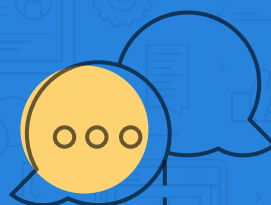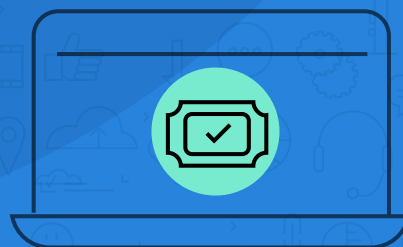**freshworks**

The Buyers' Guide for Customer Service Software

Introduction

Multiple stakeholders play a role in choosing the right customer service platform for your business. The process involves business leaders, contact center leaders and managers, and IT teams. Each stakeholder has different priorities that need to be considered before a purchase decision can be made. This can create issues that slow down your software purchase decisions.

1. **Diverse expectations**

   Each stakeholder has their own agenda when it comes to choosing the right customer service software, and not all of these align with the expectations of the customer or service team. According to a study, the single largest factor accounting for 70% of project failures, is establishing poor requirements.

2. **Cost of ownership**

   52% of B2B buyers said that the biggest risk of getting a purchase wrong is wasting company money. For a software purchase, licensing cost is just the beginning, followed closely by customization costs, charges for installation, maintenance, and upkeep costs, etc. Stakeholders are often not aware of the 'Total Cost of Ownership' when selecting and purchasing customer service software.

3. **Clear rationale**

   In order to ensure the entire organization is on board with the purchase, the stakeholders need to be clear on the rationale behind their choice. What makes this software the right choice for their company? Why does it beat out its competitors? What are the benefits it brings to the table? These questions have to be answered before the final purchase decision can be made.

Freshworks' **Buyers' Guide for Customer Service Software** defines the key principles behind the software purchase decision, addressing the needs of each stakeholder involved. It aims to tackle the issues mentioned above and make the purchasing process easier and faster for you.

Purchasing priorities when selecting customer service software

Business
- Future-proof your CX
- Find a strategic edge
- Protect revenues
- Minimize costs

Contact center
- Increase CSAT
- Optimize productivity
- Improve performance
- Improve agent experience

IT
- Align technology to the business
- Improve ROI
- Reduce risk

PART I

Business priorities when selecting customer service software

**Future-proof
your CX**

**Find a
strategic edge**

**Protect
revenues**

**Minimize
costs**

What you need to look out for

Customer expectations are growing at a very fast pace, and businesses are scrambling to keep up. PwC Research found that the number of companies investing in the 'omnichannel experience' has jumped from 20% to more than 80% as customers demand consistent experiences across multiple channels of communication.
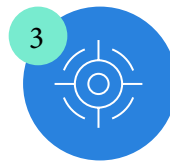
Your customer service needs to stay ahead of the curve. Here are the 4 aspects of a customer service software you need to focus on to ensure this:
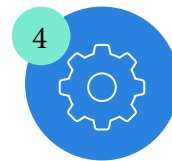
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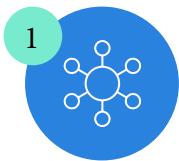
**Emerging service
channels**

2
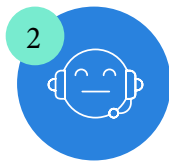
**AI and
automation**

3

**360° view of the
customer**

4

**Proactive
service**

1 Emerging digital channels

We're seeing a clear shift in traffic with more customers moving to digital channels and leaving behind traditional ones. Customers find chat to be easy, intuitive, and accessible, often resulting in a faster resolution. Digital channels are also quite cost-effective for organizations. For example, moving from phone to live-chat support saves $7 per customer interaction.

> **Consumers use an average of almost six touch-points with nearly 50% regularly using more than four**

Keep in mind: Prompt customers using traditional channels to switch to digital channels. For example: if a customer is waiting on hold on the phone, you can provide them with your chat support number to cut down their wait time and ensure they get served faster. Your chat and messaging channels have to be visible to ensure customers use them regularly.

Must-have software features

Omnichannel management
Manage communication and interactions across multiple channels with a centralized view. Keep your agents from having to toggle between screens and ensure your customer's problems are resolved faster.

Live-chat support
Start chatting with visitors looking for support on your website or mobile app. You need to be able to provide a continuous messaging experience to save customers from having to repeat themselves in case their network drops out and they need to start a new chat session. If your agents are unable to solve the issue via chat, make sure they have the ability to convert the chat into a ticket on your helpdesk.

Instant messaging support
Enable customers to message your service team through apps like Whatsapp, Facebook Messenger, Apple Business Chat, etc.

Social media integrations
Manage your brand's Twitter and Facebook accounts from within your customer service platform. Ensure that you are able to convert all relevant mentions and messages into tickets without leaving your application.

② AI and automation

AI, if implemented correctly, can support your team throughout the ticket lifecycle. AI-powered chatbots can ensure that your agents spend less time answering basic, repetitive questions, and more time resolving more complex queries. With the time and effort spent on each query reduced, you will find a reduction in costs as well. You can also enhance agent experience by adopting AI within your helpdesk to guide newer agents with next-best-actions and relevant solution articles.

> **According to a report from McKinsey, 29% of customer service agent duties have the potential to be automated with technology.**

Keep in mind: You should not have to spend time and money on development effort for your AI tool. Look for a no-code bot builder that will allow you to deploy your bot in hours, not months. No-code bot builders allow you the capability to keep improving on your bot without hassle.

Must-have software features

Click-to-configure chatbots

In customer service, chatbots can be used to gather information, provide aid to the customer, or conduct routine transactions. They are especially useful when dealing with high volumes of queries or repetitive questions.

Bot-to-agent handover

With the help of AI and machine learning, enable your chatbot to detect a customer's intent based on their query. For example, if a customer asked about the refund policy, it likely means that they are looking to return a product because they are dissatisfied with it, so your chatbot can smoothly handover the chat to a live agent.

Intelligent ticket automation

Set up automated ticket assignments across channels based on your agents' workload and skill-level to reduce queue time and ensure a faster resolution. You can even automate ticket classifications like Type, Priority, and Group to save your agents' time.

Agent assistants

Use AI to recognize a customer query and suggest the most fitting solution articles, and next-best actions to your agents for faster resolution.

3 360º view of the customer

During their journey with your business, customers have several touchpoints and create a lot of data across multiple interactions. A unified customer view can help you deliver personalized customer service, so your customers don't have to repeat themselves, and agents have complete context of a customer's problem.

25% of customers say that the most frustrating part of customer service is having to repeat themselves to multiple support reps.

Keep in mind: Your vendor should be able to provide your agents with the right information at the right time. Get a single view of the customer by accessing their profile, past purchases, current orders, and conversation history. Your software should ideally be hosted on an open platform that allows for API access to build custom data flows, as well as integrations with other business applications.

Must-have software features

Conversation history

Your customers could interact with sales teams or multiple support agents across channels. Make sure your software enables your team to access all customer conversations across teams and channels. The right context goes a long way.

Rich customer profile

You need to be able to build out a single, comprehensive view of each customer that showcases all the past touchpoints and recent orders. This will help your customer service team provide personal and proactive service.

Seamless integrations

Being able to integrate your CTI telephony, CRM, BI tool, order management system, etc. will allow you to bring in customer data from other internal systems, providing your teams with a truly complete view of each customer's interactions.

4 Proactive service

The best service experiences are anticipatory, not reactive. This means that ideally your customer service team identifies an issue, and contacts the customer before they need to reach out to you. Moving to proactive customer service can help you increase CSAT scores and reduce query volumes. You will also find that customers will be more loyal, and willing to speak out as an advocate of your business or brand.

> **69%** of consumers globally have a clear preference for brands that offer proactive notifications and service.

Keep in mind: Your vendor should have the ability to automatically create support requests triggered by errors or downtime, as well as notify customers with status updates. Your software application will also need to be able to detect frustration signals on your website or social media channels and notify a support agent immediately.

Must-have software features

Proactive notifications

You need to be able to send emails out to multiple customers proactively to notify them of an ongoing issue without leaving your helpdesk. Any responses to these emails should be automatically created as tickets on your platform. For example, keep customers informed about scheduled maintenance or regarding a product update.

Frustration detection

Be notified of online frustration signals such as rage clicks, dead clicks, thrashed cursors, and proactively reach out to those customers. Avoid issues like cart abandonment by getting in touch with customers who are stuck on checkout and might need assistance.

PART II

Contact center priorities when selecting customer service software

Optimize productivity

Streamline operations

Improve customer and agent happiness

What you need to look out for in a vendor

Workforce optimization is the process of using digital tools to improve operational performance, efficiency, and quality. Research conducted by the Aberdeen Group found that workforce optimization can improve customer experience results and consistency, increase agent performance and productivity, lower operating costs, reduce customer effort, and improve brand loyalty.
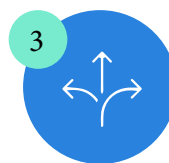
Choosing the right platform can have a positive operational and economic impact. Here are the 4 aspects of customer service software that can help ensure this:
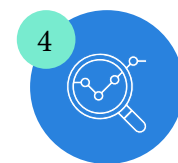
1

Agent efficiency

2

Collaboration

3

Flexibility and scalability

4

Data-driven insights

① Agent efficiency

Today, customers prefer to try to find a solution before contacting the customer service team. Upgrading your self-service with chatbots can ensure your customers receive 24/7 support and instant responses to their queries. Provide customers with the answers they need to simple queries to free up your agents' time to deal with more complex issues. Chatbots are also available to support your customers on every page of your website, making self-service a more accessible option.

❝ **By the end of 2020, 80% of entrepreneurs will use chatbots.** ❞

Keep in mind: Customers will consistently stretch the limit of your chatbot. Fail gracefully by setting up timely handovers to live-agents.

Must-have software features

AI-powered chatbots
Integrate chatbots with your support process to reduce ticket volumes or collect information for agents to resolve queries faster. While your current self-service might help deflect just FAQs, chatbots can use APIs to respond to atypical questions or perform actions like processing a change of booking, refunds, etc. This can increase deflection rates to 60%.

Self-service across channels
Self-service need not be restricted to an FAQ section on your website. Make it accessible through a branded knowledge base, a web-widget, chat, messaging, bots, and even on the phone.

Agent availability management
Automate workflows when agents are on a break, outside their shift, or out of office, to make sure customers always get quick responses.

Quality assurance
Review the quality of your agents' interactions, identify skill gaps, and coach them to provide consistent, superior customer service.

Quick actions for agents
Save time and effort by automatically performing repetitive tasks with a single click, letting your agents focus on customer problems. Allow your agents to trigger automation based on a specific scenario, or set automatic triggers for a specific period of time, or in the case of an event. Features like 'canned response' make the process of bulk replies easier for your agent. You also need to be able to automate complex business workflows using simple multi-level logical operators to free up your agents' time.

2 Collaboration

Customer service is a team sport. Your agents are the first line of defense, but they need to work closely with finance, billing, operations, marketing, and sales to resolve issues. Lack of ownership and poor collaboration can result in increased resolution times and reduced customer satisfaction.

> **86%** of employees and executives cite lack of collaboration or ineffective communication for workplace failures.

Keep in mind: Customer queries often get lost during internal communications via email or messaging groups. Your vendor should provide a platform that allows teams to collaborate with context without leaving your helpdesk.

Must-have software features

Live discussion with context
Bring in other internal teams and external vendors to assist with a support conversation without leaving your helpdesk. Make sure your customer gets the best answer right up-front to avoid back-and-forth.

Enable parallel work
Enable teams to work on an issue parallelly without losing visibility of the ticket. Allow your teams to stay in the loop regarding the progress of a ticket. You need to also be able to split tickets into smaller tasks that can be assigned to other teams. This ensures each team takes ownership of their part of the resolution. Ultimately, this can help ensure faster resolution for your customers.

Analytics on ticket lifecycle
Assist teams to track and identify the bottlenecks in the ticket resolution process through data-based insights. Find out where the tickets are held the longest and eliminate the hurdles for a more efficient support team.

Linked tickets
When experiencing a sudden surge of tickets, enable your agents to link similar tickets together, and send status updates to all of them in one go.

Integrations with collaboration tools
Integrate with tools like Slack to share tickets with internal teams like engineering, product, marketing, etc. to keep them abreast of the pulse of the customer.

③ Flexibility and scalability

The COVID crisis has underlined the need for agile customer service. Your processes and platform need to be dynamic, innovating at speed with the business itself. Switching to remote work, and losing a physical office space should ideally not affect the way you work. You need to be able to manage changes on-the-go without dipping into IT resources.

> **71%** of businesses are deploying cloud-based SaaS to enhance IT delivery speed.

Keep in mind: Your vendor needs to provide you with a cloud-based platform that will allow for cross-team collaboration between remote agents and other internal teams. You will also need to be able to virtually onboard and train remote agents through your platform.

Must-have software features

Omnichannel routing

Balance the workload amongst your agents on the basis of their skills, their schedule, and their capabilities. With the work-from-home model in effect, you need to be able to remotely switch agents over from phone to chat support or vice versa depending on volumes.

No-code platform

You need to be able to modify your processes and customer service platform without relying heavily on your IT team to get things done. A no-code platform means you can make changes in hours, not months.

Sandbox and audit logs

Enable support teams to test new features and configurations without directly impacting customers or agents. Ensure there are no interruptions or downtime while trying out or updating new features into your environment. Keep extensive logs on any changes carried out on your platform in order to ensure accountability and prevent errors.

Serverless applications

Your software should ideally be hosted on an open platform that allows for API access to build custom data flows, as well as integrations with other business applications. Serverless apps can help reduce costs and effort to build, host, and maintain an app.

4 Data-driven insights

There's a fine line between doing your job, and doing it well. You need the tools to help your team understand where they stand in terms of metrics, performance, and customer satisfaction. Analyzing your customer support data will help your agents provide more personalized and customized support. This will, in turn, improve your customers' experience and reduce customer churn.

Keep in mind: Your customer-facing collateral needs to be constantly revised and updated. Your software needs to have the capacity to gather feedback on knowledge base articles and chatbot workflows in order for you to assess what customers are finding useful. Don't publish and forget, but rather follow up and make changes as needed.

Must-have software features

Trend forecasting
Forecast ticket trends and support volumes to staff effectively and manage your operations.

Custom analytics and insights
Monitor help desk performance and agent-wise insights, assess coaching needs and identify bottlenecks in the ticket lifecycle to improve your service process. Refine and extract the insights you need, and resolve for the root causes to make long-term improvements.

Real-time operational dashboards
Get live updates on your agents' performance, their SLA compliance, any escalations triggered, and act in real-time. Keep track of the workload balance of each agent to predict staffing needs and ensure equal distribution of work. Give your agents visibility into the tickets that require immediate action.

PART III

IT priorities when selecting customer service software

Align technology to the business

Improve ROI

Manage risk

What you need to look out for in a vendor

It's important to ensure that any technology being used by your business complements systems that are already in place. Make sure you analyze the existing tech-stack and operations before evaluating and selecting new software.

Here are 4 key things you need to look for in your customer service software before making a purchase decision:

1 **Safe and secure**

2 **Cloud-native**

3 **Instant-on**

4 **Low Code**

① Safe and secure

Depending on where your business is based and the type of deployment, the security and compliance requirements might change. Do the necessary research to ensure your customers' data is never at risk.

Companies that host their software on cloud platforms like AWS are more secure than those hosted on private clouds as AWS manages the security perimeter to a high standard.

Checklist

✓ Security certifications like SOC 2, ISO 27001, GDPR

✓ Industry certifications like PCI DSS, HIPAA

✓ Sandbox for effective change management with a develop-test-deploy process

✓ Audit logs to track changes for compliance purposes

✓ Granular roles and access controls - allow people to see only what they need to see

✓ IP Whitelisting to establish a network perimeter and prevent unauthorized access

✓ Single-sign-on with Google, Okta, etc.

✓ Customizable password policies - length, complexity, automatic expiry dates and more.

> **85% of consumers will not do business with a company if they have concerns about its security practices**

(2) Cloud-native

Your customer service software needs to be agile and allow for a quick transition to remote work when needed without too much effort. Cloud platforms are easy to rollout, require minimal to no coding, and typically meet security and compliance requirements across the world. It allows for serverless integration which means your applications can talk to one another, instead of existing in data silos.

When choosing a cloud-native solution, the ownership of uptime, maintenance, and upgrades move from your IT teams to the cloud vendor, which is more reliable, especially for mission-critical software like customer service. This also frees up valuable time for your IT team.

" **81% of organizations say a single hour of downtime costs over $300,000** "

(3) Instant-on

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When choosing a cloud-native solution, the objective of uptime, maintenance, and upgrades move from your IT teams to the cloud vendor, which is more reliable, especially for mission-critical software like customer service. This also frees up valuable time for your IT team.

Checklist

- ✓   An intuitive user interface for agents

- ✓   The ability to enable bulk import of data, users, etc.

- ✓   Out-of-box reports and dashboards

- ✓   Click-to-configure software for easy deployment

4 Low code

Software that requires a lot of coding for customization and installation inevitably eats into the time of IT teams or requires the hiring of external consultants. This can make the process of implementation time-consuming and expensive. In the event of downtime, getting the system back up will take a lot of time and effort, which can inconvenience your customers.

A low coding requirement helps your platform stay versatile. Make sure you have the flexibility to customize your software without spending too much time, money, or effort.

Checklist

✓   Code-free query routing setup

✓   Workflow automation builder

✓   No-code bot builder

✓   Out of box app integrations

✓   Serverless app platform

✓   Out of box CTI connectors to integrate your telephony system

Conclusion

Once you've considered the areas we covered in this guide and have ensured that all the features you need are available with the vendor of choice, your next step is to get buy-in from the rest of your organization. Build a business case for the platform of your choice by following these steps:

1. **Identify the business problem:** Make sure you have complete clarity on why you need a new platform. Define the drivers for the switch by answering the following questions:

   - What are the challenges you're currently facing?
   - Are there basic functionalities missing in your current application?
   - Are your customers unhappy with your current standard of service?
   - Are your agents struggling with the current platform?

2. **Outline your evaluation process:** Provide a thorough explanation of how you approached the customer service platform selection process. Ensure that you have answered the below questions:

   - What were the options that had been considered?
   - How did each option weigh up against your goals and the needs of your customer service team?
   - What were the costs, benefits, and risks involved with each solution that had been considered?
   - How many of these solutions did your team actively trial via demos and free trial periods?

3. **Recommend your preferred solution:** Rank your shortlisted solutions on the basis of 4 key areas to provide the rationale behind your preferred choice. These areas are:

   - Increasing customer happiness by providing faster resolutions and proactive support
   - Increasing agent happiness by deflecting and automating routine queries, and providing a 360º view of each customer
   - Reducing costs by opting for low-cost channels, reducing the effort and time taken per ticket, and ensuring there are no hidden costs
   - Establishing return on investment

Your customer service platform can be the conduit to your business' growth and success, so it is important to choose carefully.

❝ **Businesses can grow revenues between 4% and 8% above their market when they prioritize better customer service experiences.** ❞

About Freshworks

Freshworks is a customer service platform leader. Our customer-for-life platform is ready to go, easy to use, and scales to businesses of all sizes. Over 40,000+ paying customers love our products and work with us to improve their customer service.

If you want to make the customer experience your competitive advantage, check out Freshdesk.

https://www.freshworks.com

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