

# Choosing the Right Customer Support Tool for Your Business

A buying guide from  HelpScout



*son*

Have you ever googled “customer support software” and been overwhelmed by the endless options, every one of them claiming to be the No. 1 choice? Figuring out which tool to choose — or even where to start researching — can be challenging.

That’s where this guide comes in. It will cover how to pinpoint your specific needs, what to look for, what to avoid, how to buy software in this category, and how to convince those in charge of the budget to approve the purchase.



## Who should read this?

*If you have anything to do with your company's customer service, there's something in this guide for you.*

- Customer service leaders who want to deliver consistently high-quality service as their support volume grows.
- IT/operations managers who need to understand and evaluate support solutions and use cases to make informed decisions.
- Customer support professionals who want to influence how their work tools are chosen.
- CEOs and founders who want a support tool that grows alongside their businesses.

## What will you learn?

- How to properly assess your current customer service systems and processes.
- How to identify and prioritize the type of software and individual features you need.
- How to choose a solution that aligns with your customer support goals, challenges, needs, and budget.
- How to effectively compare and evaluate solutions, features, and vendors.
- How to advocate internally for a new solution and handle common objections

## What else is in this ebook?

- A worksheet for assessing the gaps in your customer service.
- A vendor comparison scorecard template.
- A customer support tool evaluation checklist.

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## CHAPTER 01

# Identify your needs

## What should you look for in a customer support tool?

The short answer is: It depends. It all comes back to your unique situation and the problems you are looking to solve.

Most organizations do not need an enterprise-level customer support platform — nor do they have the resources to have dedicated administrators to manage complex systems. If you're just starting out, you may not need much more than an email inbox. Or maybe you're at the point where your team and customer base is growing and you're looking to add an easy yet scalable platform to get you the basics.

What makes sense for companies with thousands of employees doesn't make sense for a growing business that needs to keep things simple, move quickly, and focus on delighting customers.

# 1 Determine your needs

Think of it like planning a camping trip. Before you max out your credit card on camping gear from REI, you need to clarify your vision for the trip and establish some guidelines. Are you planning on setting up a tent by a lake? Are you hiking up a mountain? Are you going to a fully furnished cabin with a bathroom, which is kind of near some tents, and calling that camping?

Knowing exactly what you need will help you prioritize what to buy.

The first step in determining your needs is to define your company's standard for great customer service. Once you sketch out a clear picture of the customer service you want to offer, you have a goal to measure software needs and features against. Whatever software you choose, it needs to help you deliver the type of service you have outlined.

# 2 Define your customer service standard

**What experience do you want to offer your customers?**

Imagine the ideal customer support interaction from your customer's perspective. Do they need to use a website to get help, or can they fire off a quick email? Can they choose to contact support via multiple channels? Can they answer their own questions easily using self-service tools?

**What type of support do your customers expect?**

Your particular customer base will come to you with their own requirements and expectations. Do they prefer email? Are they comfortable using self-service tools? Do they expect an answer within an hour or within a day? Look for clues as to what your customers expect from you and how satisfied they are currently.

### 3 Audit your current service

You need to know where you are before you can get to where you want to go.

What's getting in the way of you consistently achieving the standard of customer service you laid out?

Fill out the [worksheet](#) in the resources section to identify your specific challenges. Once you're done, you'll have a better sense of what you need from your customer service software — and the relative priority of those items.

Here are some examples of questions you should consider in your assessment:

- What are the most time-consuming tasks for your team that could be automated or made more efficient?
- Are you having trouble connecting separate customer data sources, affecting your service quality?
- Do you have a way to measure the impact of customer service efforts on the business?

Check out the [Customer Service Assessment Worksheet](#) in the resources section! ✨

**Pro-tip:** Once you fill out the worksheet, refer back to your answers if and when you go on demo and sales calls. The good ones will likely ask you about your current challenges so that they can tailor their pitch to you and explain how their software addresses your specific needs.

## CHAPTER 02

# Find the right type of solution

Choosing the right customer support software for your team can feel overwhelming. There are a multitude of options, all with their own merits and ways to help you improve. However, just because something is good doesn't necessarily mean it's good for *you*.

In large part, making that distinction comes down to understanding your own needs. Beyond that, it's useful to know what's out there in general.

In this section we cover some common types of customer support tools, what they're used for, and features to look for when vetting a specific tool.



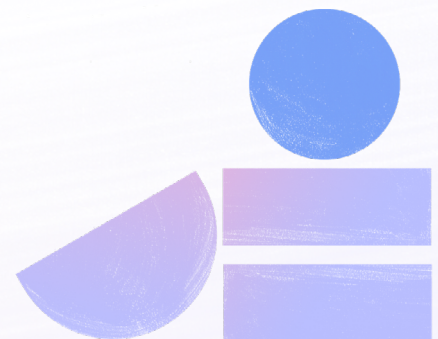
## What type of customer support tool should you use?

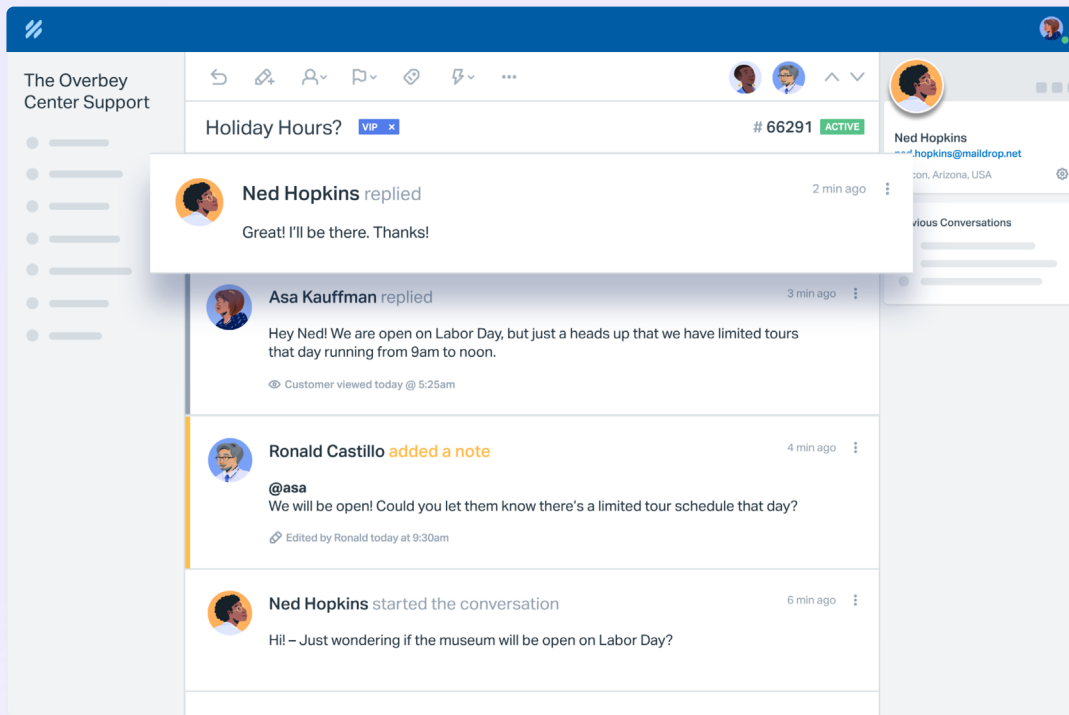
It's hard to find the right tool if you don't know what you're looking for. The categories of customer service software and customer support software cover a lot of ground and can include everything from a free Gmail account to an enormous enterprise call center system. However, we're going to focus on these core types:

- Help desk
- Shared inbox
- Knowledge base
- Live chat

We will note that some customer support tools cover multiple use cases, whereas others are more singularly focused. For example, with Help Scout, you get a shared inbox, knowledge base capabilities, live chat, and more — all in one platform.

To ensure you find the proper fit, we've outlined what each type does, when it makes sense to use it, and which tools to consider.





# 1 Help Desk

*Also known as a ticketing system, ticket management software, customer support software, or service desk software.*

Help desk software is typically one of the first tools support teams invest in. It helps centralize all your service-related customer interactions, and, depending on the tool, can handle support requests from multiple channels like email, chat, social media, and phone.

At its core, help desk software lets you manage and streamline customer conversations to create a better experience for both customers and agents. Below are some signs help desk software may be the solution you're looking for.

## Use if:

- ★ **You need a better way to manage your support queue.** Things like tagging and automations can greatly help reduce manual work.
- ★ **You need more accuracy in your customer responses.** Help desk software helps you better organize customer conversations, ensuring the right people respond.
- ★ **You need better and more efficient internal collaboration.** Help desk systems generally come with features like private notes that let your support team members collaborate without exposing their discussions to your customers.
- ★ **You need to prevent duplicate replies.** Ensure team members can see when other people are viewing and responding to conversations so customers don't get multiple, potentially confusing responses.
- ★ **You need a better way of escalating urgent customer conversations,** such as customers who are more upset or have a greater chance of converting to a paid customer.
- ★ **You don't want to leave customers hanging.** Some help desk options alert reps and notify them about the day's tickets/conversations.

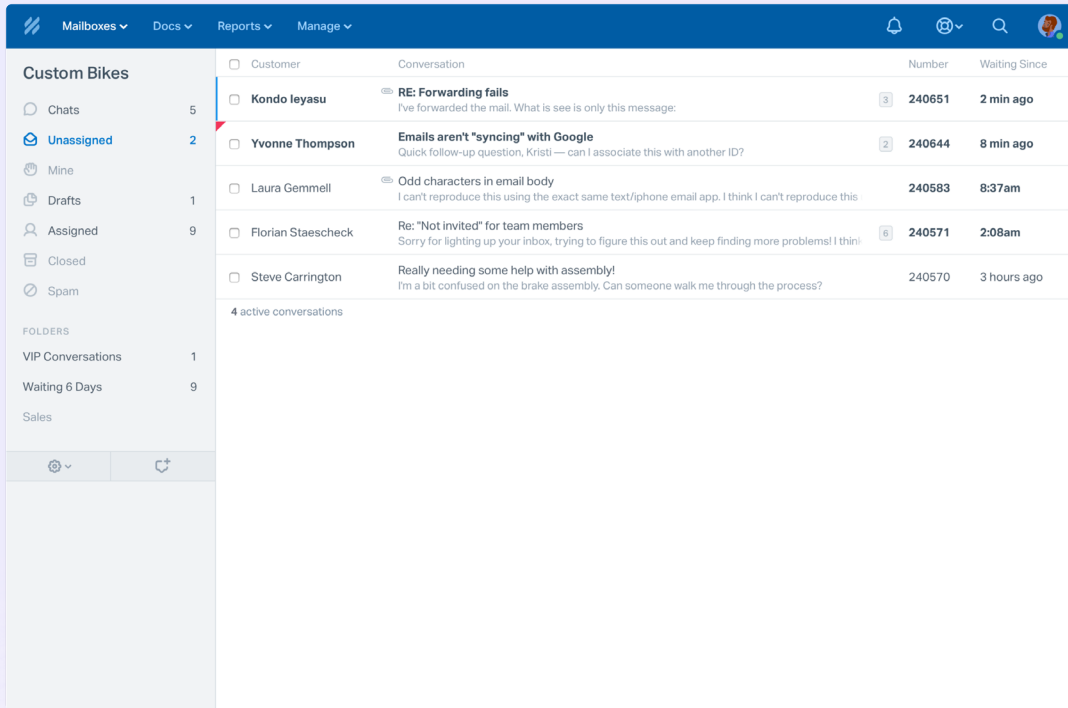
## Things to consider:

- **What's the hands-on experience of the tool like?** Schedule demos or sign up for a trial with tools in the running, and test out features you're likely to use on a day-to-day basis to see how they might impact your workflow.
- **What's included in each plan?** Depending on the tool, even basic features like analytics may only be offered on higher-tier plans. Also, be sure to pay attention to how they bill, as some options go by ticket count and others charge a flat rate.
- **Is there additional functionality?** Some help desks include other tools like knowledge base software and live chat. Inclusion of additional features could mean more functionality and even offer some overall cost savings for your team.

## Help desk platforms to consider:

- Help Scout
- Zendesk
- Kayako
- Talkdesk
- Freshdesk

Recommended reading: [The 9 Best SaaS Help Desks + How to Pick the Right Tool](#) 



## 2 Shared Inbox

*Also known as an email management system, a universal inbox, a team inbox, or a shared mailbox.*

Shared inbox software is a tool that allows multiple people to access and respond to messages sent to a specific email address. There are generally other organization and automation features included to help effectively manage customer conversations.

Now, you may be thinking — isn't this what you just talked about above? Yes and no. Shared inbox software is like a lite version of help desk software since it tends to focus mainly on email interactions and not on the additional channels that help desk software may.

## Use if:

- ★ You need to receive emails at a team email address.
- ★ You need to send emails from a team email address.
- ★ You need access to a group inbox to view all sent and received emails.
- ★ You need access to performance data.
- ★ You're struggling to understand support volumes and capacity.
- ★ You regularly send duplicate responses.
- ★ You're running into issues with efficiency.
- ★ Collaboration is difficult with your current solution.

## Things to consider:

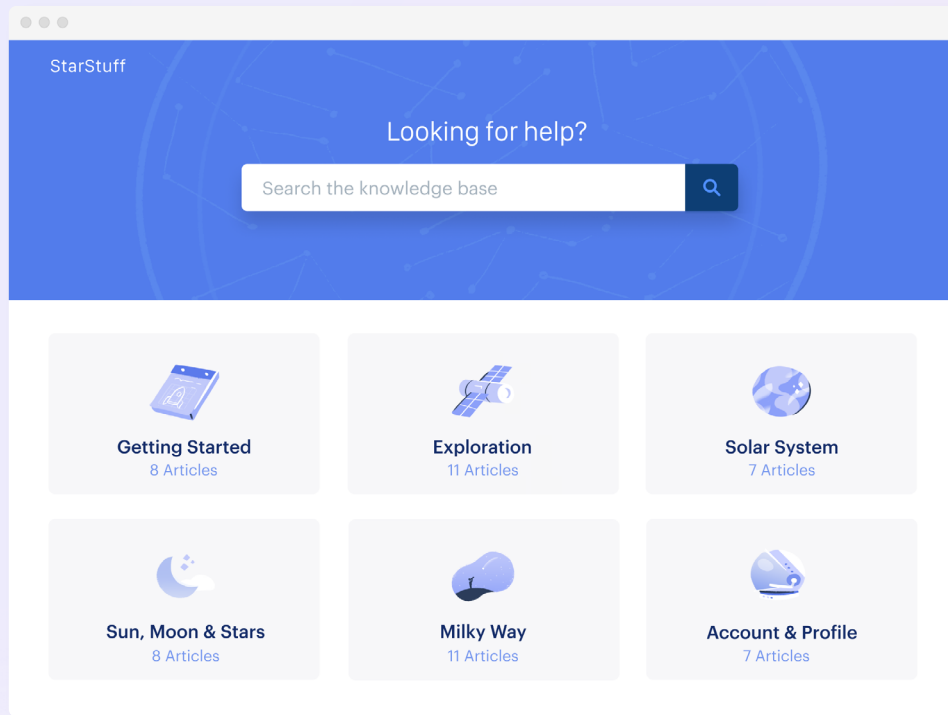
- **What collaboration features does it offer?** Similar to help desk software, tools like private notes and the ability to assign conversations to specific agents are important.
- **Is it stand-alone software or an extension?** Some shared inbox tools exist as stand-alone products. However, there's a whole class of tools that are essentially Gmail or Outlook extensions. Stand-alone tools tend to have a few more features, but they also may be a bit more expensive.
- **Does it integrate with other tools?** Since a shared inbox is generally used in conjunction with other customer service software, it's important that it connects with those other tools. Look for options that work well with your current (or planned) tools.

# Stand-alone shared inboxes to consider:

- Outlook shared mailbox
- Front
- Google Collaborative Inbox
- Helpwise
- Hiver

**Recommended reading:** [The 7 Best Shared Inboxes and How to Pick the Right One](#) ✦





### 3 Knowledge base

*Also known as help center software or FAQ software.*

Knowledge base software is a tool that allows you to create, store, organize, manage, and share self-service content with an audience. Things like FAQ pages, video tutorials, and how-to articles are all common types of content housed in a knowledge base.

Generally speaking, there are two main types of knowledge bases: internal and external. With an internal knowledge base, content is private and may require the user to log in to access the information, whereas an external knowledge base is public and accessible to anyone.

It may be helpful to think of an internal knowledge base as geared toward your employees, while an external knowledge base is geared toward your customers. Some tools focus more on one use case than another, but there are also some capable of doing both well.

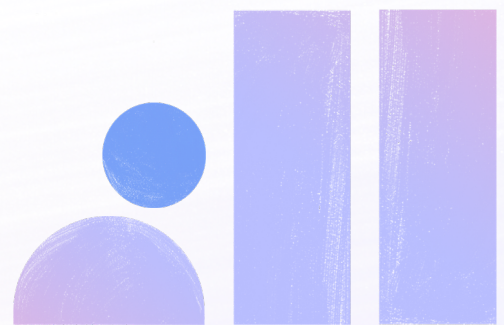
*“When you get it right, self-service is an infinitely scalable, cost-effective way to make customers happy.”*

**Nick Francis**  
CEO, Help Scout



## Use if:

- ★ You need to save time responding to common customer questions.
- ★ You need a quick way for your customer service team to reference answers to common questions, or a way to provide your support team with additional resources to share with your customers.
- ★ You need a cost-effective way to reduce the time and effort the customer has to spend in order to get an answer and move on with their current task.
- ★ You want to adapt with the market and offer a self-service option. Research shows that a [majority of people prefer to find their own answer first](#) before they will reach out for help.
- ★ You need a place to create, store, organize, manage, and share self-service content with an audience.
- ★ You need to reduce support volume. When there is lower volume coming into the inbox, your team can focus its energy on higher impact, more fulfilling activities.



## Things to consider:

- **Is it easy to create content?** It's important that both the people creating the content and the people viewing the content have a good experience. Look for products with no-code options and intuitive editors.
- **Is it easy to find content after it's created?** Even the most comprehensive guide is pretty useless if someone's not able to find it. Seek out tools with robust search functionality and organizational capabilities. For example, are you able to group articles together and create sections? Or add tags to make searching easier?
- **Can you house the content you need?** Including multiple types of content can make your knowledge base articles even richer and more helpful. Though most knowledge bases these days can handle most content types, it's still smart to ask if there are any file, content, or media limitations.
- **Are there reporting features?** Reporting tools are valuable for successfully scaling your support. They can show you where your customers are getting stuck, what documents need to be added or updated, and how to prioritize product improvements.

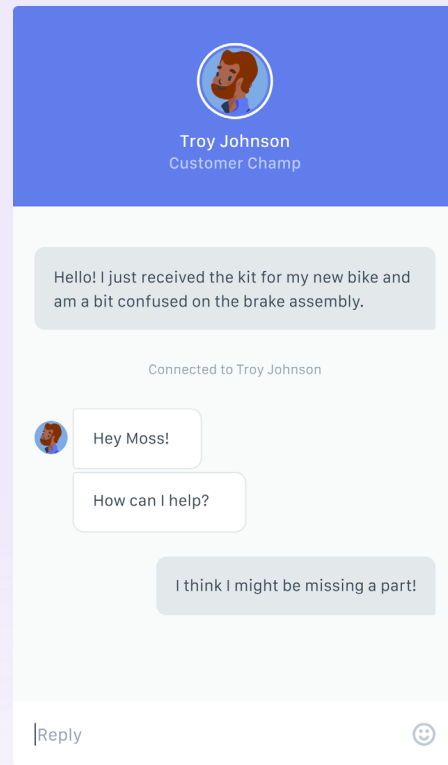
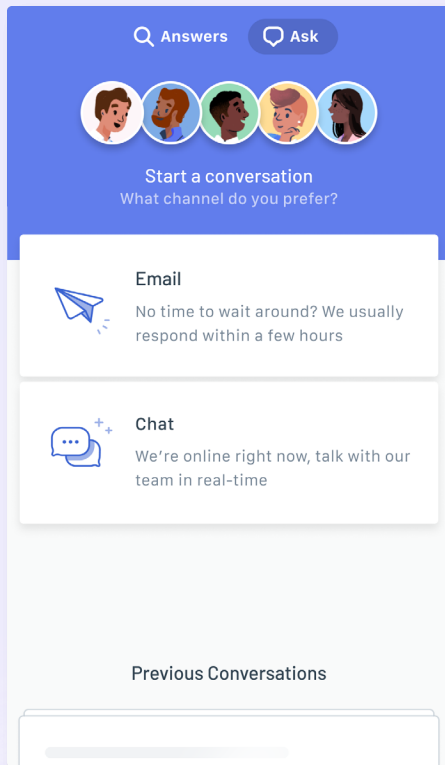
## Stand-alone knowledge bases to consider:

- Docs 360
- HelpJuice
- Guru
- Confluence
- Notion

**Recommended reading:** [Knowledge Base 101: Definition, Benefits, Examples, and Tips](#) ✨

**Fun fact:** Help Scout customers see a 20%–30% reduction in customer requests after adding a knowledge base that enables customers to find answers on their own.





## 4 Live chat

*Also known as chat support software or proactive messaging software.*

Live chat allows customers to have text-based conversations with support teams via the web. By using live chat software embedded in the company's website, customers can send their questions to a person (or sometimes an AI bot) who can quickly reply to them in the same small window.

The "live" part of live chat support is a reference to real-time, back-and-forth conversation, as opposed to email support where there may be no expectation of an immediate reply. Some tools, like Help Scout's Beacon, combine true

real-time live chat with a hybrid messaging option, allowing both synchronous and asynchronous conversations to happen in the same chat tool.

Live chat has been a customer service staple for years because it's highly accessible and offers a more conversational approach to communication with customers. That accessibility reduces customer effort, which is an important factor in building customer loyalty.

## Use if:

- ★ You need to reduce time to resolution for customers.
- ★ You want to make your support highly accessible.
- ★ You want to improve customer satisfaction.

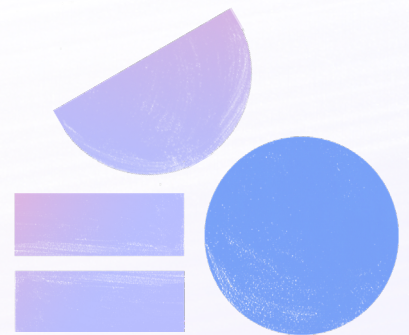
## Things to consider:

- **Is it easy to set up?** Since chat windows generally live on an existing page, they do require some amount of coding to set up. That said, some tools create code snippets you can easily copy and paste for setup, whereas others are a bit more complicated.
- **Does it integrate with other tools in your support stack?** Though it's usually the goal to solve a customer's inquiry in one session, that's not always possible. In the case of a chat interaction, that means having to transfer them to a different channel (usually email). If your live chat tool doesn't integrate with your help desk, it can be a huge pain and cause a number of problems for everyone involved.
- **Is there any functionality in offline mode?** Depending on your team, there may not always be a live agent available to cover chat. In those cases, it's good to still retain some functionality, so be sure to check how a tool works in both online and offline mode.

## Stand-alone knowledge bases to consider:

- Olark
- Pure Chat
- LiveChat
- Chaport
- Acquire

**Recommended reading:** [Live Chat Support 101: Definition, Benefits, and Best Practices](#) ✦✦



## CHAPTER 03

# Evaluate your options

## 7 things to do when assessing software vendors

Now that you have a better understanding of the different types of customer support tools — and a sense of which ones might work for you — you're ready to evaluate some vendor options.

# 1 Focus on what's essential

By now you should have a good sense of what your needs and core requirements are. The reality is that more features often lead to more complexity and overhead. In the end, it's usually better to find software with the core features you need — rather than every feature any support team in the world has ever needed.

Start with a list of all the features you might want, and then group them into essential and nice-to-have piles. While assessing features, consider the following:

- Does this feature need to be built into the software, or could you connect with a separate tool that does the job better?
- Are there legal requirements to meet (e.g., data storage and privacy controls)?
- Are there technical requirements to meet (e.g., data format and accessibility)?
- What other products or services do you need to connect this to? Is it possible?
- If the software does not do X, can you deliver the customer service experience you want to provide?
- For non-essential features: If the software allows X, how could you potentially use it to improve the customer experience?



## 2 Evaluate ease of use

Customer support is hard enough; your support tool shouldn't make it harder. Look for support tools that take both the customer and the agent experience into consideration. Your customer service team will be using this tool all day, every day. How easy is it for them to navigate? How quickly does it load?

The software you choose should, as much as possible, be frictionless for your team, allowing them to use all their energy helping customers and not fighting their tools. Ask the following:

- Is the interface intuitive and simple to use?
- Does the system load and make changes quickly?
- Is it easy to find the options your team will use most?
- Can you make workflow changes easily without contacting an administrator?
- What will the user experience be like for your agents? For your administrators and finance team? For your customers?
- Do you need to enable developer access?



### 3 Consider scalability

As most software companies know, needs can change quickly. Since you don't want to switch tools every few years, it's important to seek out options that cover both your current and your projected future needs. Will this solution continue to work as your business grows?

Ask the sales and success teams of the solutions you are considering for an estimate of their bigger customers' support volumes. You don't want the higher fees and complexity of software you don't need, but you also don't want to have to pick a new help desk 12 months from now.

### 4 Review reporting options

Anyone trying to track the output and success of a support team knows metrics and reports are essential, but testing reporting is tricky when you don't have real data to report on.

Demo accounts in the tools you're considering can give you a sense of what is possible. Also, if you've thought carefully about which customer service metrics you need to be able to track, you can talk to the provider about how they can help you track those metrics with their tool.

It's worth figuring out who makes it easiest to uncover these insights as you decide on a new tool — before you trap yourself in an endless cycle of bewildering reports and unwieldy spreadsheets.

The right tool will provide you with the metrics you need to determine things like your team's busiest hours, average first response times and resolution times, how many customers access your knowledge base articles, team members' CSAT ratings, and more.

## 5 Verify integrations

Connecting with your CRM and other sources of business and customer data can make your customer interactions run more smoothly and reduce headaches for everyone involved.

Determine whether you could integrate your proposed new system with existing tools (that you won't be consolidating into the new platform), and take note of any technological and support help available to do so.

While it may be possible for developers at your company to create custom integrations for your help desk using an API, it can be a lot simpler if the software you choose integrates with the tools you need right out of the box.



## 6 Prioritize reliability and support

Who supports the support team? When your help desk system has an outage, when a feature is confusing, or when a process needs reworking, how will you get help? Not only do you need to know which support channels are available, but also want to know how quickly you'll be helped and the competency of the team helping you.

Even companies that sell customer service tools aren't necessarily excellent at supporting their own customers. Read customer reviews to get a sense of support quality — and even run your own tests.

Submit sample requests to each help desk support team, and see how timely, useful, and friendly the responses are. When you can't help your own customers because of a help desk issue, a responsive, informed support team is hugely valuable.

You can also review the Twitter feeds and [status pages](#) of your top choices to see how responsive and communicative they are when issues arise. Consider the experience you want to create for your customers, and test that against each tool.

## 7 Look for software that prioritizes customer service

Some platforms serve multiple purposes and tack on support features as an afterthought, but that is a recipe for frustration for your customer service team. A system that treats support as a primary purpose will be much more enjoyable to use, and that translates to better customer service.

That doesn't mean you must use a big, enterprise-level solution, though. A user-friendly and cost-effective platform can grow with you without the overhead of an expensive, complex system.

## What to ask vendors

In addition to asking vendors about the functions and features you require, consider asking:

- **What's the total cost?** Include things like your required number of users, discounts, add-ons, integrations, training, and implementation. Some providers also offer different levels of support based on the plan you sign up for — or charge an extra fee for premium support — so be sure to dig into the details and factor any additional costs into your overall budget.
- **How long will it take to implement?** What is the implementation and onboarding process? How will it be managed? What are the limitations, if any?
- **What is the switching process?** If you are moving from another tool, what can and can't be imported, and how will that happen? How much assistance will you get? The ability to migrate all of your old data to the new system will save you a lot of time and can reduce the likelihood of losing data you'd like to keep.
- **Do they have other customers in your industry or at your scale?** What case studies do they have demonstrating the benefits customers have achieved from using the vendor's technology?
- **What's on their roadmap?** How are they working to improve the product, and what are they planning to add?

Check out the [Vendor Comparison Scorecard Template](#) in the resources section! ✨

## CHAPTER 04

# Get buy-in

Asking for new resources can be a challenge at any time. The best way to convince stakeholders or decision-makers is to be prepared — do your research, understand all the ways this purchase will help, and pitch your plan.

### Here are some things to keep in mind:

- Go into your software evaluation process knowing the potential objections decision-makers might have, and consider those objections yourself when evaluating the tool.
- When you present your findings, address how solving your support challenges will benefit the company as a whole and help meet its goals.
- Identify an internal champion from outside your team (perhaps from IT or legal, for example) to back you up in your decision. Test your pitch with them to solidify your talking points, get feedback, and maybe even surface some other objections that you hadn't already considered.

# How to address common objections to new software

Here are some ways to handle the most common challenges you'll face when proposing a new customer support tool.

## 1 Price

*First, be clear on what the total cost is for your existing systems so you can make a fair comparison.*

### If they say:

- "Support can make due with Outlook/Gmail, a Gmail extension, or something free for a bit longer."
- "It's too expensive."
- "We don't have any budget left," or "I need to use this budget somewhere else."
- "I can get a cheaper version somewhere else."

### Respond by:

- Projecting how much will be saved (as measured in time, resources, and headcount) if you add the new software.
- Demonstrating how you're getting a good deal with comparison data on costs for similar tools as researched in your evaluation process.
- Explaining how the cheaper solutions won't be able to scale with the company as it grows and will create more switching costs and complexity in the long run.

## 2 Resistance to change

*People outside of the support team may be comfortable with the way things are now, often because they do not see any of the challenges you are already facing.*

### **If they say:**

- “I’m OK with our current situation.”
- “What’s wrong with what we have now?”
- “Support can make do.”

### **Respond by:**

- Articulating why this new tool works better than another and naming some specifics about the ways your current tool or process isn’t working.
- Sharing reasons you need a purpose-built solution. Explain that you need a tool that focuses on meeting the needs of the customer support team and how that will deliver better customer experiences.
- Telling a compelling story about the higher quality of service this tool will allow you to offer.





### 3 Unclear ROI

*The financial benefits of your proposed new software should already be covered in your initial presentation, but you may need to highlight some specific aspects.*

#### **If they say:**

- “This tool doesn’t help other departments,” or “It’s not big enough.”
- “Why do we even need to invest in a customer support tool?”
- “It’s just not important right now.”

#### **Respond by:**

- Breaking down the value you expect in saved time, reduced manual work and duplicate work, and increased focus on customer quality. If possible, show your savings in real dollars using your internal figures.
- Tying it back to company goals and long-term business growth. A great support experience can make or break a customer’s relationship with your business. Your customer support team can either be a huge business driver to keep every hard-earned customer, or a source of frustration and churn.
- Explaining how you’ll measure success from this tool and offering to report regularly through the process.
- Presenting the risks of taking no action. If your current tool isn’t good enough, it will cost real money.

## 4 Desires to wait for “the perfect tool”

*Switching software is exciting — it can feel like a chance to solve every problem all at once. Realistically, of course, no one tool can achieve that goal.*

### **If they say:**

- “We already have a tool that works for multiple teams and will suffice for support.”
- “We want to adopt one platform with features for multiple teams, and support is not the decision-maker.”
- “We need these specific features because we’ve heard of them and assume we’ll need them.”
- “X company is the safest bet because they do everything.”

### **Respond by:**

- Surfacing the costs associated with enterprise-level tools (both upfront costs and administrative staff and training). What makes sense for companies with thousands of employees doesn’t make sense for a growing business that needs to move quickly and focus on delighting customers.
- Sharing your customer service vision. You don’t need to be in every channel, and it’s better to offer great service in key channels than poor service everywhere.
- Sharing the costs of staying put. Taking no action is not free: It means continuing to pay the costs of the problems and limitations that triggered your evaluation process in the first place.

## 5 Fear of migrating

*Migrating to a new platform can be just as time consuming and difficult as moving to a new house, so you should anticipate some hesitation from your colleagues.*

### **If they say:**

- “The migration process takes time.”
- “Switching tools is a headache.”
- “There’s too much going on right now.”
- “We don’t have the capacity to implement the product.”

### **Respond by:**

- Demonstrating that you have already done your research and developed a clear plan that covers data migration, educating your team, and implementation in a way that won’t disrupt service to your customers

**Remember — try your best to not be defensive.** It's normal for people to challenge any spending decision; they're doing their jobs and thinking through all the potential consequences. And there may be legitimate concerns that should be considered and addressed.

People from other departments can help you think critically and may actually end up changing your opinion. At the end of the day, they need to understand how it helps the company, what it's going to change, and whether the change is worth the price tag.

**Recommended reading:** [9-Step Guide to Switching Help Desks](#) 

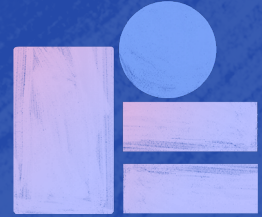


## Bonus Resources!

Start your buying journey with these interactive worksheets:

- Customer Support Tool Evaluation Checklist
- Customer Service Assessment Worksheet
- Customer Support Platform Comparison Scorecard

# Customer Support Tool Evaluation Checklist



## Step 1: Identify your needs

- Define your goals and vision for customer service.
- Audit your current systems and examine your processes.
- Assess your resources.

## Step 2: Find the right type of solution

- Understand what types of solutions are available and which make the most sense for your needs.
- List your “must have” features. What specifications, features, or functionality do you require?
- List your “nice to have” features and prioritize them.
- Determine your potential budget.
- Start your vendor search and refine the list of possible options.

## Step 3: Evaluate your options

- Determine who needs to use the software (individuals, teams, different departments, etc.?) and enlist stakeholders in the evaluation process. Consider all the potential uses and stakeholders when starting your initial search.
- Make a short list of the products that seem most likely to fit your needs.
- Schedule exploratory calls, demos, or free trials of those products to see how they will work for you and your team.
- Evaluate the total cost of each solution, including implementation, integrations, training, and support.
- Fill out the vendor comparison scorecard.

#### **Step 4: Get buy-in**

- Enlist an internal champion to help advocate for the tool.
- Present your case to stakeholders.
- Prepare to handle the most likely objections.
- Secure buy-in from stakeholders.

#### **Step 5: Purchase and implement**

- Swipe that business credit card (or as is the usual case, share the invoice with your accounting team).
- Review your plan for implementing the software.

# Customer Service Assessment Worksheet



These questions will help you create an honest appraisal of the service you deliver today. Think about your current customer service activities and discuss the following areas:

## Customer Experience

**Review your sources of customer experience information (customer satisfaction surveys, NPS comments, exit surveys, your support team's own feedback, and software review sites).**

What themes are you noticing? Are they wanting more chat support? Better onboarding? Faster response times?

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**Where do your customers most want to talk to you?** Are you delivering service on those channels today? Which channels can you offer the best service on with the team and the resources you currently have?

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**How quickly are you responding to customers?** How consistent are your response times?

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# Processes

**What are some gaps in your support processes? What areas would you most like to improve?**

Think about which tasks are taking a lot of time and effort and whether those pieces could be automated.

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**Review your most common processes.** Are they still useful? Can they be improved upon or replaced? Are you doing anything just because it was set up that way years ago?

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**Do you currently have a support tool?** What, if anything, is lacking in its features or capabilities? What's working well that you would like to retain in a new tool?

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**Are you having trouble managing duplicated work, keeping track of customer questions, coordinating responses across multiple teams, and delivering up-to-date answers?**

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**What are some of the most time-consuming tasks that your team regularly performs that could be automated or made more efficient?**

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Are you having trouble connecting separate customer data sources, and is that affecting your service quality?

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Is your queue management working as well as it should be?

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What are the primary reasons you are considering new software?

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## Data and Insights

How are you currently identifying, collecting, and organizing all your customer feedback, feature requests, bug reports, and use cases? Do you have systems set up to manage those? Are the data and insights from those systems readily available?

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Do your existing data and/or processes give you insights to help you understand the pulse of your business? For example: Are you able to determine a relationship between customer satisfaction scores and customer retention?

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**Do you have a way to measure the impact of customer service efforts on the business?**

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**Are you able to identify areas that need improvement in your customer service and where errors or delays are occurring?**

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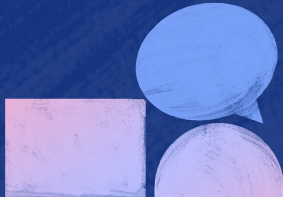
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**Are you able to see all of the historical interactions and data from clients in order to effectively manage your relationships with them?**

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# Customer Support Platform Comparison Scorecard



Features and Capabilities	Vendor 1	Vendor 2	Vendor 3
<p>List your must-have features, and then score each vendor according to how well it matches your ideal feature and its overall capabilities.</p> <hr/> <hr/> <hr/>	<p>Scores (1-5); 5 is best 🌟</p>		
<b>Total Scores (per Vendor)</b>			

User Experience	Vendor 1	Vendor 2	Vendor 3
Overall product experience is clear and consistent			
Interface is simple and easy to learn for customer service agents			
Customer's interaction points with the system are simple and appealing			
Easily accessible and clear navigation throughout			
Good load speed and page responsiveness			
<b>Total Scores (per Vendor)</b>			

<b>Implementation</b>	<b>Vendor 1</b>	<b>Vendor 2</b>	<b>Vendor 3</b>
Initial setup is fast and straightforward			
Training and onboarding help is available			
Minimal disruption to existing service during the switchover			
Simple way to onboard service team members			
Offers migration tools or assistance to preserve data from existing tools			
<b>Total Scores (per Vendor)</b>			

<b>Scalability</b>	<b>Vendor 1</b>	<b>Vendor 2</b>	<b>Vendor 3</b>
Has existing successful customers at the scale you anticipate growing to			
Offers flexibility to use new features and plans as your grown			
Enables knowledge base and other self-service features			
Includes helpful reporting to understand your business			
Includes automation and workflow features to improve productivity			
Can allow multiple teams to work in one account			
Has a well document, extensive API to allow for custom integrations			
<b>Total Scores (per Vendor)</b>			

<b>Pricing</b>	<b>Vendor 1</b>	<b>Vendor 2</b>	<b>Vendor 3</b>
Has a well document, extensive API to allow for custom integrations			
Offers flexibility to use new features and plans as your grown			
Accepts payments in your preferred currency and form			
Available discounts that apply to your company			
<b>Total Scores (per Vendor)</b>			

<b>Technical Requirements</b> <i>Integrations, Data Security, Reliability</i>	<b>Vendor 1</b>	<b>Vendor 2</b>	<b>Vendor 3</b>
Integrates with your existing business tools and data sources			
Complies with relevant security and privacy requirements and laws			
Provides backup and recovery capabilities			
Documented high uptimes			
<b>Total Scores (per Vendor)</b>			

<b>Vendor's Quality of Service</b>	<b>Vendor 1</b>	<b>Vendor 2</b>	<b>Vendor 3</b>
Timely response to support requests			
High quality, helpful service interactions			
Support available on your preferred channels			
Accessible and useful self-service tools			
Account manager available (if required)			
Customer community offered			
<b>Total Scores (per Vendor)</b>			

<b>Credentials</b>	<b>Vendor 1</b>	<b>Vendor 2</b>	<b>Vendor 3</b>
Solid customer case studies and/or customer references			
Demonstrated ROI			
Positive product reviews from similar companies			
<b>Total Scores (per Vendor)</b>			

Enter the total scores from each criteria (the purple rows!) in the chart below and tally up each vendor's complete score.

<b>Criteria Scores</b>	<b>Vendor 1</b>	<b>Vendor 2</b>	<b>Vendor 3</b>
Features & Capabilities			
User experience			
Implementation			
Scalability			
Pricing			
Technical Requirements			
Customer Service			
Credentials			
<b>Total Scores (per Vendor)</b>			

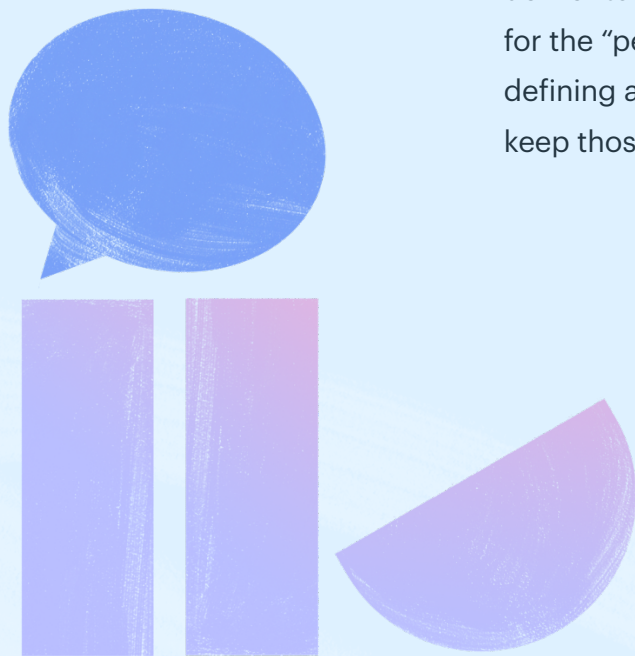


## Make the right decision for your business

There are many solutions on the market, from stand-alone tools to all-in-one platforms, and searching for the right one can get overwhelming. But if you know what you need the software to help with, you can quickly narrow down the choices and select the solution that best aligns with your unique challenges and requirements. From there, the process will be much more straightforward.

Remember, it all starts by understanding exactly what you're looking for, then reviewing the available options. Once you have settled on your short list, do more extensive research — get in touch with vendors, watch videos, do trials, read reviews, and most importantly, check that your options align with your core requirements.

No matter which software you choose, it's the service you deliver to your customers that matters. Don't let the search for the "perfect customer support software" stop you from defining and delivering the service experience that will keep those customers coming back.





# About Help Scout

Help Scout is a complete customer support platform that helps growing businesses deliver world class support. It includes a help desk, shared mailbox, and knowledge base capabilities, plus live chat and reports — all your must-have customer support tools in one place.

Help Scout gives you the simplicity to start right away, the power to grow, and the human-centered approach to turn customers into advocates. We're the software behind 12,000+ growing businesses, enabling them to spend time and resources on what matters: supporting customers, not learning software.



## Why Help Scout?

**We're easy-to-use.** We're designed with simplicity in mind because we want you to spend more time helping customers and less time configuring your software. With Help Scout, you don't need to hire an admin, and you can get up and running quickly. By quickly, we mean you can get set up in an hour and become a customer champion in less than a day.

**We're powerful to scale.** Help Scout can be as simple or as elaborate as you need it to be. We have customers with global teams and tens of millions of customers of their own that use our platform. As your needs get more complex, Help Scout is ready with advanced features, automations, integrations, and more to power your team as it grows.

**We're committed to customers — ours and yours.** While other platforms enable wait times and frustrating deflection tactics — and fail to deliver world-class support themselves — Help Scout is completely focused on creating the best possible experiences for our customers and yours. We are also a Certified B Corporation, which means that beyond profit, we're committed to having a positive impact for employees, communities, and the environment.

**Get everything your business needs  
to deliver world class customer support  
in one simple, scalable platform.**

