



10 things to consider when choosing a customer service platform

The Ultimate Checklist



72% of customers switch companies

after just ONE negative support experience.



Bad customer service = higher customer churn.

So, how do you ensure that your business serves customers quickly and efficiently?

A **customer service platform (or a helpdesk)** holds the key.

The biggest advantage of a customer service platform is that it helps streamline and organize customer requests at scale. It makes it possible for your support team to delegate these queries, collaborate faster, and build workflows that optimize their productivity.

In simpler terms, a customer service platform **brings order to chaos**.

That said, how do you choose the right one for your business? In this guide, we'll look at 10 questions you need to ask while investing in a customer service platform.

1. Is it easy to use?

If your support staff find it complicated to use a tool and are grappling to navigate the interface, then how do you expect them to serve customers on time?

Unfortunately, this is the problem with most helpdesks. They force customer support teams to get **acclimatized to a completely alien interface, workflows, and even terminologies**. For instance, the simple task of assigning and tagging customer emails gets complicated.

When asked about Zendesk, a reviewer noted; *"Nothing... this system is confusing, difficult to implement, and is not user-friendly."*

Here's a thumb rule: your customer service platform must not make users change their behavior drastically.

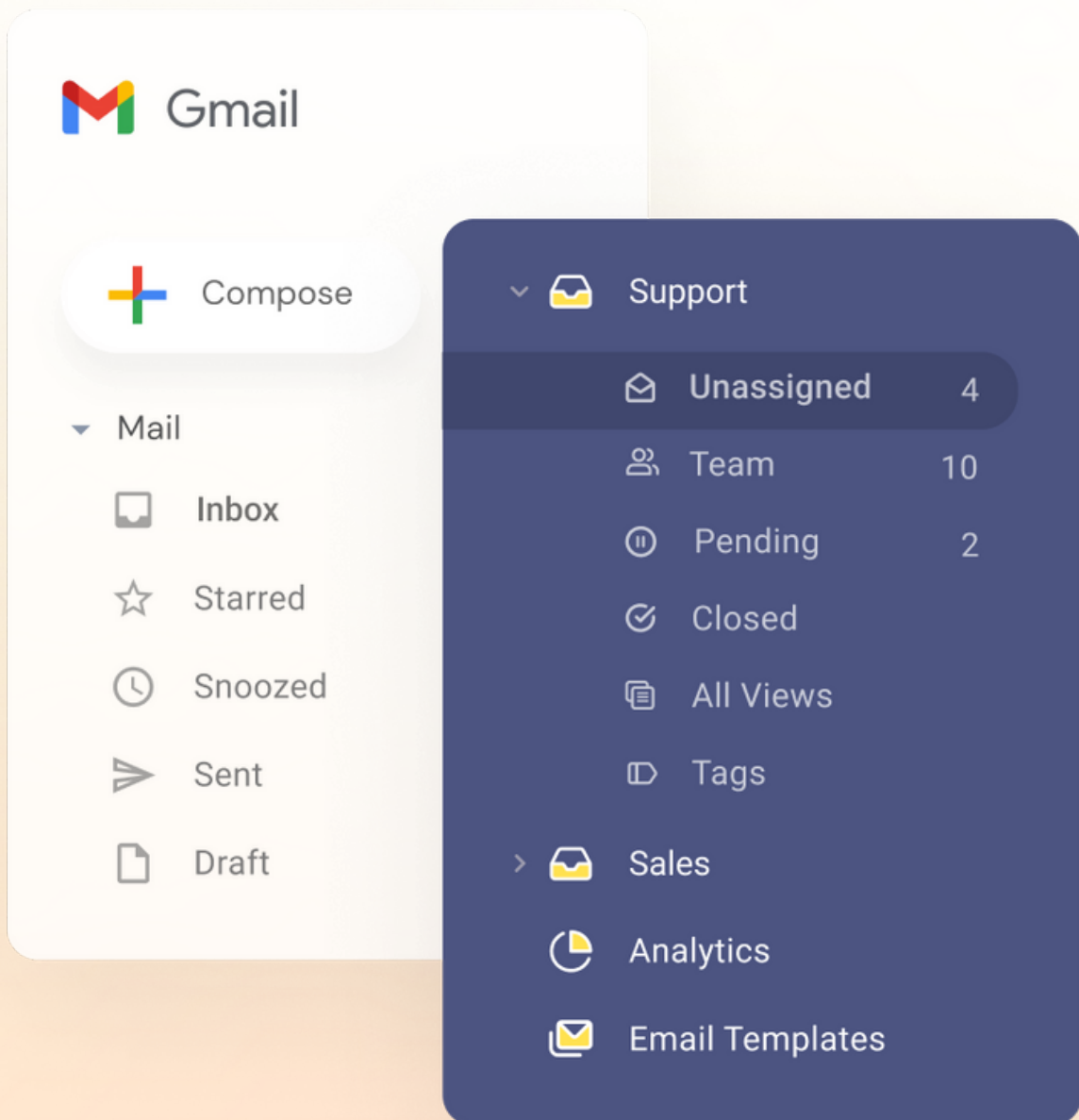
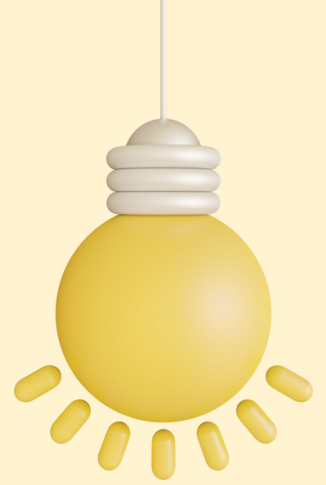
What to look out for?

- Do you find the tool overwhelming to learn?
- Are you able to onboard your team and train them easily?
- Are you able to configure workflows without contacting support?
- Is the interface easy to navigate?
- Do you have difficulty finding or accessing a particular feature?
- Do you notice any complex terminologies?



Pro tip

Look for a platform that **fits into your existing workflows**. For instance, if your team is on Google Workspace, you can opt for a tool that works within the Gmail ecosystem. Like Hiver.



2. Does it help 'humanize' customer support?

Have you ever reached out to a brand's customer support department via email and received a response from an ID such as support@companyname.com or info@companyname.com?

Especially one with a subject line like, "**Re: CASE76543**"?

Or even worse, a weirdly formatted email response that starts with: "**##please do not write below this line##**"?

This is what happens when companies use archaic ticketing systems for customer communication. In such a scenario:

- ✓ Queries are converted into random ticket numbers
- ✓ Email responses look weirdly formatted
- ✓ Responses go from your company's email inbox and NOT from the agent who is working on the query

We're not saying ticketing is BAD. But, it brings about a shift in mindset. Where agents mainly focus on resolving as many tickets as possible, as opposed to genuinely helping customers.

Ticketing systems = inhuman customer service

The emphasis should be on how you make customers FEEL. And you need to look for a help desk that would enable this.

What to look out for?

- Do the emails look clean and properly formatted?
- Are the emails not prefilled with weirdly formatted ticket numbers?
- Is the sender's name an actual person and not your company's customer service email ID?



Hiver helps us have natural conversations with customers. It's so much better than the ticketing model we had before.

Scott Gellatly
General Manager, itGenius

itGenius

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3. Does it scale?

Short-sightedness can be the bane of buying decisions. If you're in a fast-growing business, it is only prudent to buy a software solution that scales as fast as your growing customer service needs.

If your software doesn't scale, your agents will be burdened with keeping up with the mounting queries; going back to the drawing board after implementation will be a very costly decision for your business.

Think of it like this: **when you grow from 10 users to 100 users, how much extra is it going to cost? Can you afford it?**

What to look out for?

- Is the software used by large teams? Check for case studies, if any.
- Does it allow for unlimited users?
- Does it support add-ons and integrations?
- Does it offer customizable features? (eg: custom reporting)
- Does it offer automations?
- Does it offer omnichannel support?



A platform like Hiver scales with you. It allows you to manage conversations at scale. It equips support teams with powerful features including **automations, integrations, omni-channel support, and advanced analytics** to effectively service their growing customer base.



Hiver has helped our support team become 80% more productive. We now reply faster to clients, and my team is more organized than ever.



Sonia Cruz

Owner Care Manager for South America



4. Does it allow integrations/add-ons?

Speaking of scaling, a customer support software is probably not the only solution your business uses. You might use JIRA or Asana to track projects, and Slack to communicate internally.

When this is the case, **data tends to get siloed and it's easy to lose sight of your customers' end-to-end journey**. If you've witnessed customers repeating their issues multiple times while contacting support, this is why.

Say your support team is handling a customer query that requires help from the tech team. You would have to forward the query to tech and wait for them to acknowledge it.

Chances are you might have to verbally follow-up with them to ensure the forwarded email doesn't get missed. Once they see it, they go ahead and create a task on a tool like JIRA.

Wouldn't it be more convenient if **your customer support solution allowed you to create a JIRA task** for the tech team right at the start? This will drastically reduce follow ups and the back and forth that ensues.

What to look out for?

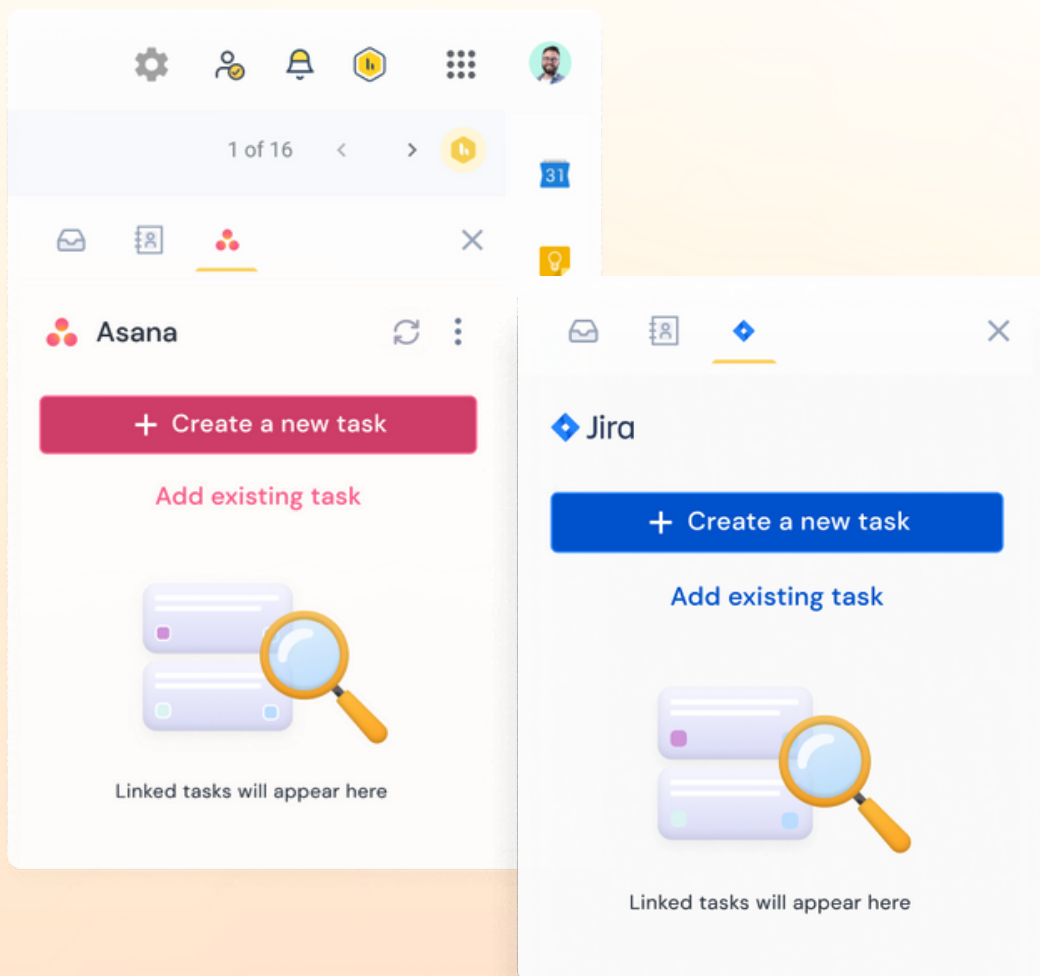
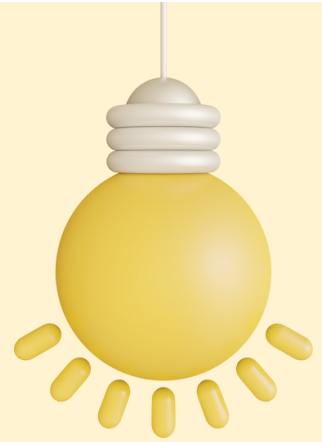
- What integrations does the tool offer?
- Do they cost extra and if so, how much?
- Do they offer custom integrations?



A customer service platform like Hiver offers several important integrations with tools like Jira, Asana, Salesforce and Zapier. This makes it easy for multiple teams to work together on customer queries with ease.

Pro tip

While choosing a support tool, be aware that some features may actually come as add-ons and cost you extra. For example, **you'll have to pay extra to use the Round-Robin assignment add-on in Zendesk.**



5. Does it offer multi-channel support?

Another factor to consider while looking for a customer service tool is its ability to offer multi-channel support.

That's because **customers today use different channels at different instances** to interact with brands.

If customers want to know about your product warranty, some might call your support team. Some might send an email. Some could even want to look up your FAQ page.

So, the question is: **are you there for your customer across these touchpoints?**

What to look out for?

- Does the tool offer email support?
- Does the tool offer live chat support?
- Does it offer a knowledge base functionality?



Hiver, for instance, ticks all these boxes. It can help support teams manage both **email and live chat queries** – from within Gmail. Teams can also build and maintain a **knowledge base** using Hiver, enabling better self-service amongst customers.

Account Payables

Assigned to: Charlie Wood

Activity

Charlie Wood @William could you please take a look at this?"

Charlie applied tracking tag

You assigned to Charlie Wood

Assign To

Search

- Brenda Chapman
- Charlie Wood
- Etta Matthews
- Lilly Clayton
- William Foster

👋 Hey! How can we help you today?

Search

Categories

Getting Started

Learn more about how to get started with your acme account

Security Compliance

Learn about all security compliance of our company

Account Management

Learn more on how your account is managed

Chat with Acme Inc

package. Can you look into the matter asap?

Hi there! someone will be with you in a moment.

Bot

Hi Bruce, can I have your order number please?

Charlie Wood

Order No: #124567

Hey Bruce, thanks for the information. My operations team will contact you soon.

Charlie Wood

Type your message

6. Does it enable seamless internal collaboration?

It's common for support teams to have discussions around customer queries. Many times, agents either use email or a messaging app like Hangouts or Slack to collaborate internally.

The problem with these approaches is that it takes a lot of time to explain the context, which in turn leads to a lot of back and forth. Consider this:

Jack is working on a customer email.

He realizes he needs help from Susan.

He forwards the customer email to Susan.

Susan wants more information about the customer.

Susan writes a new email to Jack about this.

Jack replies to Susan.

Susan then replies to the customer.

Sounds overwhelming, doesn't it?!

Which is why the tool you opt for must allow agents to collaborate seamlessly. An example of a good customer service platform that ticks this criterion is Hiver.

Hiver offers Email Notes – a feature that allows agents to have contextual discussions right beside an email thread. **All you have to do is tag a colleague and write your message.** The tagged agent is notified and can respond accordingly.

What to look out for?

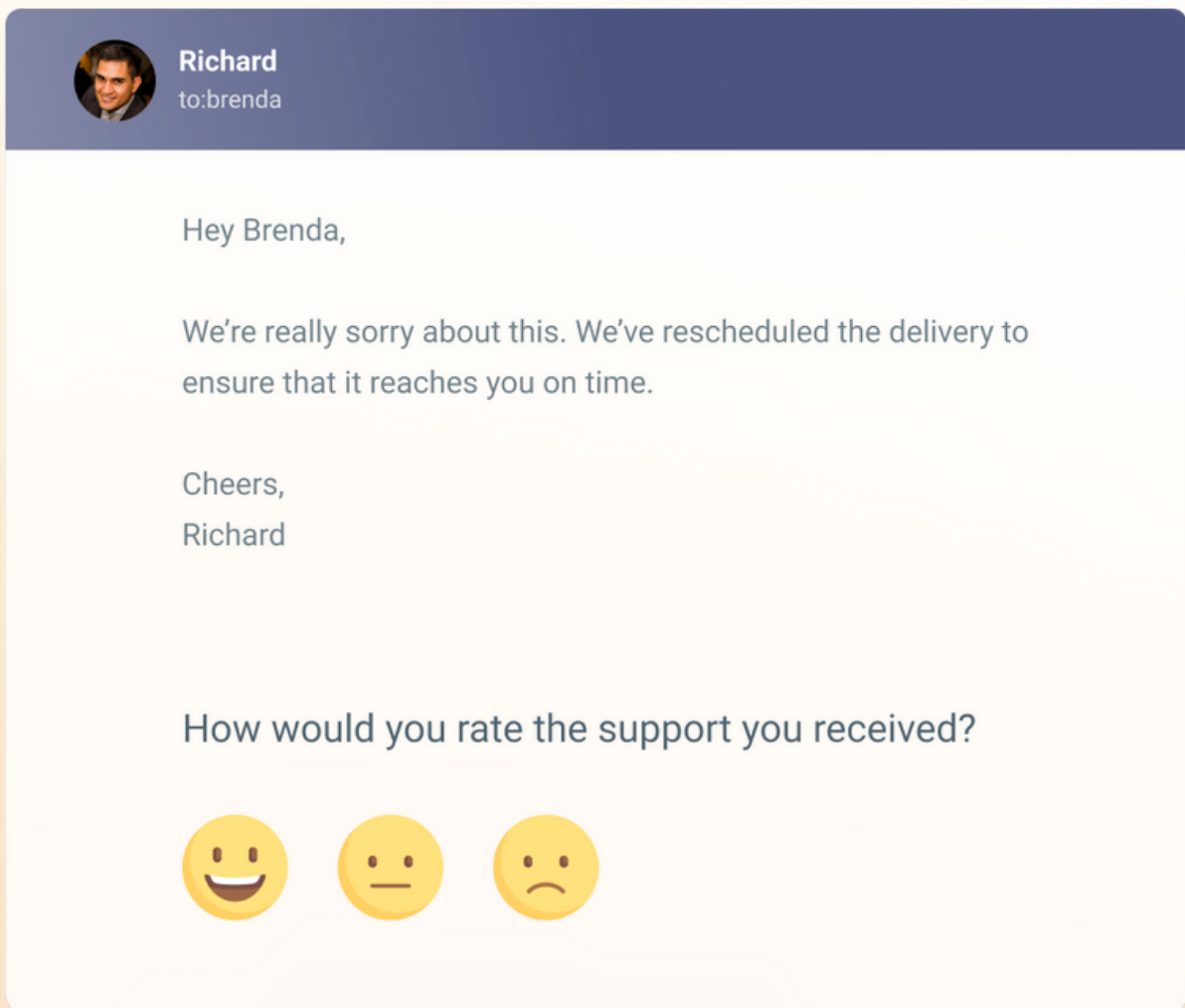
- Are Internal chats neatly separated from customer conversations?
- Does it have the ability to tag relevant people – even from other teams?
- Are Chats easily accessible? And do they help you set the context?
- Is the internal chat searchable and does it allow you to look up old conversations?



7. Does it allow you to collect feedback?

Feedback collected at the end of a query resolution provides you with insights into how your customers feel. It tells you what you can do better, and what you're good at. And that's why your helpdesk should enable you to collect and analyze customer opinion.

Hiver makes it easy to **create and embed CSAT surveys in customer emails**. Survey questions can be customized to suit your business needs, and the survey can be embedded in the body of the email.



Also, Hiver gives you complete control over which emails should and shouldn't contain surveys. You can decide whether to include surveys in every email or just a select few. As an admin, you can choose who on the team is permitted to add surveys in customer emails.

You can also use the CSAT Reports in Hiver to **identify dissatisfied customers and understand reasons behind their dissatisfaction.**

What to look out for?

- Can you add surveys to emails with ease?
- Does it have the ability to customize questions?
- Does it allow customers to share open-ended feedback?
- Does it give you complete control over when to send surveys?
- Does it analyze and send reports on the collected feedback?



8. Does it offer reporting and analytics?

You've probably heard the adage, "*What gets measured, gets managed,*" often attributed to Peter Drucker.

Analytics and reporting features should thus be high up on your list of priorities while choosing your support software.

Which metrics would you want your customer service ticketing software to track? You might want to keep an eye out for:

- ✔ **Quantitative metrics** that allow you to calculate absolute numbers like average handle time, time to first response, interactions per resolution, the volume of requests, common trends in customer issues, and unsolved requests.
- ✔ **Qualitative metrics** measure the quality of service offered like Customer Satisfaction Score, Net Promoter Score, and Customer Retention Rate.

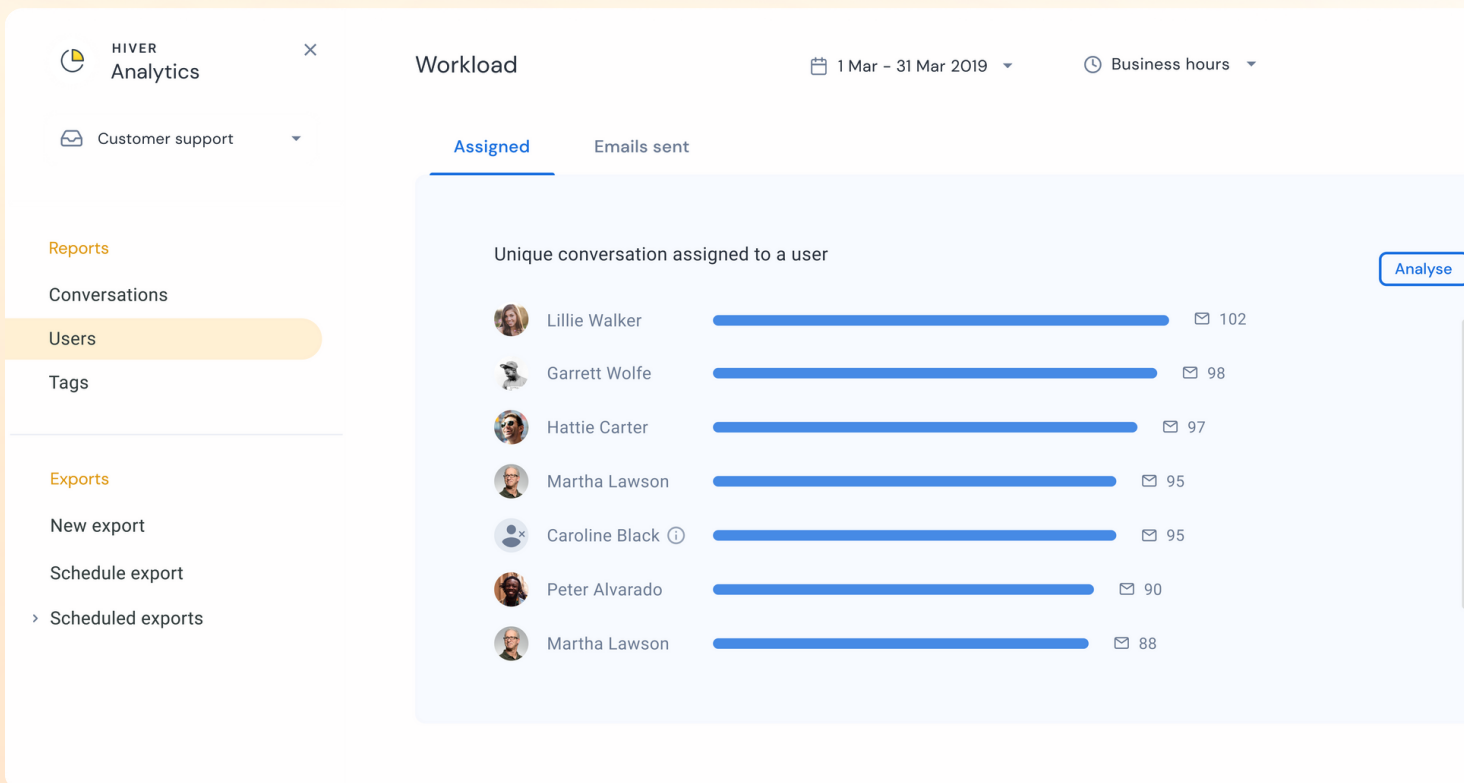
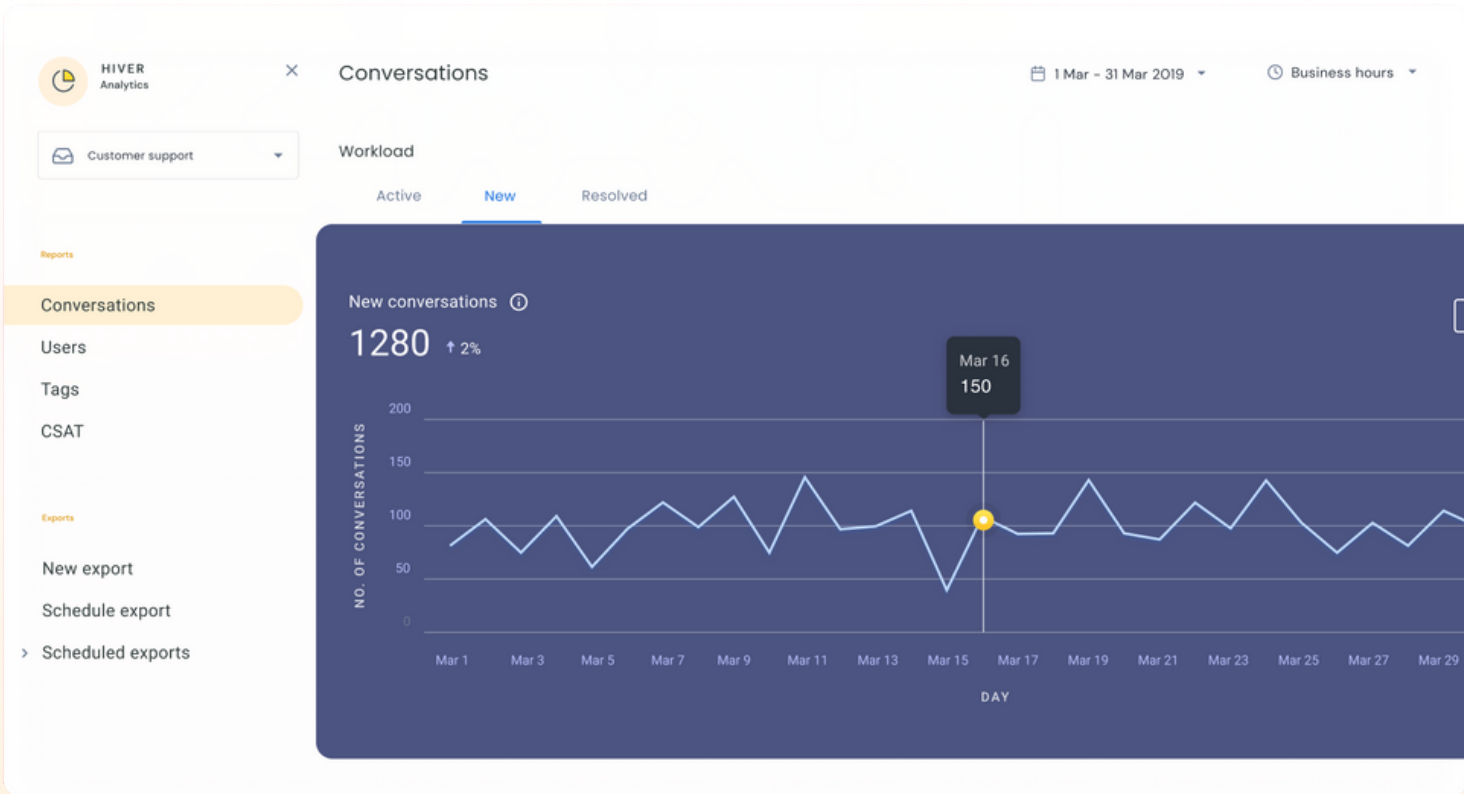
You want a customer support solution that can help you track these so that you can understand patterns, identify bottlenecks and design mitigation strategies accordingly.

What to look out for?

- Does it help you track how many conversations have taken place?
- Does it provide insights on response and resolution times?
- Does it tell you the workload of team members?
- Does it analyze Customer Satisfaction (CSAT) ratings?
- Does it offer custom reports?



Hiver closely monitoring changing trends in customer requests with **actionable real-time data**, and provides detailed insights into your team's performance and customer service quality through various reports.



9. Does it have automation capabilities?

A customer service team deals with a lot of repetitive tasks on a daily basis. Handling them manually can get not only time-consuming but also incredibly chaotic and expensive.

After they automated their customer service processes, UK-based **Get It Made**, a manufacturing-as-a-service firm, **saw a ten-fold growth in their business** without increasing the size of their team. They achieved 100% customer email response rate despite COVID-related lockdowns and improved their efficiencies by 250%.

Choosing a customer support platform with right automations can, therefore, help improve productivity and ultimately, the quality of support you deliver.

What to look out for?

Does your customer support solution:

- Make it easy to setup the automations?
- Allow ease of modification/deletion of workflow automation?
- Automatically route specific requests to the relevant specialist?
- Offer round-robin assignments?
- Automatically organize emails based on their categories?
- Offer intelligent email template suggestions?



Hiver makes automating customer service tasks incredibly easy, without removing the human element from your strategy. For instance, here's how you can create an automation to **add a tag and assign all refund-related emails to a team member using Hiver.**

The image shows a screenshot of the Hiver automation configuration interface, divided into three main sections: 'When', 'If', and 'Then'.

- When:** A dropdown menu is set to 'New conversation (inbound) is received'.
- If:** This section contains two conditions connected by an 'OR' operator.
 - Condition 1: 'Subject' contains any of 'refund'. There is a 'Match case' checkbox which is unchecked.
 - Condition 2: 'Body' contains any of 'refund' and 'refunds'. There is a 'Match case' checkbox which is unchecked.Below these conditions is a dashed box labeled '+ AND condition'.
- Then:** This section contains two actions connected by an 'AND' operator.
 - Action 1: 'Assign to' is set to 'Ryan Bator'.
 - Action 2: 'Add tag(s)' is set to 'Refund'.Below these actions is a '+ ADD action' button.

10. Do they have proactive customer support?

We cannot stress enough how important ease-of-access to support is while choosing a customer service software.

Your real journey starts post-deployment and it's important that you've got a reliable support team to reach out to when there's an issue.

What to look out for?

- Do they offer 24x7 chat and email support?
- Is access to support free?
- Do they offer a self-service portal that answers FAQs?
- Will you get a dedicated customer success manager ?



The ease of access to a customer service solution's helpline plays a huge role in determining whether it makes the cut for your business.

With Hiver:

- ✓ You'll be connected to trained agents immediately
- ✓ You won't be charged extra for support
- ✓ You'll access 24x7 customer support for free
- ✓ Get instant answers on its knowledge base



Hiver is simple and no-fuss. We were able to hit the ground running from day 1, and the customer service is fantastic.

Luke Thompson

Co-owner, Visiting Angels - Wisconsin



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Conclusion

When the stakes are high, it's easy to miss certain red flags.

Some of the **common red flags include:**

- ✓ Unnecessarily complicated plans and hidden charges
- ✓ Unresponsive customer support teams
- ✓ Complicated help documentation
- ✓ Overpromising sales reps relying only on the future potential of the product
- ✓ Lack of credible reviews/reference customers

These early warning signs signify serious problems at the vendor's end. Steer clear.

Finally,

- ✓ Ensure that you also take your team's considerations into account. They're the ones who'll be using the tool on a daily basis.
- ✓ Access a free trial version and encourage your team to use it to truly understand and gain a complete picture of a software's pros and cons.
- ✓ Study review sites diligently and reach out to current and past users who share your industry, size of business or reason of needing a customer support solution.

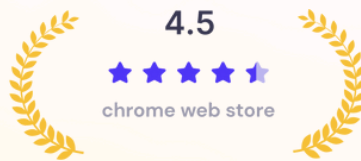
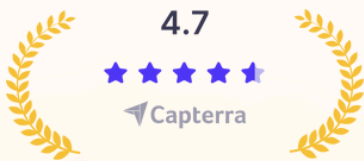
Choosing the right software can be a daunting task. But when you make the process tangible and accountable, you can make better and effective decisions.



Join the 8000+ teams that use Hiver to deliver brilliant customer service

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Or, get in touch with us at



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