

HOW TO CHOOSE A CUSTOMER SUPPORT SOFTWARE

Evaluating the right provider
for your business



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HOW TO CHOOSE A CUSTOMER SUPPORT SOFTWARE

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When it comes to selecting your customer support software, there are many providers to choose from. It can be challenging to pick the one that best suits your business. While it comes down to your business policies and customer support agents to provide excellent customer service, the right support software will equip you with the necessary tools to deliver excellent support and keep your customers happy.

This eBook, **How to Choose a Customer Support Provider**, walks you through the different areas of consideration to ensure you cover all the bases before making a decision.

When it comes to choosing a support software, there are three key angles to consider:

- 1. Customer experience**
- 2. Agent experience**
- 3. Business need**

CHAPTER

01

CUSTOMER EXPERIENCE



CUSTOMER EXPERIENCE

01

In your support software selection process, you have to start with your customer. Put them at the core of your decision because ultimately, the provider you partner with is going to have a significant impact on the overall customer experience.

- 70% of [purchasing experiences are based on how the customer feels like they're being treated.](#)
- A customer is [four times more likely to go to a competitor if they have a bad customer experience, compared when the experience is related to price or product.](#)

Consider the next customer experience factors -->

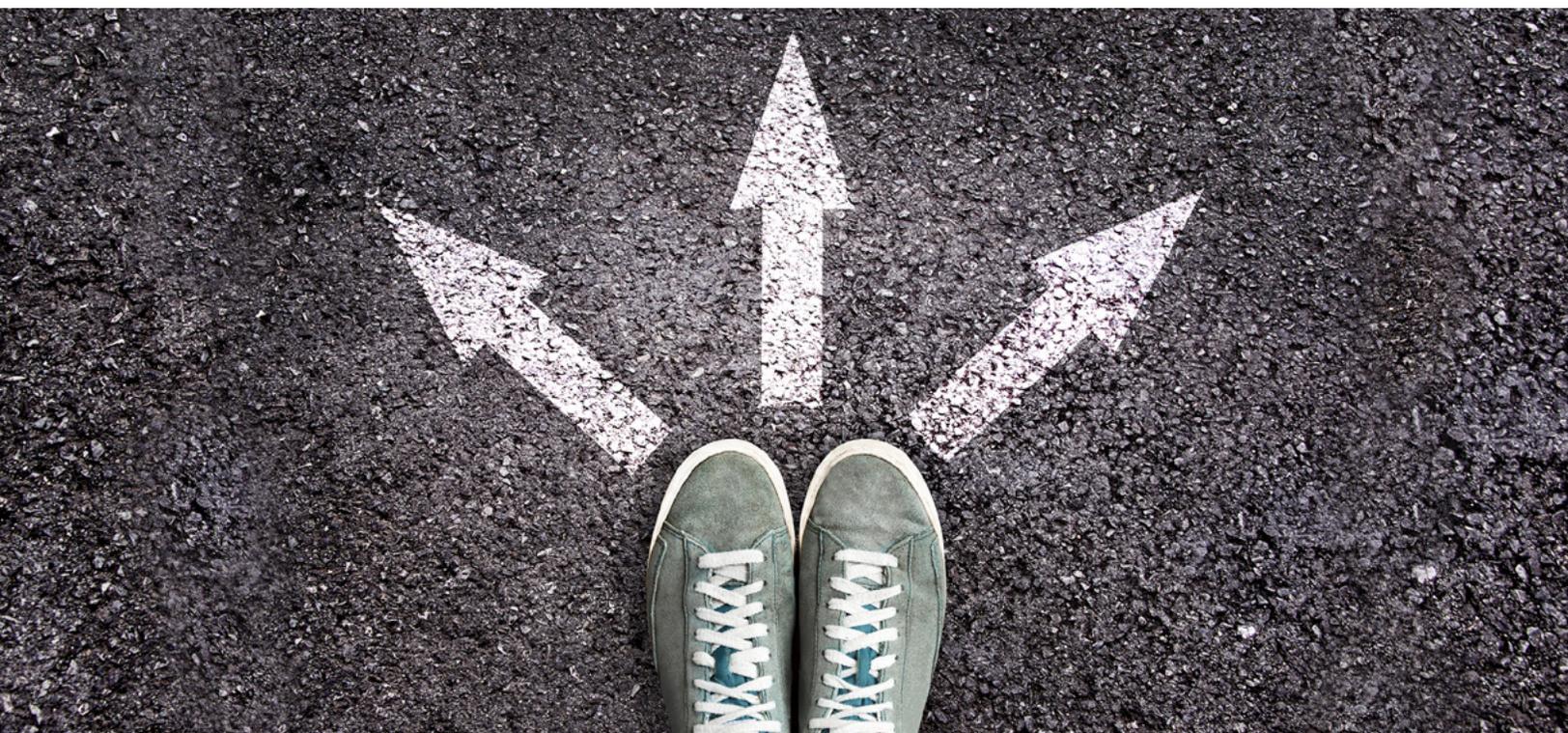


MULTICHANNEL

These days, more and more companies are offering multichannel support in order to keep up with their increasingly tech-savvy customers. Multichannel support means your customer can seek help through a variety of channels like phone, email, live chat, etc. While it might seem like a good idea to offer support through every channel, it may not be feasible for your team - whether due to resources, bandwidth, and audience.

Instead of supporting every channel under the sun and spreading your support team too thin, focus on the channels that your customers are seeking support on.

Maybe the majority of your customers prefer self-service help or maybe they like to reach out on live chat. Research which core channels your customers are spending time on and invest your resources there. You can always reevaluate whether or not to add additional support channels down the line as you scale and grow.



01

The different types of channels that you can offer support on:

- ✓ **Phone:** While calling in for support is slowly decreasing in popularity with the rise of alternative support channels, [phones still account for about 68% of all contact centre communications.](#)
- ✓ **Email:** In today's mobile day and age, email remains a mainstay for many companies as a support channel. 91% of [customers check their email at least once a day on their smartphones.](#)
- ✓ **Social media:** Many customers voice their displeasure, frustration, or anger with companies on social media, which has caused many companies to offer support on these networks because that's where their customers are. Gartner found that [companies who ignore support messages on social media see a higher average churn rate of 15%.](#)
- ✓ **Live chat:** Live chat has been increasing as a support channel because customers appreciate the convenience that comes with being able to talk to a live chat agent at the moment they need help. 44% of [customers say chatting to an agent when they need help during an online purchase is one of the most important features an eCommerce business can offer.](#)
- ✓ **Self-service support:** These days, many customers turn to a company's FAQ (frequently asked questions) page, [knowledge base](#), or forum first when they have a simple issue. [72% of customers prefer self-service support than resolving an issue over phone or email.](#)

OMNICHANNEL

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While the previous point talked about multichannel support, you should also look into whether a support provider can also help you offer omnichannel support. [Omnichannel](#) goes one step further than multichannel; it's not only offering support through multiple channels but all of those channels are working together to offer your customers a seamless experience regardless of how they reach out to your brand.

Think about the type of experience you want to offer your customers: a holistic or disjointed one? [On average, organizations use 35 different data gathering systems with little to no integration.](#) An omnichannel support software will funnel support inquiries from all channels into one integrated system so everything is in one place. This is valuable since customers these days move from channel to channel seeking support, and they expect the entire end-to-end experience with a brand to feel fluid and consistent.



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Customers might tweet at a company, expressing their discontent, email the support team about their issue, and call in for help. It would be a frustrating experience if the agent on the other end of the line didn't have all the information and history, and the customer had to explain everything each time. [89% of customers get frustrated because they need to repeat their issues to multiple representatives.](#)

An omnichannel experience not only benefits your customers, it enables your agents to do their jobs more effectively. 42% of [support agents are unable to efficiently resolve customer issues due to disconnected systems, archaic user interfaces, and multiple applications.](#) With all incoming requests from various channels aggregated in one place, your agents have all the information they need to provide a great customer experience.



TIME ZONES

Is your customer base global or local? This is an important customer experience factor to consider when choosing a support system. If your customers are worldwide, you will likely need to offer around the clock support, and your system would need to take into account time zones for cases and SLAs (service level agreements), which brings us to our next point.



01

CUSTOMER EXPECTATIONS

When customers reach out to you for support, their main concern is resolving their issue as promptly as possible. 82% of [customers say that getting their issue resolved quickly is the number one factor in a great customer experience.](#)

A customer support software that allows you to customize SLAs (service level agreements) will help you best manage customer expectations.

If you have a partnership that requires a specific response or resolution time for your shared customers, SLAs can help ensure you achieve that. You can also set specific SLAs for support tickets that come in from certain channels or inquiries from your high-touch customers.

Once you have your SLAs setup, you can manage customers expectations by conveying to them when they can expect a response by. For example, if a customer fills in a contact form online, in your thank you email you can mention that a support agent will be in contact within 24 hours.



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CUSTOMER SATISFACTION

The last thing you want to consider in your customer experience is the most fundamental of all: are your customers satisfied?

Customer satisfaction is crucial because 70% of [customers say technology has made it easier than ever to take their business elsewhere.](#)

In order to assess customer happiness, you need a support software that offers customizable and personalizable CSAT (customer satisfaction surveys) and NPS (net promoter score) surveys.



CSAT surveys capture valuable feedback straight from your customers. They can be sent at strategic times to ensure maximum impact, such as a day after a support call.



NPS surveys gauge the loyalty of a customer. The survey is one question that essentially asks the customer if they would promote your business to others, providing an instant snapshot of customer sentiment.

Your end goal is always to provide the best customer experience possible, and CSAT and NPS surveys will help you gather the data you need to iterate and improve your processes.



CHAPTER

02

AGENT EXPERIENCE



AGENT EXPERIENCE

02

After you consider the customer experience, you need to think about the experience you want to offer your support agents.

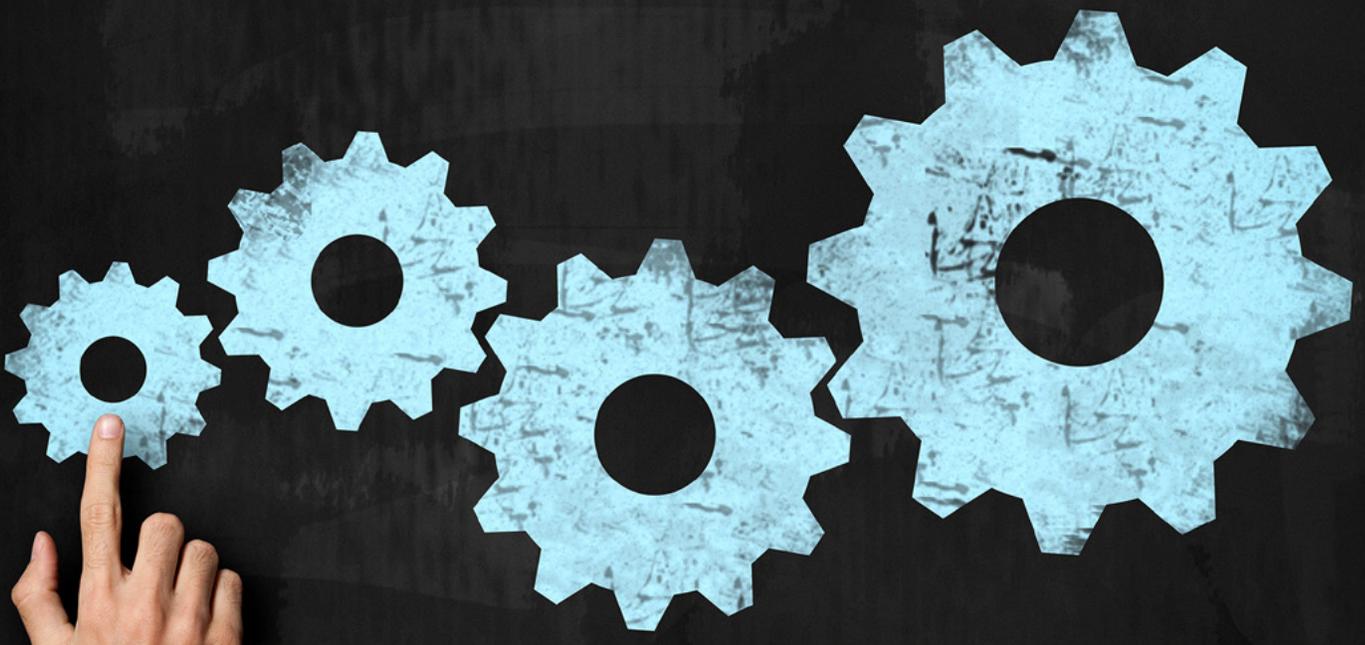
After all, they're going to be the ones who are using the software day in and day out so it has to be intuitive enough to streamline their tasks.

The features your support team will need depends on your individual business. Some support software features to consider for an intuitive agent experience are:

- ✓ **Ease of use:** The system has to be intuitive enough that it doesn't hinder your agents' day-to-day tasks.
- ✓ **Workflows:** It's rare that the out-of-the-box solution is always a perfect fit. Every support team is going to have a different process for what works best for them. A flexible support software will allow you to build a workflow the way you want to work; this includes functions such as customizing ticket views.
- ✓ **SLAs:** We touched upon SLAs in the customer experience section but to be able to customize SLAs is important for your agents as well because it helps them clearly understand what is expected of them and which cases need to be prioritized.

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- ✔ **Templates:** Your support team deals with many cases a day. Case templates help your agents save some time when filling out information for each ticket. Article templates are useful when your agents need to create knowledge base articles from cases. This may be the case if your agents frequently encounter the same problem from customers over and over again. They may decide it's worthwhile to create a support article, and article templates will help streamline this process.
- ✔ **Roles and permissions:** A support software that allows you to customize different support roles and assign permissions to agent accounts will help you better manage your team.
- ✔ **Scheduling tools:** Does the customer support software have scheduling tools to help ensure that no cases, follow-ups, team vacations, or sick days slip through the cracks?



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- ✓ **Training:** Look into the level of onboarding that the provider will give your team. Sufficient training for your agents on how to use the platform will ensure a smooth onboarding process with no downtime.

- ✓ **Support:** Your team provides amazing support, but they need reliable support as well. If they run into a roadblock, whether it's a system outage or questions about features, they have to be able to get the help and answers they need fast. Some factors to consider when evaluating support for your support team:
 - ✓ **Speed:** When there's a customer on the other line, your support agents have no time to waste. Does the support provider have a quick response time?

 - ✓ **Different support channels:** Just as you offer your customers multiple channels, you should look for a provider that supports the channels your team uses.

 - ✓ **Status pages:** Does the support provider have a status page so your agents can quickly and easily check whether there's a system outage?

CHAPTER

03

BUSINESS NEED



03

BUSINESS NEED

Every business is different and will have different needs. An enterprise is going to have different support software wishlist than a smaller business just starting out.

Here are some business need factors to consider:

-  **Implementation:** Depending on how fast you need to get up and running, a smooth implementation process is crucial. Consider how long it will take to fully implement the software, activate accounts, train agents, and customize workflows.
-  **Number of accounts:** Find out if there's a minimum or maximum number of agent accounts that you can have.
-  **Analytics:** It's important to gather analytics on how your customer support is doing. Metrics like average response time and ticket close rates are vital to the health of your support team. Not only should your support software be able to give you the analytics you need to action on, it should enable you to create custom reports and provide you a dashboard to see a snapshot of how your team is doing at any given time.
-  **Mobile app capabilities:** Does the support software offer a mobile app that your support agents can use so they can provide support on the go?
-  **Integrations:** Make sure the support software you choose will integrate easily with your CRM and other systems - you don't want to have to switch support providers down the line.

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- ✔ **Pricing:** There are two pricing factors to consider:
 - ✔ **Accounts:** Some providers charge you a minimum number of agent accounts, and others price by the number of accounts you actually need. The latter is more affordable for small to medium-sized businesses.
 - ✔ **Features:** Pricing is also dependent on functions. Some support providers charge more for enterprise-level features that may not make sense for a small to medium-sized business to pay.
- ✔ **Security:** When it comes to your customer's information, you need to give reassurances that their data is secure. There may also be certain legal requirements around data storage that you need to adhere to. Find out what type of data encryption and disaster recovery plan the support software you're evaluating has in place.
- ✔ **Scalability:** Lastly, you need to think about how your support software can help you scale. Regardless of your size or industry, it's every business' objective to grow bigger and better so the support solution that you select needs to help you achieve that. Some factors to consider:
 - ✔ **Data storage limit.** See if the provider has a maximum limit of data storage space as this may affect your growth.
 - ✔ **The variety of channels they offer.** As mentioned earlier, you may want to add additional or change the channels that you offer support on down the line so it is worthwhile to ensure the provider can support the growth.
 - ✔ **Support for your support.** As you grow, so will the number of cases and tickets so you need a provider who can provide adequate support as you grow.

03

Choosing a customer support provider is no easy feat. Not only are there many different companies to consider, there are various factors like cost and functionality to take into account.

However, if you take away one thing from this eBook, let it be: **think of your customer.** Businesses lose more than [\\$62 billion each year due to poor customer service](#). At the end of the day, you have to choose the customer support software that will help you provide excellent support because it boils down to keeping your customers happy.





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