purchase

By providing these resources and reminders to new trishaw buyers, they will continue to feel supported after the purchase is made and delivered.

Additional Observations

A set of additional recommendations was derived from the data collected in our client interviews and conversations with the management team. The recommendations provide areas of future research that Copenhagen Cycles can pursue.

Recommendation 4: Collaborate with a WPI 2025 project team to improve shipping reliability and quality control

From our client interviews, we learned that customers emphasized that it was external factors, such as shipping and quality control, that most adversely impacted their purchasing process. These factors fall outside the scope of our project but could enhance the customer's door-to-door experience if addressed. Therefore, we recommend that Copenhagen Cycles collaborates with a WPI project team to assess the feasibility of mitigating these concerns. To jumpstart the process, our team developed research topics and guiding questions for shipping and quality control. To help visualize these concepts, we have outlined ideas for future deliverables that could serve Copenhagen Cycles below.

Investigate Options for More Secure Shipping

Our recommendation to further investigate options for more secure shipping is guided by three research opportunities:

1. Analyze the capacities of the current shipping partners;
2. Identify areas of improvement in shipping and handling;
3. Enact changes to mitigate trishaw shipping errors.

After conducting an expert interview to learn more about Copenhagen Cycles' shipping, it was understood that the company has worked with roughly ten different shipping companies since their operations began. Their primary shipping partner is Leman Shipping with a secondary partner of ScanGlobal. For their deliveries in Denmark, Copenhagen Cycles opt for more local companies. They chose Leman Shipping over ScanGlobal due to cost-effectiveness. Because of this, we recommend analyzing ScanGlobal from a holistic perspective, assessing factors such as their cost, reliability, convenience, and customer support. It would then be beneficial to perform a cost-analysis with both Leman Shipping and ScanGlobal. Depending on the results, it could be argued that if ScanGlobal is more reliable, the company would save money long term, and in turn, increase customer satisfaction and retention. Additionally, it is important to determine the extent to which trishaws incur damages or are shipped incorrectly at Copenhagen Cycles by finding the source of the problem. Following this research, Copenhagen Cycles could collaborate with the company to implement tangible changes that reduce shipping problems.

Improve Customer Support with Tracking and Delivery

Following the research of Copenhagen Cycles’ shipping procedures, we have proposed potential ideas related to shipping that would enhance customer support. As mentioned in the follow-up email recommendation, a client explained how they were unaware it was their responsibility to check the bike upon arrival for any damages. This agreement is written in fine print on the trishaw invoice but not reiterated once the trishaw is delivered. In addition to adding the customer inspection statement to the follow-up email, we believe it is beneficial to have a sticker on the shipping box to emphasize the message. We understand that not every user will check their email, however, a large yellow tag can often be more eye-catching. By having the contact information directly on the box, the lines of communication between Copenhagen Cycles and the client would be strengthened. The sticker would be printed at Copenhagen Cycles and attached during its quality control check. Its design can be found below and in Appendix C.

Figure 10: Shipping Sticker with Customer Inspection Statement

Additionally, a tracking link is a very important feature for online purchases. The customers currently are given an estimate for shipping arrival time from Copenhagen Cycles, which is often a range with no specific date. Leman Shipping does not have any tracking link associated with the trishaw shipping so it could be beneficial to identify tracking options with other companies, such as ScanGlobal. This would create more transparency with the customer, allowing them to better prepare for the arrival of their new trishaw.

It is also important to address the international barriers that Copenhagen Cycles faces when shipping globally. While this was a small portion of the topics discussed in interviews, we propose an add-on to purchasing a trishaw that supplies the customers with an adapter if they live outside of the European Union. We believe that providing adapters would increase the feelings of support for new bike owners who may not realize the plugs are incompatible. Similarly, some advice can be provided about metric tool sizing needed to maintain the bike in the case of American clients.

Finally, we discovered that clients experienced difficulties after receiving their trishaw. Based on our research and listening to clients, we recommend a pamphlet of information to be provided in the packaging of the bike. This pamphlet would include a succinct guide on how to operate the bike as well as an exploded view of all mechanisms and components. Additional content in the pamphlet would include the contact information for Copenhagen Cycles' bike mechanic for submitting a support ticket, and a link directing users to the FAQ page on Copenhagen Cycles' website.

As a trishaw can range from roughly $9,000 to $15,000, Copenhagen Cycles recognizes that clients should feel supported before, during, and after they buy their bike. These options will greatly enhance the purchasing experience for the customer, leading to the retention of clients and continued purchases with Copenhagen Cycles.

Optimize Quality Control

Our recommendation to further examine quality control is guided by two research questions:

1. Where is the source of quality control errors?
2. What can Copenhagen Cycles proactively do to address these concerns?

In our client interviews, we received different accounts of missing parts and incorrect trishaw models. The final inspection of a trishaw is completed by Copenhagen Cycles, however, miscellaneous parts such as batteries can be shipped directly from the manufacturer. Due to this discrepancy, we recommend investigating the source of the quality control issues in the form of a survey or email outreach to determine if it is a problem originating from Copenhagen Cycles or an external partnership. In addition, the team should assess the current quality control sheet used by Copenhagen Cycles and update it as the models change. One possibility would be to have a copy of a completed quality control sheet sent to the customer as proof that the trishaw was tested. This will create more trust between the client and Copenhagen Cycles.

The proposed recommendations address internal and external factors of the business practices at Copenhagen Cycles. We believe the suggested framework showcases our contributions to enhancing the purchasing process. Additional findings have highlighted the importance of considering customer concerns to further the growth of Copenhagen Cycles.

Conclusion

Copenhagen Cycles works to sustain the non-profit Cycling Without Age which promotes social interaction and cross-generational relationships for the elderly community. Our team strengthened the business practices of Copenhagen Cycles by improving upon internal workflow, creating a stronger foundation for success at CWA. Over the course of our time working with Copenhagen Cycles, we completed software integrations in Zendesk to optimize the sales processes and created an SOP document to help disseminate information across the company about potential clients as well as those who purchased a trishaw. By further integrating the software and identifying vulnerabilities to the organization, we expect that Copenhagen Cycles can dedicate its efforts and resources to furthering the social impact of CWA.

We have had first-hand experience in how this organization exudes passion for the CWA community and its mission of promoting inclusivity and mobility for the elderly community. This passion furthers the success of Copenhagen Cycles, not as a for profit organization, but as an avenue to support CWA’s growth. It has been a joy working with them and learning from them. We have learned how they navigate the constraints of a non-profit while always looking for opportunities to grow their business. Their creativity and commitment to helping others has motivated our team to find new ideas that could be implemented in the future. We hope that our work has made tangible change in the company’s IT structure and provided avenues for new opportunities for the company moving forward.

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Appendix A: Interview Guide

The following Appendix contains sample interview questions. Information about Interviewee consent can be found in Appendix B.

Interview Guide for Copenhagen Cycles' Clients

1. How did you learn about Copenhagen Cycles/Cycling Without Age?
2. Where are you located?
3. What is the size of your chapter?
4. How many trishaws have you purchased from Copenhagen Cycles?
5. How long did it take you to fundraise for the Trishaw purchase?
6. Did you feel supported by CC and CWA during the fundraising process?
7. How was your purchasing experience with Copenhagen Cycles?
8. What was the best part of shopping with Copenhagen Cycles?
9. Would you recommend Copenhagen Cycles to others and why?
10. What advice would you give for other potential buyers?
11. Were there any areas where you could see improvements in their customer outreach process?
12. What would it take to make the experience seamless?

Appendix B: Consent Forms

The following Appendix contains consent forms for all conducted interviews.

Interview Consent Form

We are a group of students from Worcester Polytechnic Institute (WPI) in the United States. We are conducting interviews to learn more about customer experience with Copenhagen Cycles. Your participation is voluntary. If you are willing to participate in this project, please read and note your preferences on this form.

Do we have your permission to record this interview?
Yes □ | No □

Do we have your permission to include your photo?
Yes □ | No □

Will you allow us to include your name and other identifying information?
Yes □ | No □

Will you allow us to use your words for use in our final report?
Yes □ | No □

I understand that these interviews will be published at WPI for educational purposes and made available to the public.

Sign: Print:

Zoom Interview Consent Form

Without recording, we will ask if we have permission to record.
If the participant answers “yes”, then:

[tell the participant the following with the camera/recorder rolling]:

“This project is recording interviews as part of an educational project. By appearing on camera/audio, you are consenting to the use of your image/voice for the purpose of our project which will be published on the WPI website.”

“Please say your name and your title (if applicable).”

[person states name, etc. Then we say]

“We are here on [say the date] to talk about ….” And continue with the interview as scheduled.

At the end of the interview, we can send the recorded interview to them if they want it.

At this point we also ask them if they want to withdraw consent for us to use the video recording.

Appendix C: Final Deliverables

The following Appendix contains the final deliverable mock-ups. The standard operating procedure, the follow-up email, and the sticker design can be found in this appendix.

Trishaw Support Follow-Up Email

Subject: Trishaw Resources from Copenhagen Cycles

Thank you for shopping with Copenhagen Cycles for your newest trishaw purchase! We appreciate your choice to shop with us and hope you are satisfied with your purchase.

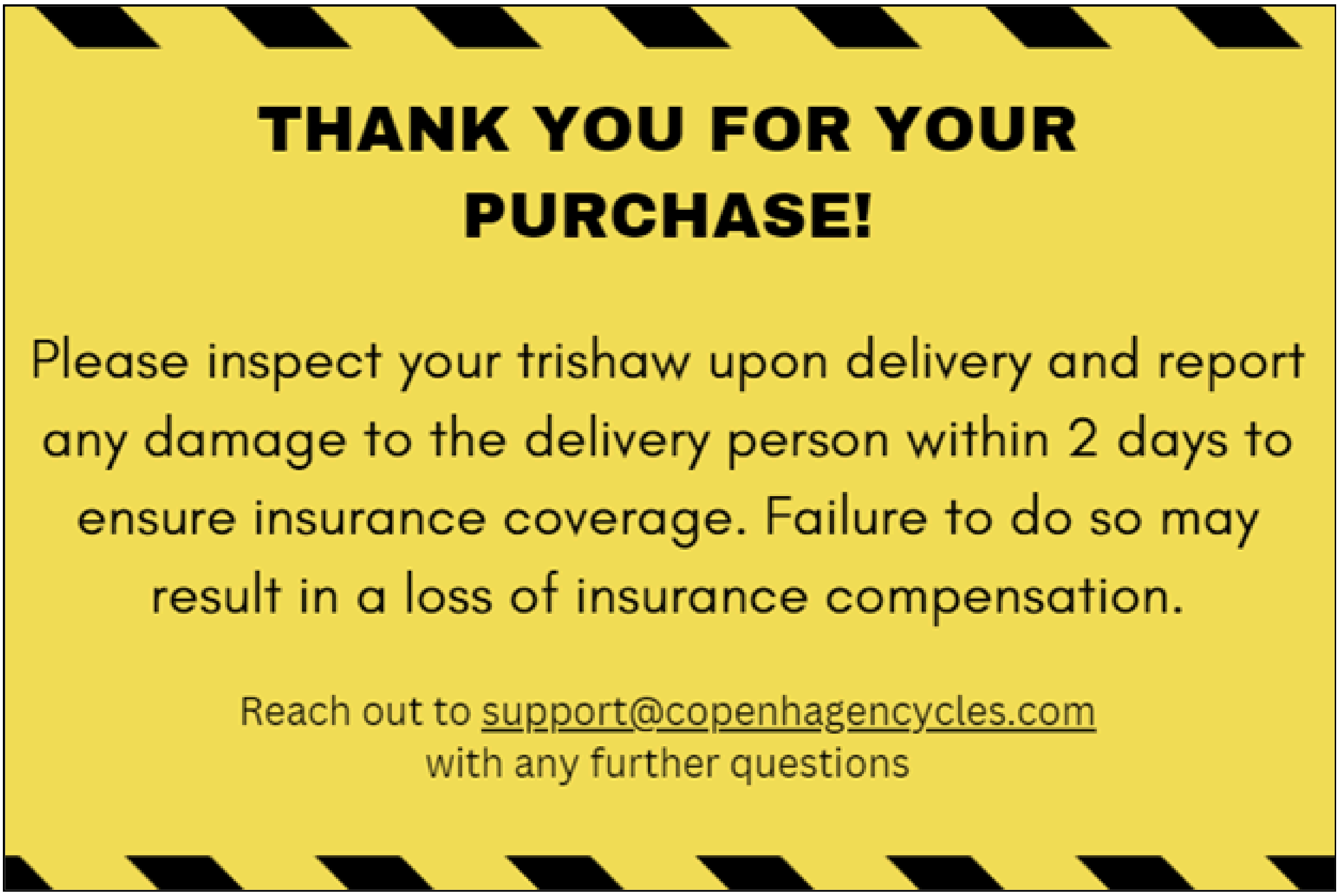
We wanted to remind you to please inspect your trishaw upon delivery and report any damage to the delivery person within two days to ensure insurance coverage. Please reach out to Copenhagen Cycles as well with any questions or concerns regarding the trishaw.

Additionally, we recognize that buying a trishaw is a big purchase and want to ensure that you feel supported before, during, and after the purchase. Below we have included access to the Hood and our FAQ page. The Hood is an online community platform for CWA affiliates to build connections with other chapters and find helpful resources. The FAQ page can be accessed through the Copenhagen Cycles' website and provides technical support if maintenance issues arise.

The Hood : https://thehood.cyclingwithoutage.org/login
FAQ Page : https://copenhagencycles.com/faq/

Sincerely,
Copenhagen Cycles Team

Shipping Sticker with Customer Inspection Statement for WPI Project Team of 2025



Standard Operating Procedure for Copenhagen Cycles

SOP Title	Sales Pipeline and Integrated Platforms Workflow
Contributors	WPI Team 10
Owner	Copenhagen Cycles
Revision Number	001
Effective Date	29/04/2024
Reviewed Date	29/04/2024
Purpose	This SOP aims to outline the sales pipeline and define all integrations and their purposes. It can be used as a reference for the steps in the purchasing process or as a training module for new employees.
Applies To	Employees at Copenhagen Cycles.
Innovate	Distribute knowledge of the purchasing process to all employees at Copenhagen Cycles
Tools and Support	Zendesk Sell, Zendesk Chat, Zendesk Guide, Economic, Make, Podio, Tidio, MailChimp
Key Terminology	Customer: A customer is someone who has interacted as a client with Copenhagen Cycles. A customer can have multiple deals. Deal: A deal is a sales opportunity that is managed through the sales pipeline. A deal can only be assigned to one customer.

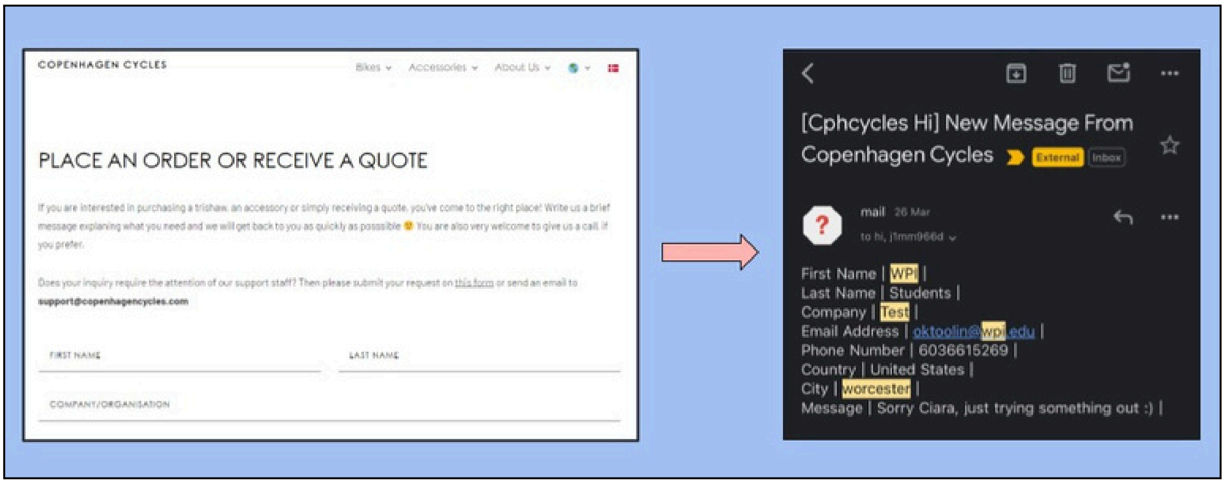
Platforms Description

Integrated Platforms and Overview of Function		
Zendesk Sell	zendesk sell	CRM tool that manages customer engagement, lead management, customer information, and sales optimization.
Zendesk Guide	zendesk guide	CRM support page that can be updated with trishaw support articles and a direct avenue to submit a customer support ticket
Zendesk Chat	zendesk chat	CRM chat box connected with Zendesk Enterprise Suite that can replace Tidio as main point of communication for Copenhagen Cycles' potential customers
E-conomic	e-conomic	The financial platform that generates quotes and stores invoice receipts
MAKE	make formerly Integromat	Platform to automate workflows by linking software together with triggers
Podio	Podio	Sends order confirmation form
Tidio	TIDIO	Chatbox integrated on Copenhagen Cycles website to communicate with potential buyers
MailChimp	mailchimp	Sends out bi-weekly newsletters to subscribers of CWA and Copenhagen Cycles

The Trishaw Purchasing Process

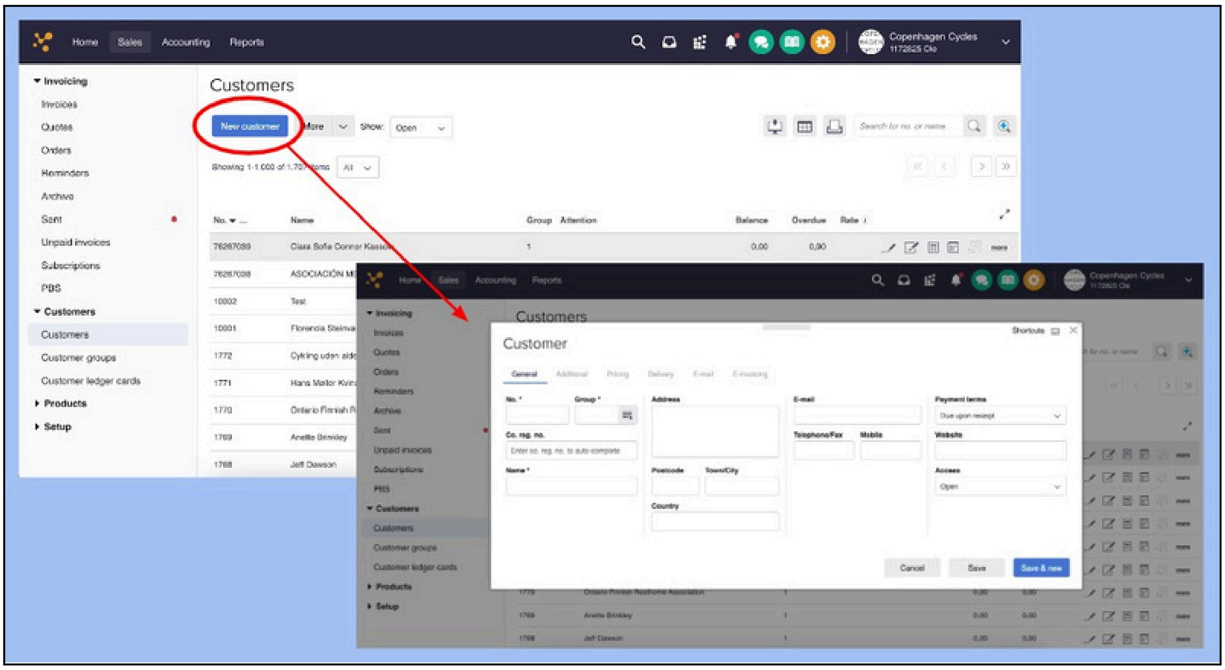
STEP 1: Initiate Contact with Potential Customer

A new Copenhagen Cycles customer will reach out directly by email or through the interest form on the Copenhagen Cycles website, generated by WordPress. If they submit the form, an email will automatically be sent to the rrecipients at hi@copenhagencycles.com with the client details. Below is a screenshot of the details received from the interest form.

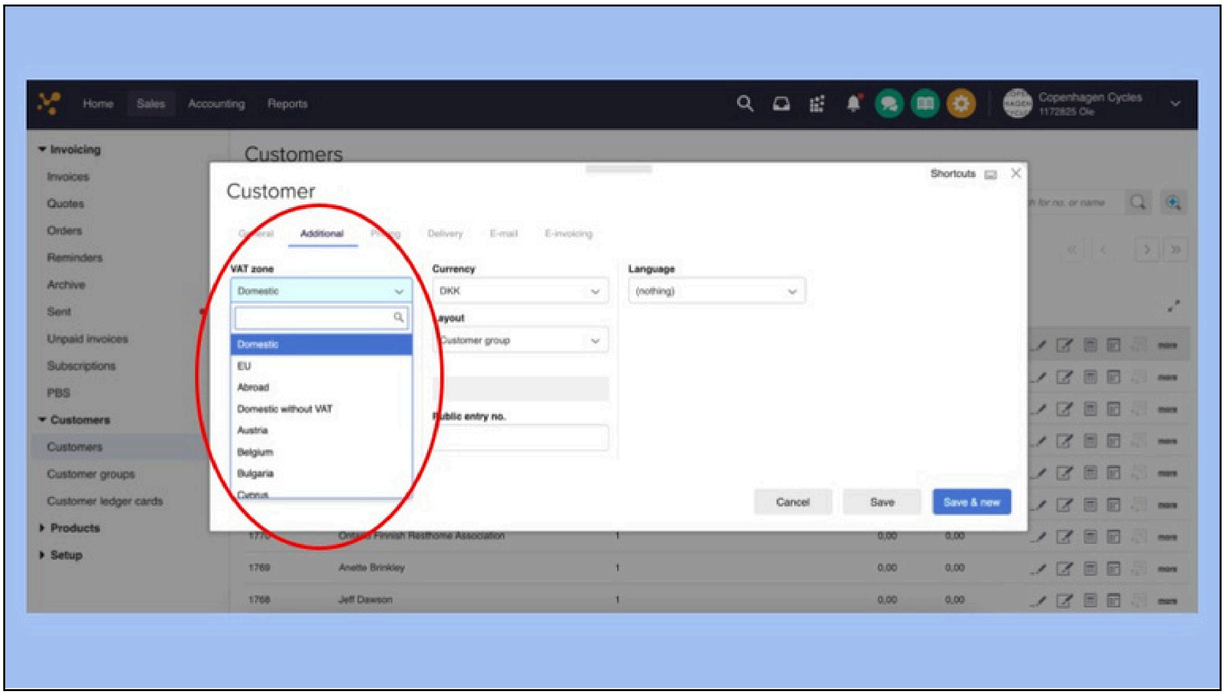


STEP 2: Log in a New Customer Account

After gathering the information on the client, an employee will log the information under a new customer account in E-conomic. To navigate to a new customer account: Home > Sales > Customer >New Customer. Information for General tab, Additional tab and Delivery tab are filled out.

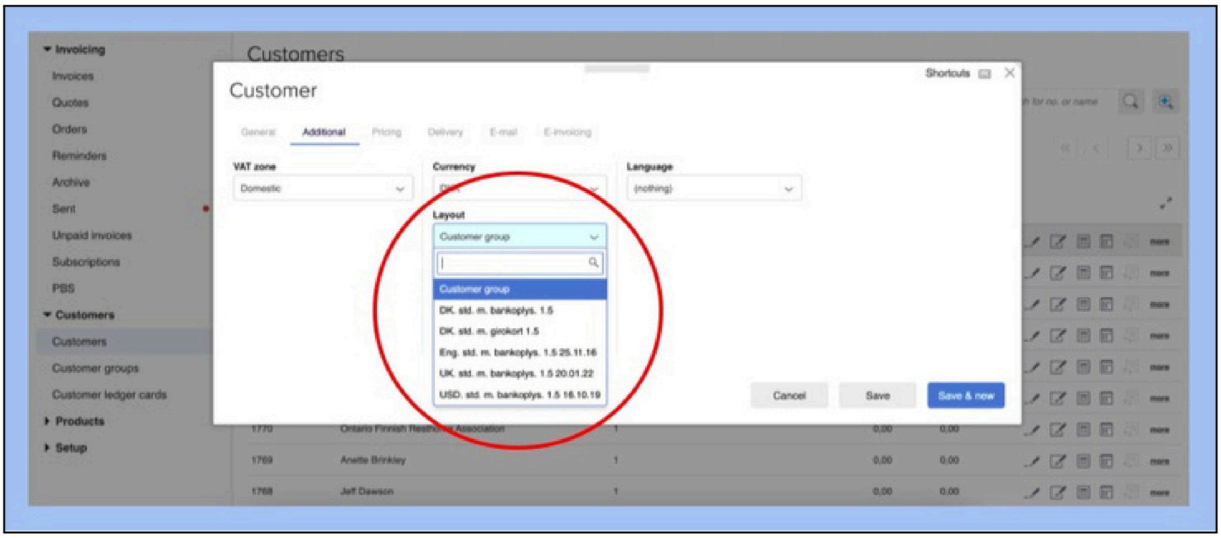


Under the Additional tab, it is important to correctly choose the VAT zone. If it is a client in Denmark, choose Domestic. If it is anywhere outside the EU, choose Abroad. If it is in the EU, choose the specific country of the client. Hit "Save & new."

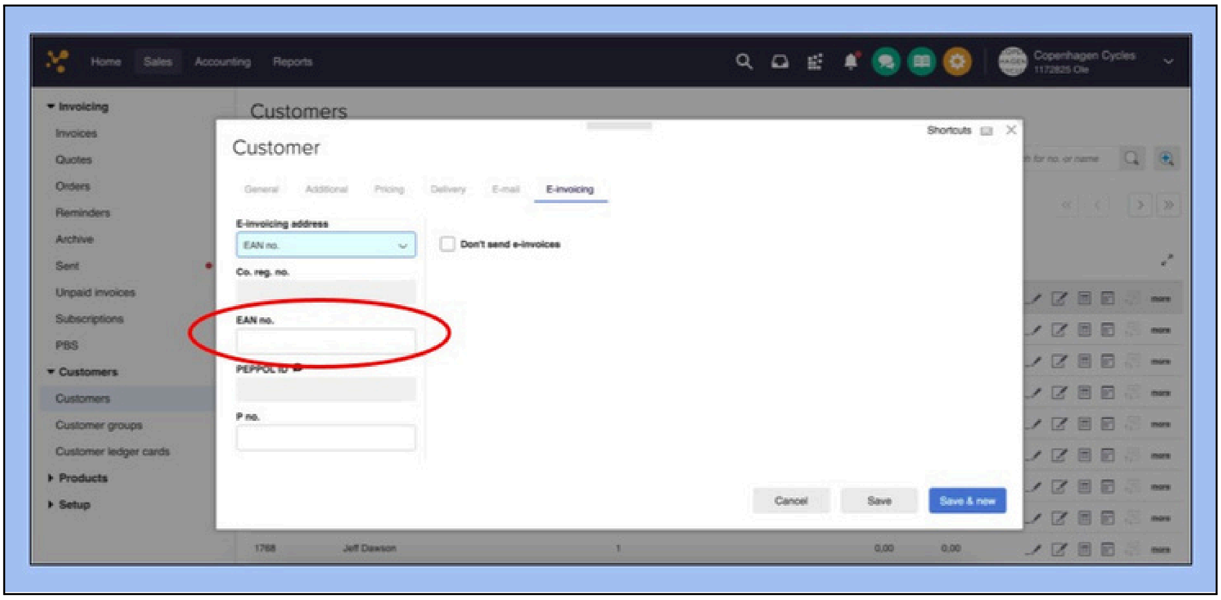


Under the Additional tab, Currency and Layout must also be filled. Layout must be selected as follows.

Purchases in Denmark : **DK. std. M. bankoplys. 1.5.**
Purchases in the UK : **UK. std. M. bankoplys. 1.5.20.01.22**
Purchases in the United States: **USD. std. M bankoplys. 1.5.16.10.19**
Purchases in any other countries: **Eng. std. M. bankoplys. 1.5.25.11.16**

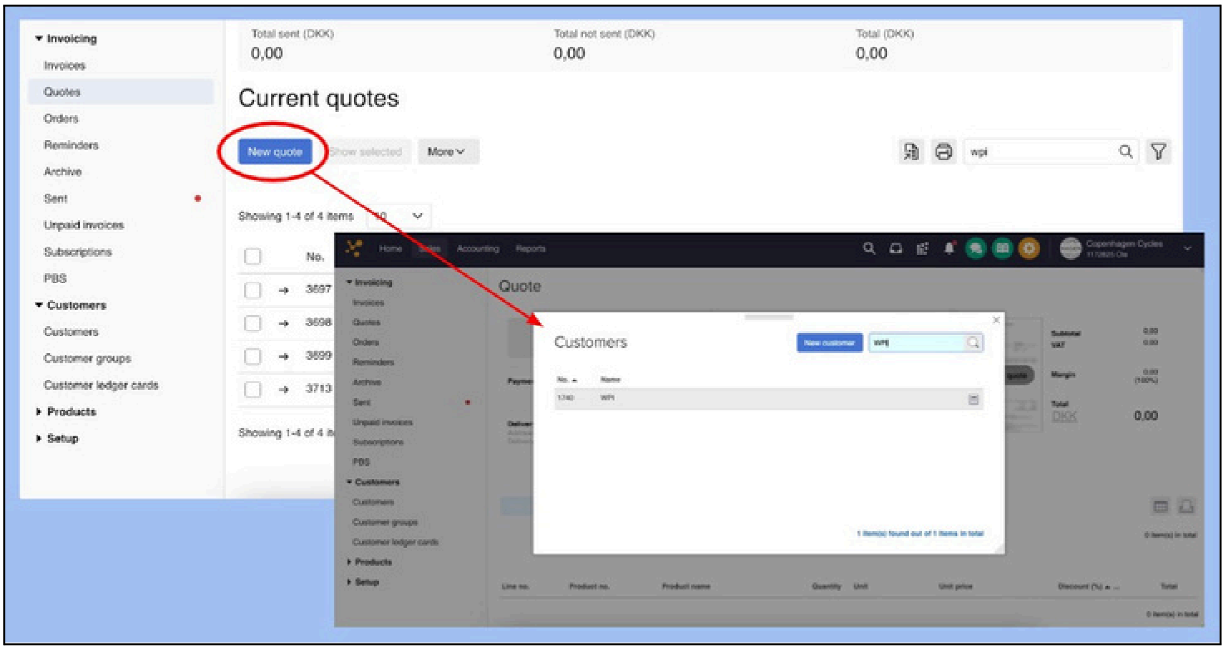


Note: Danish Institutions (i.e. Care Homes) will need the EAN number filled in which can be found under the E-invoicing tab displayed below.

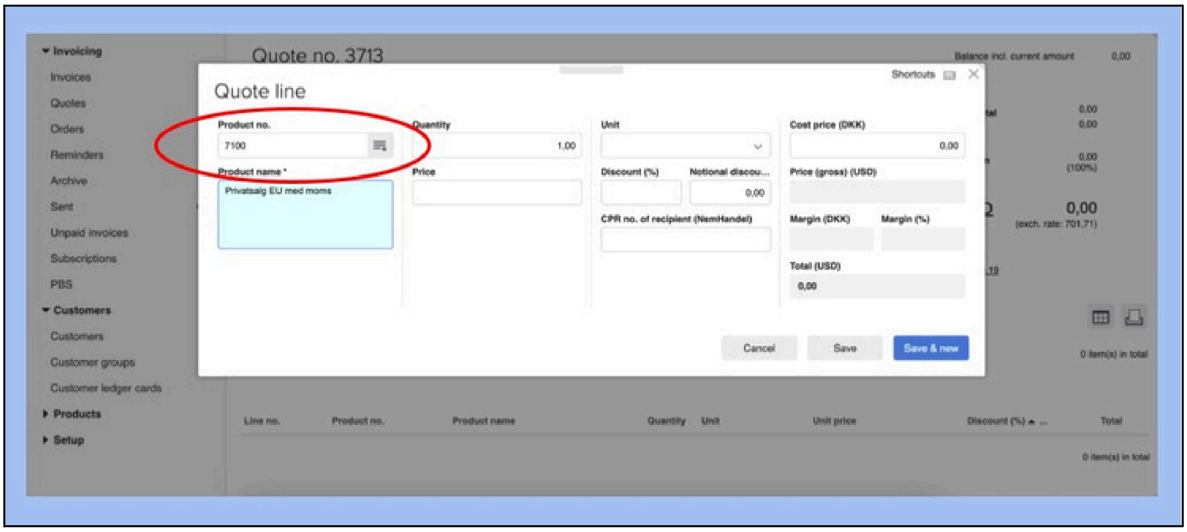


STEP 3: Create Quote for Customer

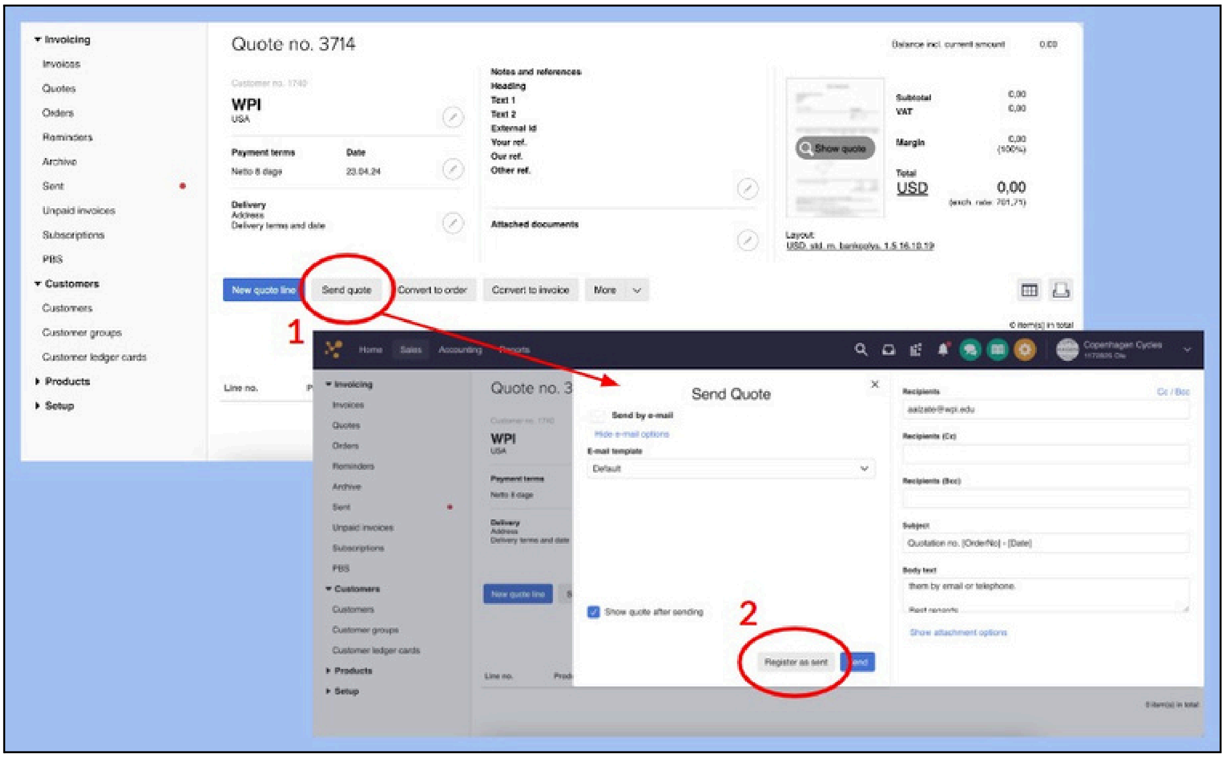
The employee will then create a new quote from the customer account. Navigate to: Invoicing > Quotes > New Quote. After pressing “new quote”, the employee will be prompted to select a customer. The client can be found by typing the customer name or number.



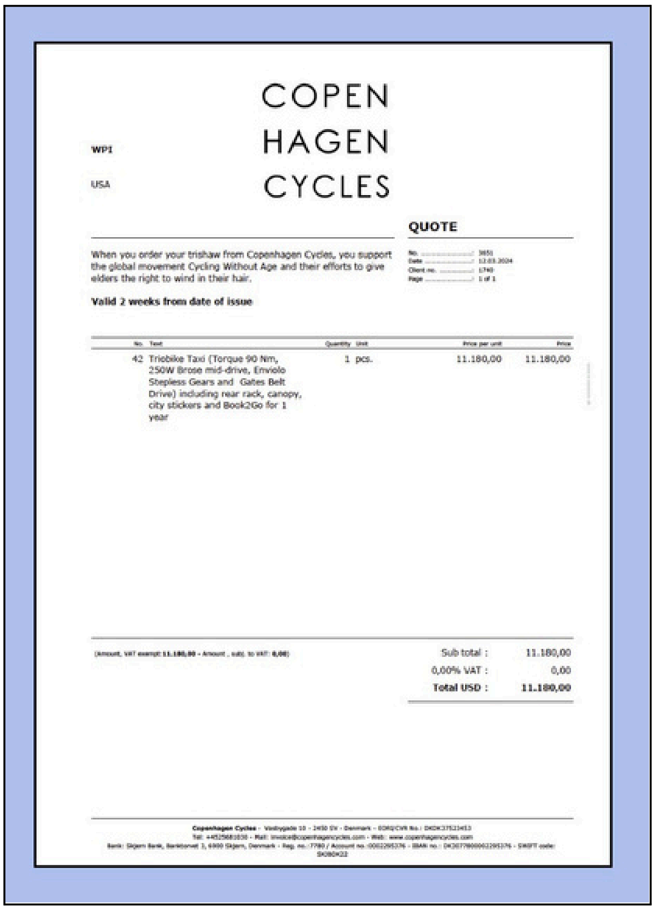
Note: When creating a quote for any country in the EU except for Denmark, the Product Number will be **7100** for all products in the quote. This ensures that the VAT percentage is correct.



Once the quote is generated, press the “Send quote” button and then press the “Register as sent” button to save the quote in E-conomic.



The screen capture below is a sample quote that has been generated.



WPI

USA

COPEN HAGEN CYCLES

QUOTE

When you order your trishaw from Copenhagen Cycles, you support the global movement Cycling Without Age and their efforts to give elders the right to wind in their hair.

No. 3651
Date 12.03.2024
Client no. 1740
Page .... 1 of 1

Valid 2 weeks from date of issue

No.	Text	Quantity	Unit	Price per unit	Price
42	Triobike Taxi (Torque 90 Nm, 250W Brose mid-drive, Enviolo Stepless Gears and Gates Belt Drive) including rear rack, canopy, city stickers and Book2Go for 1 year	1	pcs.	11.180,00	11.180,00

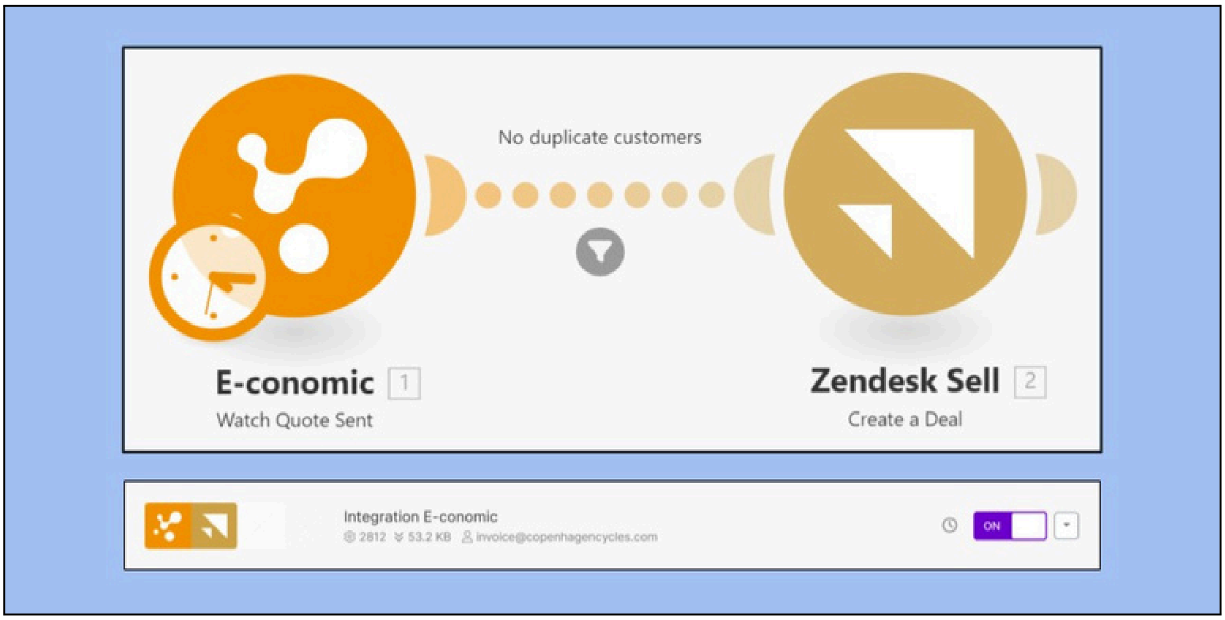
(Amount, VAT exempt: **11.180,00** - Amount , subj. to VAT: **0,00**)

Sub total :	11.180,00
0,00% VAT :	0,00
Total USD :	**11.180,00**

Copenhagen Cycles - Vasbygade 10 - 2450 SV - Denmark

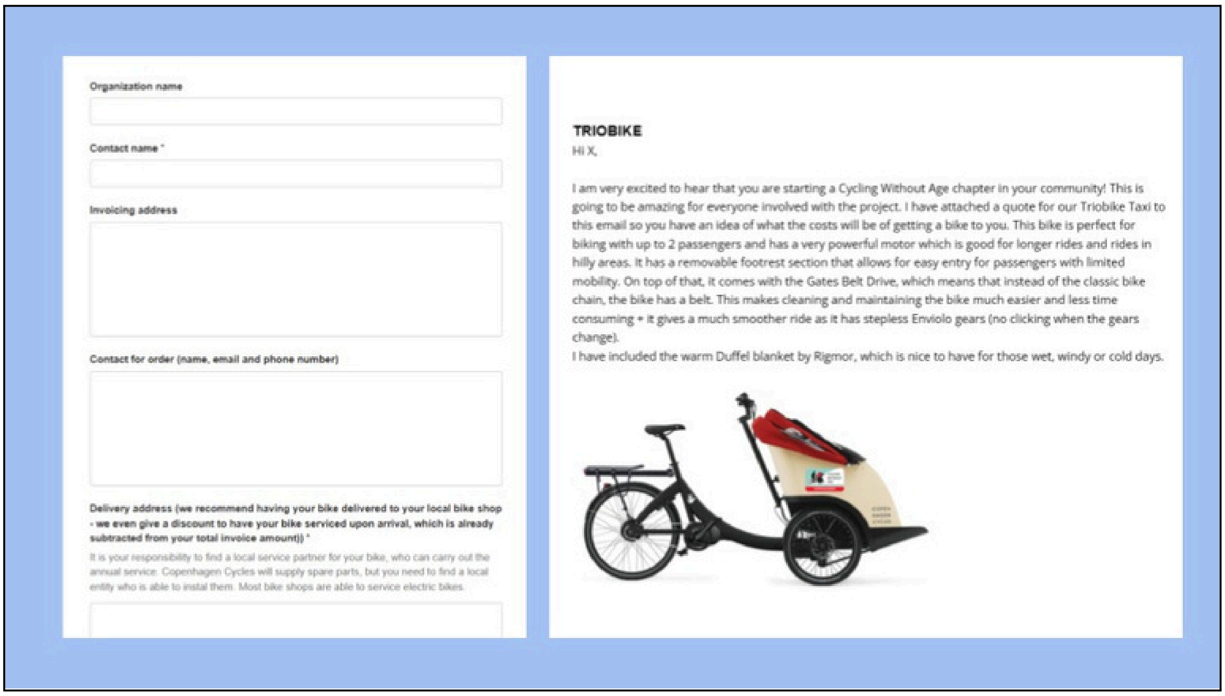
STEP 4: Quote Creation Triggered New Deal in Zendesk Sell using Make

After the quote is created, a software integration in Make triggers the creation of a new deal in Zendesk Sell. This integration watches for new quotes being created, and automatically creates a deal with their personal information and updates the deal status to “quote sent” status in the Zendesk Sales Pipeline. This integration is currently set to ON, automatically inputting this information into the Zendesk Sell database.



STEP 5: Follow-up Email to the Client

Following the creation of the deal, an employee follows up with the potential client in an email containing a PDF of the quote and the link to the order form generated by Podio. The employee will prompt them to fill out the form when they are ready to purchase. The script for the email generated can be found here.The screen capture below shows the Podio order confirmation form on the left and a draft of the customer email on the right.



Organization name

Contact name *

Invoicing address

Contact for order (name, email and phone number)

Delivery address (we recommend having your bike delivered to your local bike shop - we even give a discount to have your bike serviced upon arrival, which is already subtracted from your total invoice amount)) *

It is your responsibility to find a local service partner for your bike, who can carry out the annual service. Copenhagen Cycles will supply spare parts, but you need to find a local entity who is able to instal them. Most bike shops are able to service electric bikes.

TRIOBIKE

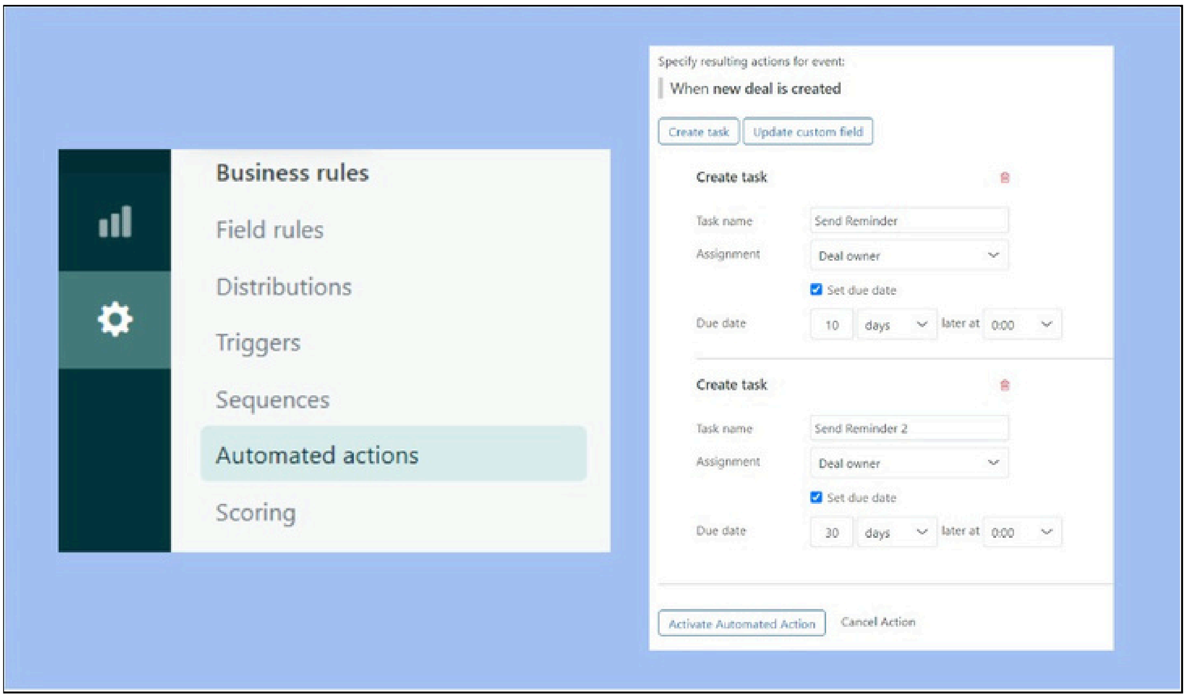
Hi X,

I am very excited to hear that you are starting a Cycling Without Age chapter in your community! This is going to be amazing for everyone involved with the project. I have attached a quote for our Triobike Taxi to this email so you have an idea of what the costs will be of getting a bike to you. This bike is perfect for biking with up to 2 passengers and has a very powerful motor which is good for longer rides and rides in hilly areas. It has a removable footrest section that allows for easy entry for passengers with limited mobility. On top of that, it comes with the Gates Belt Drive, which means that instead of the classic bike chain, the bike has a belt. This makes cleaning and maintaining the bike much easier and less time consuming + it gives a much smoother ride as it has stepless Enviolo gears (no clicking when the gears change).

I have included the warm Duffel blanket by Rigmor, which is nice to have for those wet, windy or cold days.

ACTIVE: Task Reminders

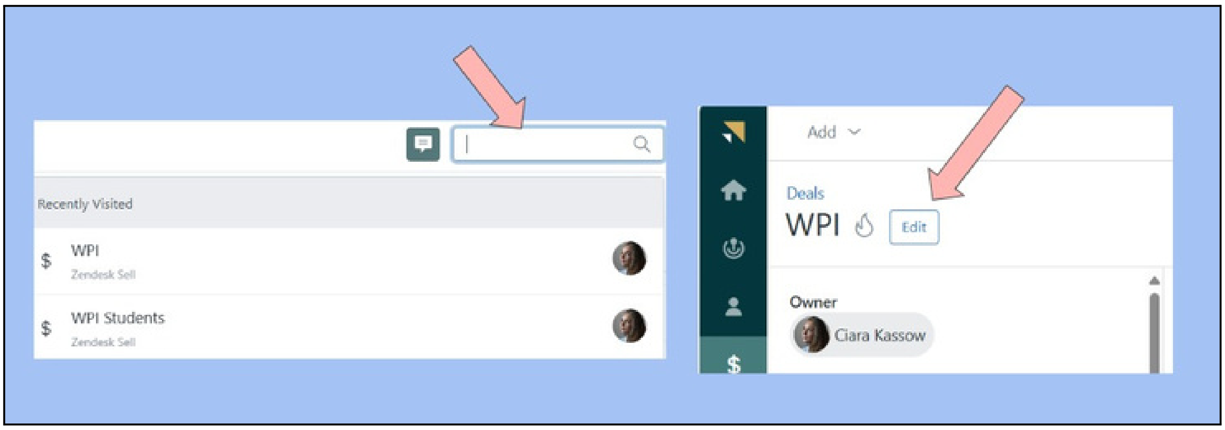
The purchasing process can often take three to eight months depending on the status of fundraising. During this time, it is beneficial to stay in contact with the customer to ensure the sale is retained. To maximize the potential of Zendesk, task reminders have been created and activated using automated actions. These tasks provide reminders for follow-ups to sales while the employee waits for the order form to be completed. These notifications can be updated as needed by Copenhagen Cycles under the Automated Actions tab which can be found under Settings. The image below depicts how to navigate to automated actions in Zendesk.



STEP 6: Order Confirmation & Update Deal in Zendesk

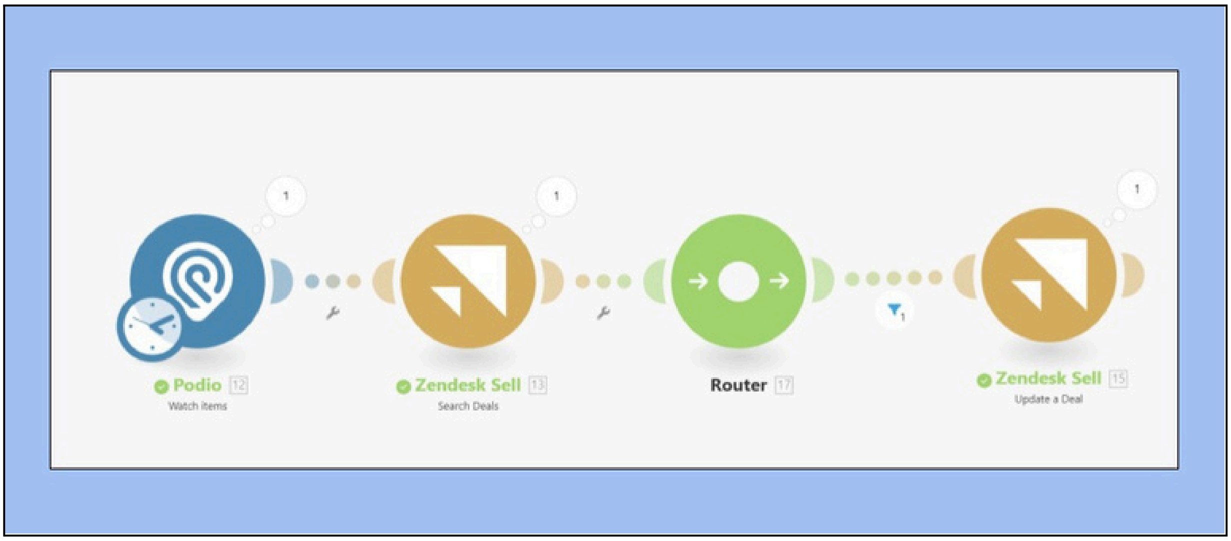
The customer completes the order form and the information is populated in Podio under the order confirmation tab.

An employee will then confirm the details from the form and manually update the previously created deal on Zendesk Sell with the necessary information for the trishaw shipment. The deal can be found by searching its name in Zendesk Sell and clicking the edit button.

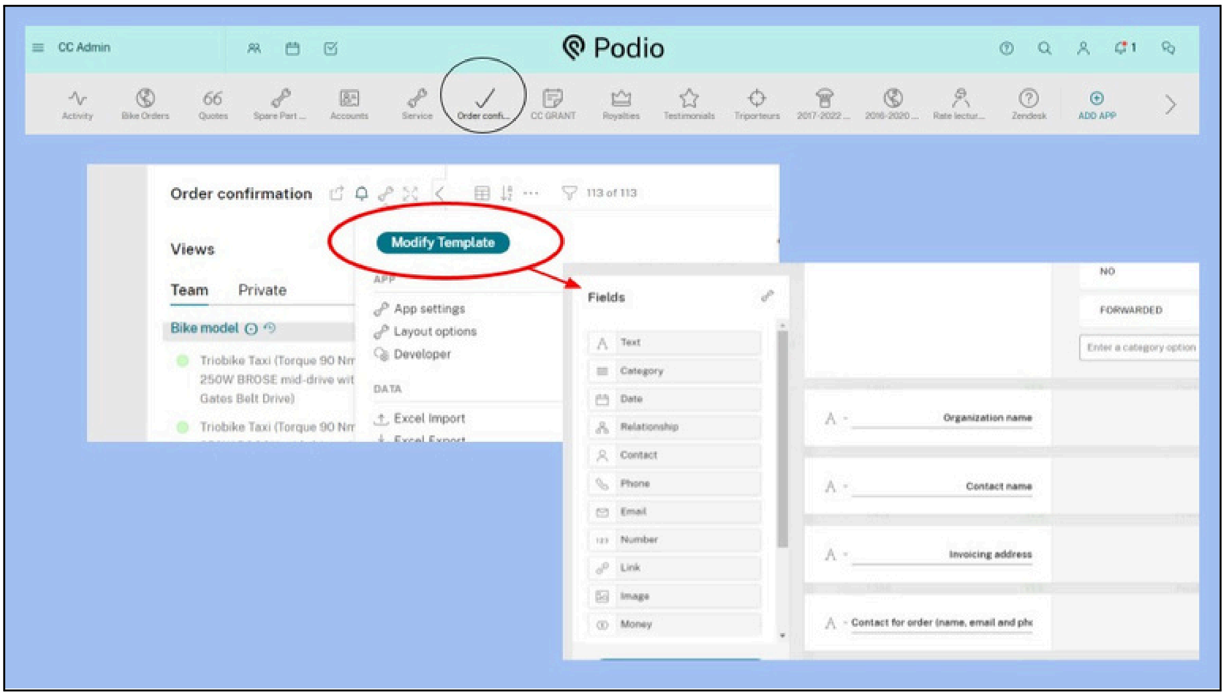


INACTIVE: Integration for Updating Deal

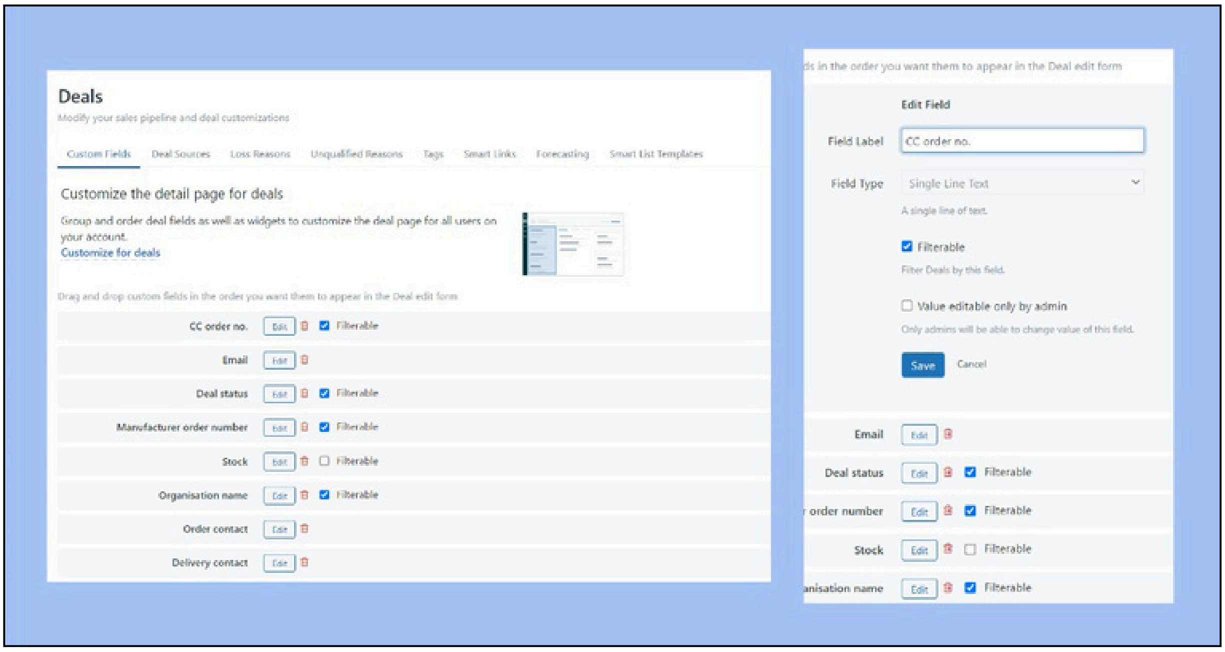
An integration has been started to transfer the order form information from Podio into Zendesk Sell and directly update the deal. However, because the elements of the Podio form and the Zendesk Sell deal entry form are incompatible, only specific elements will transfer. The current integration setup only transfers the organization name, delivery contact, delivery address, bike sticker title, and the EORI/EAN/VAT number. This is not all of the available form information, therefore, some customer data would still need manual input. This integration also updates the status of the deal from “quote sent” to “deal won” to better automate the sales pipeline in Zendesk Sell.



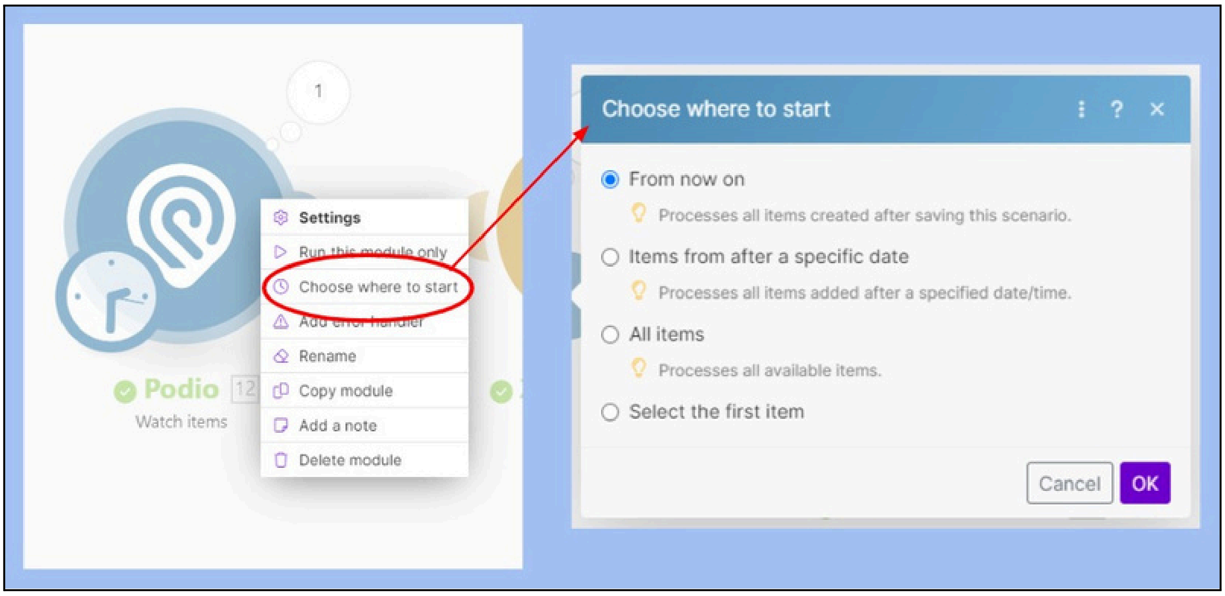
If looking to enable this integration for all fields to be transferred, the Order Confirmation form in Podio must be edited so that the fields in Podio match the fields in Zendesk. The screen capture below depicts how to navigate to the field types in the Podio order form.



The field types for a Zendesk Deal can be revised under Settings > Customize > Deals > Custom Fields. The screen capture below depicts how to navigate to the field types in Zendesk Sell.

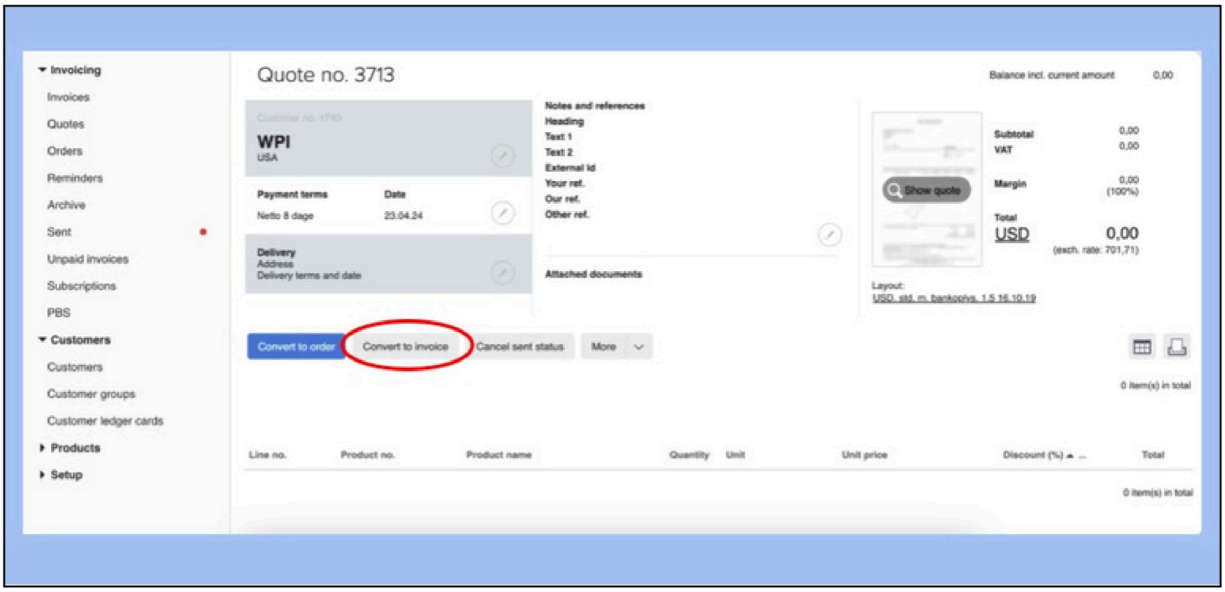


Additionally, the Make integration still requires testing in the "Bundle" section of the trigger, which specifies the responses to look for. The image below depicts the starting section, which should also be revised after updating the fields. For testing, we chose the "Select the first item" selection, but it is advised to choose the "All items" option when the final scenario goes live.



STEP 7: Quote is Converted to Invoice

Following the completion of the form in Podio, the quote in E-conomic is converted to an invoice. Navigate to the quote and press "Convert to Invoice."



STEP 8: Invoice Sent and Customer Payment

After the invoice is created in E-conomic, the employee in charge of the sale emails the invoice which contains an overview of the different payment types and next steps. If the deal has not been updated in Zendesk as “deal won”, at this time, update the deal to “deal won.” The purchasing process comes to an end once payment is received. The screen capture below depicts a draft of the invoice which is sent to the client.


COPEN
HAGEN
CYCLES

INVOICE

Thank you for your purchase! By buying your Cycling Without Age trishaw from Copenhagen Cycles, you support our pledge to donate all profits to Cycling Without Age.

Make sure to read the manuals and train all pilots at:
http://cyclingwithoutage.org/the-pilot

42 Trebike Taxi (Torque 90 Nm, 250W Brose mid-drive, Enviolo Stepless Gears and Gates Belt Drive) including rear rack, canopy, city stickers and Book2Go for 1 year | 1 pcs. | 11.180,00 | 11.180,00

Sub total : 11.180,00
0,00% VAT : 0,00
Total USD : 11.180,00

Terms of payment: **Net 8 days - Final payment date 20.03.2024**

We offer a 2 year warranty on all bikes.

DRAFT

STEP 9: Follow-Up Email After Trishaw Shipment

After the trishaw has been delivered, a follow-up email should be sent to the client to remind them of important support links after the purchasing process has ended. Below is a template for the proposed email.

Subject: Trishaw Resources from Copenhagen Cycles

Thank you for shopping with Copenhagen Cycles for your newest trishaw purchase! We appreciate your choice to shop with us and hope you are satisfied with your purchase.

We wanted to remind you to please inspect your trishaw upon delivery and report any damage to the delivery person within two days to ensure insurance coverage. Please reach out to Copenhagen Cycles as well with any questions or concerns regarding the trishaw.

Additionally, we recognize that buying a trishaw is a big purchase and want to ensure that you feel supported before, during, and after the purchase. Below we have included access to the Hood and our FAQ page. The Hood is an online community platform for CWA affiliates to build connections with other chapters and find helpful resources. The FAQ page can be accessed through the Copenhagen Cycles' website and provides technical support if maintenance issues arise.

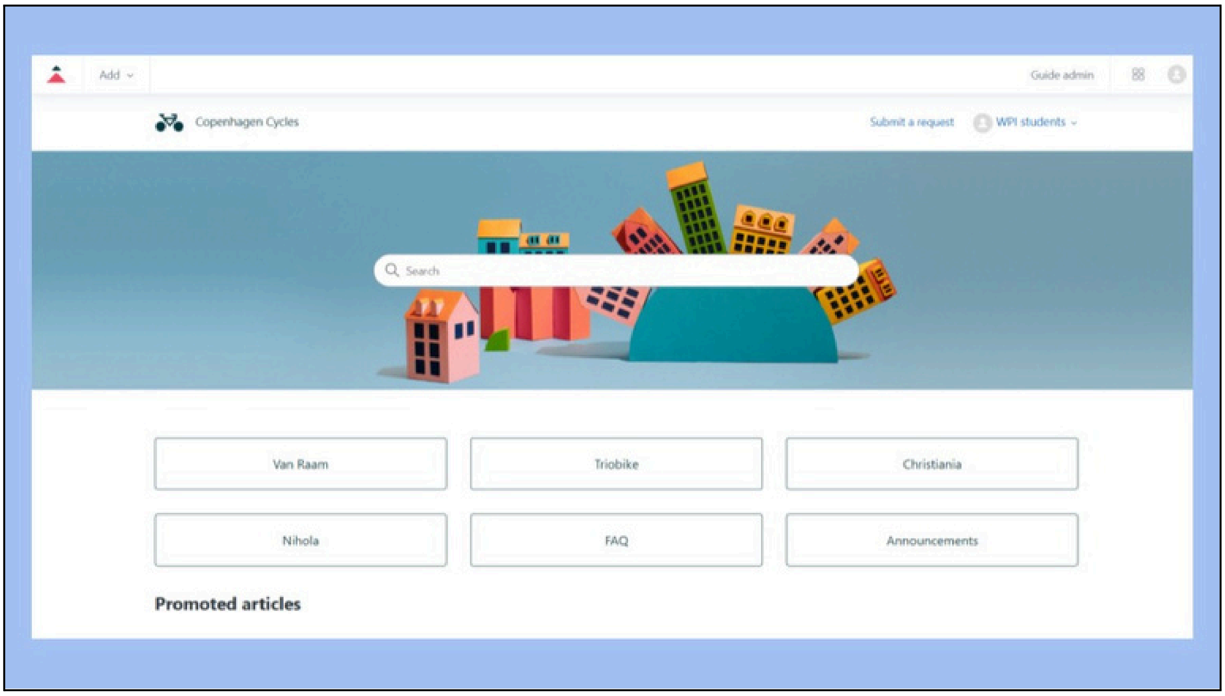
The Hood : https://thehood.cyclingwithoutage.org/login
FAQ Page : https://copenhagencycles.com/faq/

Sincerely,
Copenhagen Cycles Team

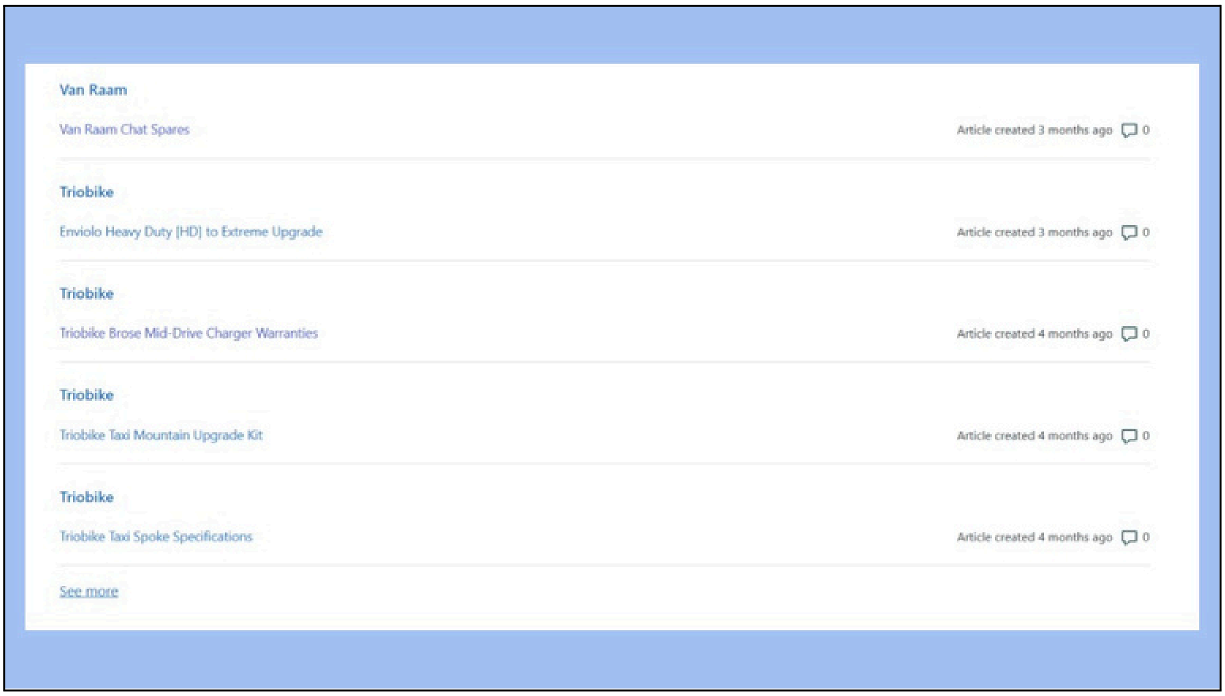
Additional Integrations in Zendesk

Updating Zendesk Guide

At Copenhagen Cycles, Zendesk Sell has since been upgraded to Zendesk Enterprise Suite allowing for the addition of Zendesk Chat, Guide, Talk and a Sandbox environment. The platform Zendesk Guide is a support hub directly linked to the Zendesk Enterprise Suite. Below is the user interface of the site which can be accessed here.

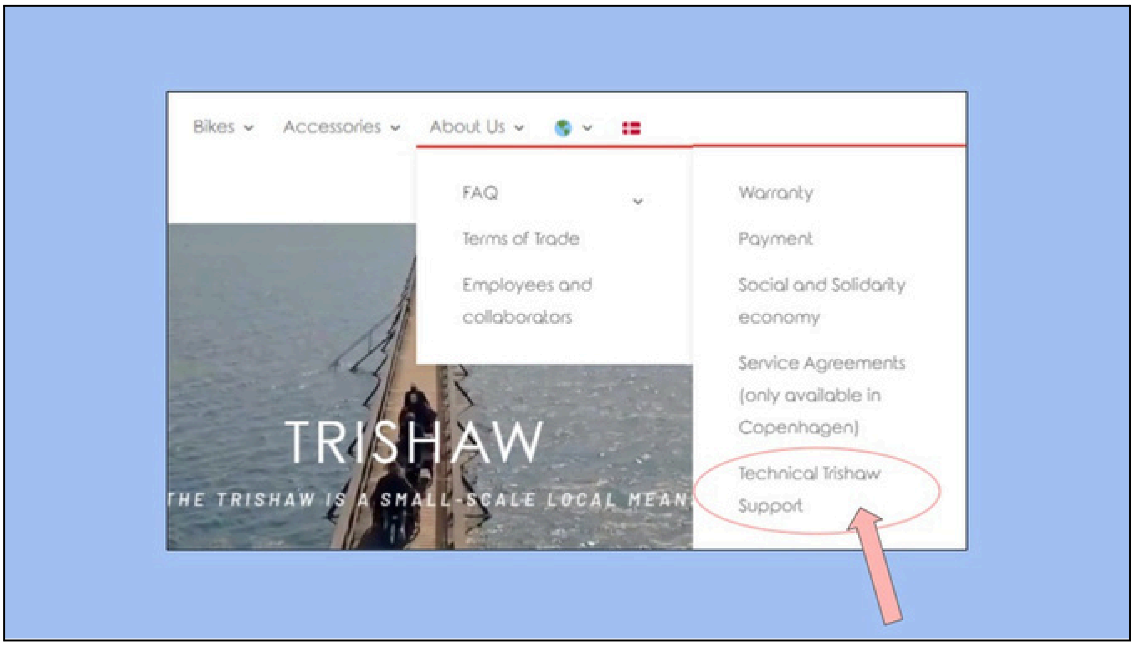


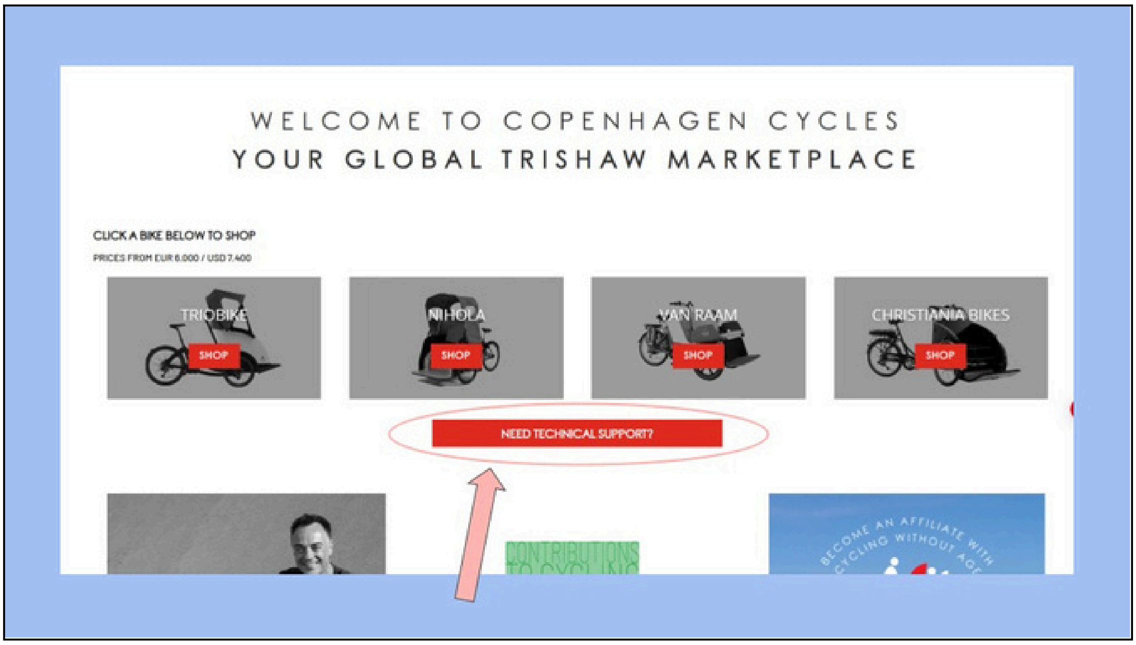
Zendesk Guide hosts articles written by employees at Copenhagen Cycles to answer specific questions concerning trishaw support. It is beneficial for Copenhagen Cycles operations to continue updating this site as more trishaw questions are received in order to help and support trishaw owners if technical issues arise. Below is the list of articles created and posted by Oliver Gaite, the technical support mechanic.



Additionally, a support ticket can be created directly from the website.

The trishaw support resources are linked in two locations on the Copenhagen Cycles' website shown below.

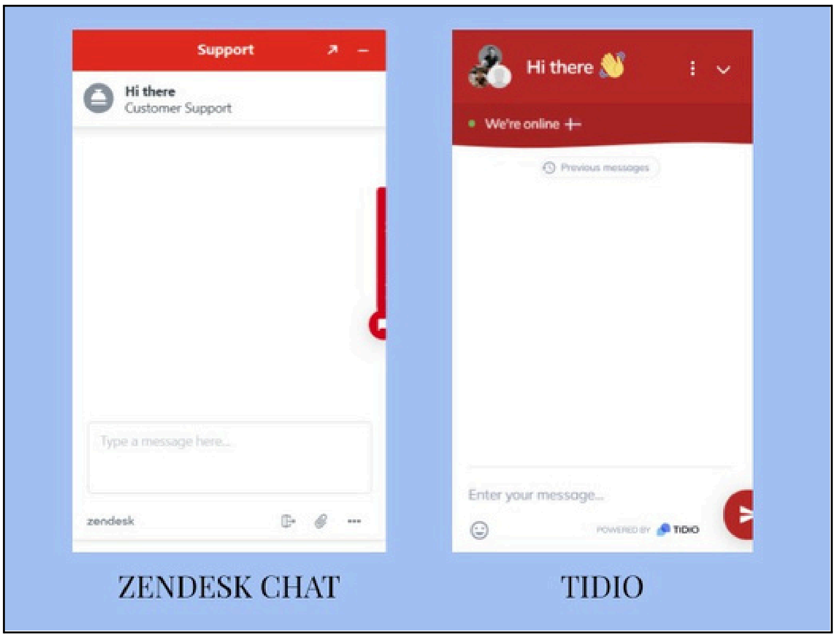

Bikes
Accessories
About Us
FAQ
Terms of Trade
Employees and collaborators
Warranty
Payment
Social and Solidarity economy
Service Agreements (only available in Copenhagen)
Technical Trishaw Support
TRISHAW


WELCOME TO COPENHAGEN CYCLES
YOUR GLOBAL TRISHAW MARKETPLACE
CLICK A BIKE BELOW TO SHOP
TRIOBIKE
SHOP
NIHOLA
SHOP
VAN RAAM
SHOP
CHRISTIANIA BIKES
SHOP
NEED TECHNICAL SUPPORT?

Transition from Tidio to Zendesk Chat

There is a possibility to remove the use of Tidio as the chatbot service offered on Copenhagen Cycles' website, helping to consolidate the CRM landscape and reduce expenses. A transition to utilize Zendesk Chat has been enabled with the Zendesk Enterprise Suite mentioned above.

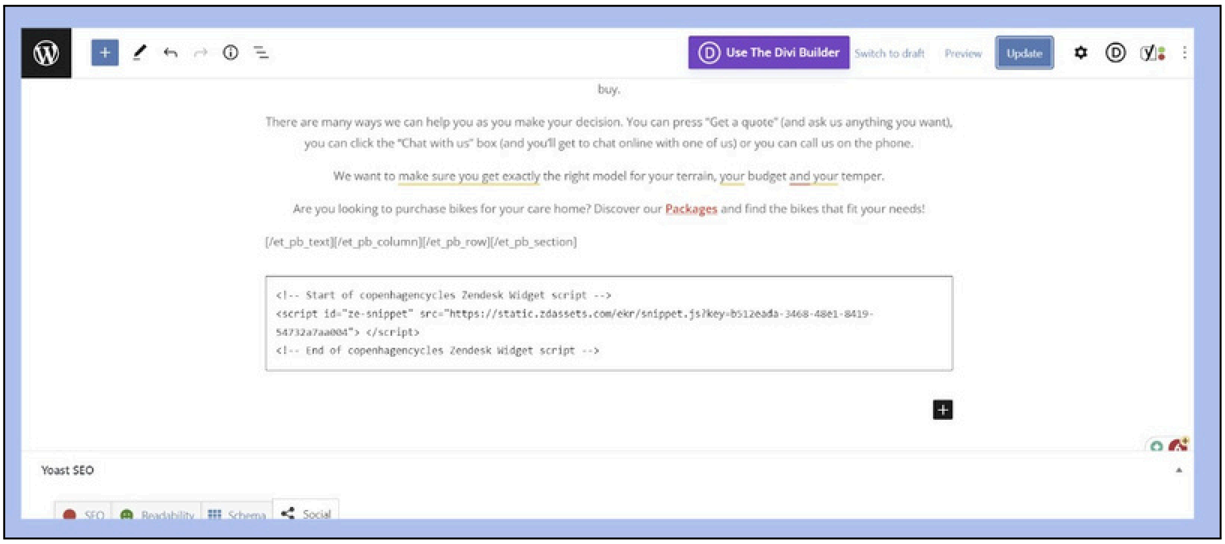
Because this integration requires permanent changes in the software landscape, this SOP covers the steps to integrate Zendesk Chat into the operations if Copenhagen Cycles wishes to move forward with the elimination of Tidio. The picture below depicts the two chat box options, Zendesk Chat on the left and Tidio Chat on the right.



<u>Rendering Zendesk Chat on the Copenhagen Cycles Website</u>

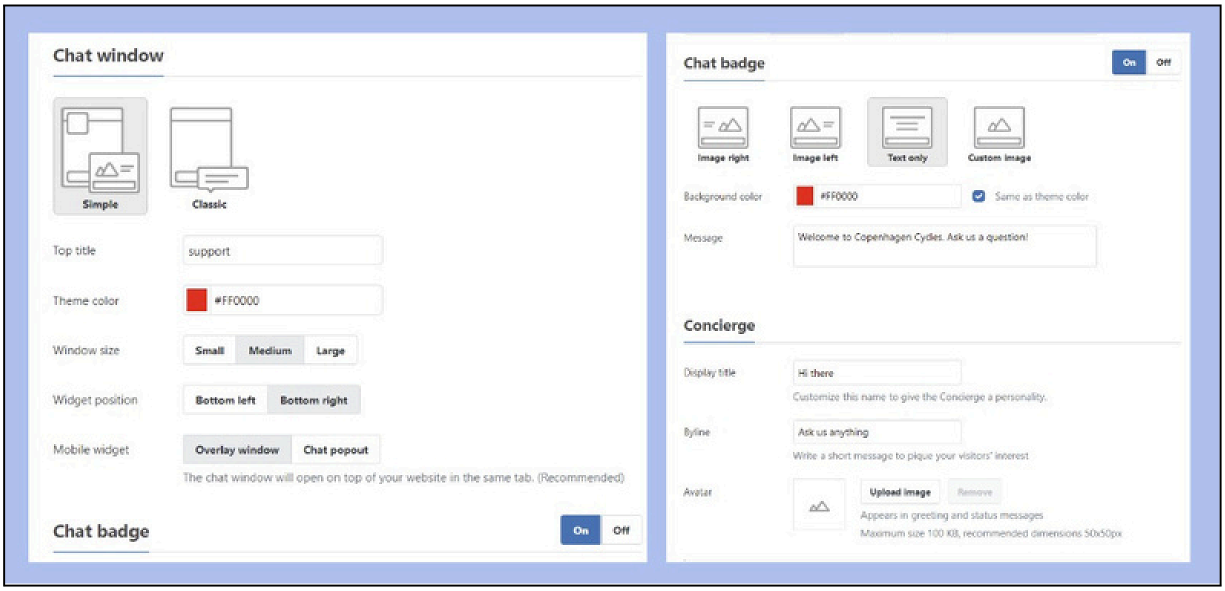
On Zendesk Chat under Settings > Widget > Getting Started,copy the provided code. This code can then be pasted in every page of the Copenhagen Cycles that requires the chat box to be displayed.

To navigate to the website script: WordPress website editor > Pages >*Select specific page to render chat box on.* Then hit the blue + symbol in the top left corner and add *<code>* from the menu options. As seen in the image below, paste the HTML code into the box and press *Edit as HTML*. Then, press the green save button in the bottom right corner. Once the changes are accepted, the chat box will be rendered on the Copenhagen Cycles website allowing customers to interact with the management team. To remove the chat box, the HTML code box can be deleted from the website page. Once the change has been saved, the chat box will disappear from the website.



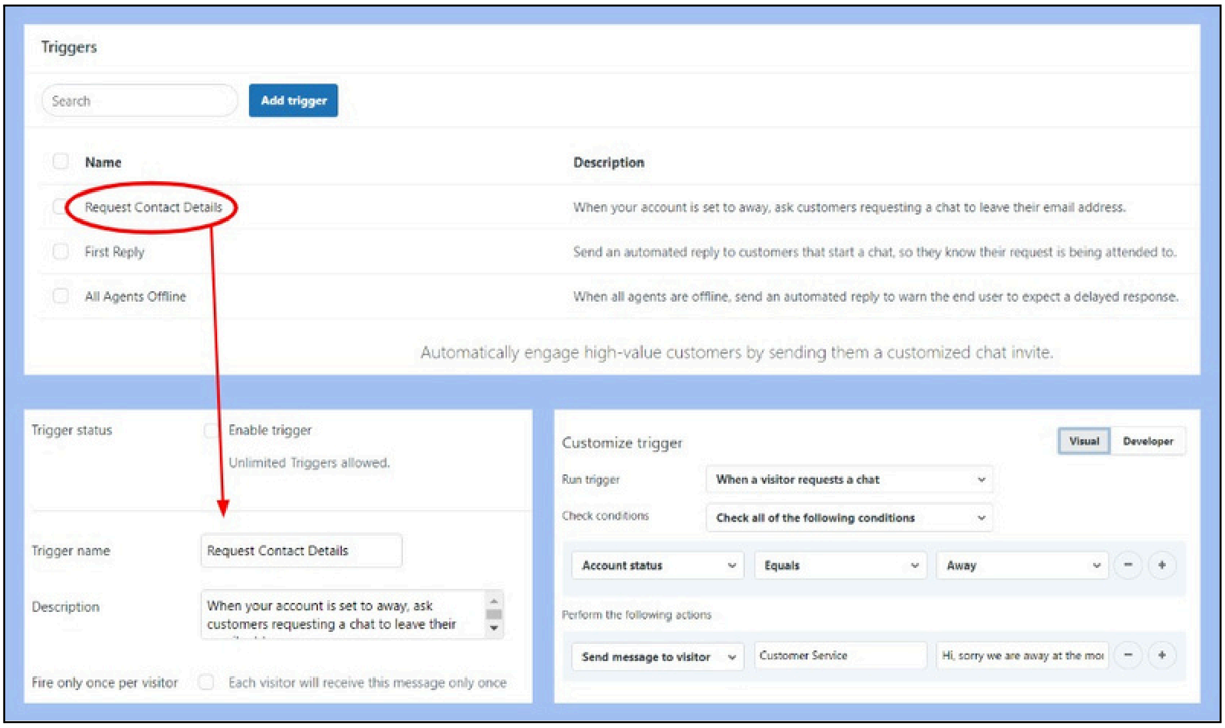
Customizing the Chat Window in Zendesk Chat

As seen in the figure below, the chat window can be customized based on color, size, position, and other details. This window can be located by navigating to Zendesk Chat Home > Settings > Widget > Appearance.Hit the blue "Save Changes" button to render on the Copenhagen Cycles WordPress Website.



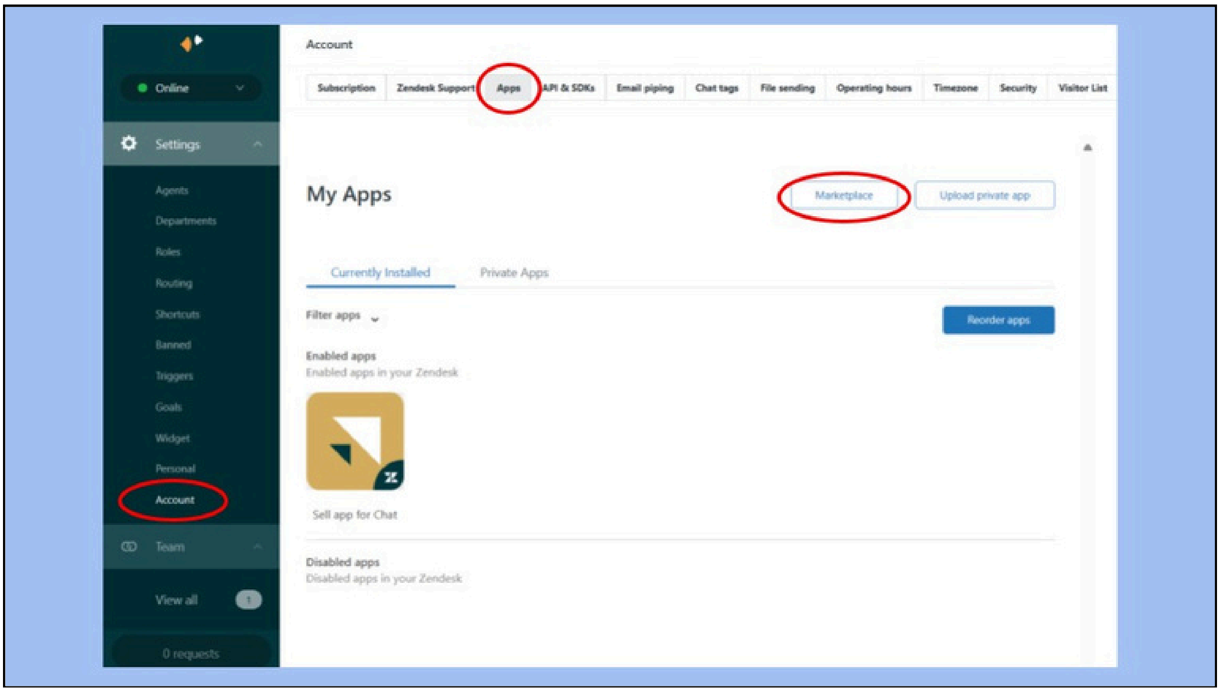
Triggers on Zendesk Chat

Possible automations can be generated through a variety of triggers.In Zendesk Chat, under Settings > Triggers, employees can set up different triggers that guide the customer across the chatting process or generate automatic responses when they are not available. There are currently three sample setups put in place as examples.



Additional Apps on Zendesk Chat

For additional resources on integrated AI features in Zendesk Chat, navigate to Settings > Account >Apps > Marketplace on Zendesk Chat. The marketplace incorporates thousands of add-ons to the Zendesk Chat setup. Possible additions could involve AI Chatbots or models for personalized responses. Because the add-ons tend to incur an additional fee, it is to the discretion of Copenhagen Cycles to weigh the possible benefits of these investments.


Account
Online
Settings
Agents
Departments
Roles
Routing
Shortcuts
Banned
Triggers
Goals
Widget
Personal
Account
Team
View all
0 requests
Subscription
Zendesk Support
Apps
API & SDKs
Email piping
Chat tags
File sending
Operating hours
Timezone
Security
Visitor List
My Apps
Marketplace
Upload private app
Currently Installed
Private Apps
Filter apps
Reorder apps
Enabled apps
Enabled apps in your Zendesk
Sell app for Chat
Disabled apps
Disabled apps in your Zendesk

Supplemental Material

Flow Chart of Purchasing Process

The chart below is a flow chart depicting the purchasing process. The blue squares indicate areas of the workflow to keep manual, and the purple circles represent specific tasks to be completed by the user. The stars represent areas that can be optimized on Zendesk.