

How to Select Customer Support Software

WHITE PAPER

Customers are the heart and soul of any company. Your response to their needs and problems can directly affect their opinion of you as an organization and their desire to continue doing business with you. You need a Customer Support product that allows you to record their issues, provide them with status updates, and ensure that their problems are resolved satisfactorily and efficiently. Your choice in software should help you to both provide top-tier service to your customers and assist your team on the back-end in completing their jobs as efficiently as possible. This guide will help you outline some of the features and tools you may want in your team's Customer Support solution!

Configurability and Flexibility

Some companies may elect to build their own Customer Support solution to ensure they get all the features and configuration needed to support their customer base. However, the resources necessary to create an in-house solution can be draining on your team. When appraising off-the-shelf software, keep in mind it must be flexible enough to allow you to limit customers' permissions so they can't access sensitive information. An easy-to-configure system with customizable visibility tools is best.

Additionally, if you want to handle both internal and external customer support within one package, make sure the options you look at allow for that level of flexibility.

Process Support and Workflows

Customer Support solutions often need to support processes or workflows, as well as determine the requirements necessary to close an issue. Make sure to check with your vendor to understand how each software package works and whether it provides you with the visibility and accountability your company needs.

Budget Considerations

Pricing can vary significantly among software solutions, with some products offering free services and others costing tens of thousands of dollars. Before you begin your search in earnest, be sure to solidify a budget and understand what your organization can afford. This will help you to narrow your options and focus on the solutions that fit in your price range.

Architecture

There are three basic architectural models that Customer Support software vendors use to run their programs. Each model has its advantages and disadvantages. Understanding these benefits and drawbacks, as well as how the models themselves work, can help to inform your Customer Support software decision!

For hosted or cloud-based solutions, you do not own the software but are leasing or renting it from a vendor who provides you access to it through a website. The advantage to this architecture is that server management is provided for you and all equipment expenses are incurred by the software vendor. The disadvantage is that you do not own the software and do not have direct access to the software or to your data. In some cases, the data you enter is not even yours anymore -- so be sure to understand the terms of your agreement before purchasing!

INSTALLED ON YOUR SERVERS

For "on premise" software solutions, you install the software on your own servers. Your team is then responsible for managing the server, data, and website. The advantage here is that you own your data. In many cases, you also own the software, and you can access your data directly in case you need to update or change it directly in the tables. The disadvantage, however, is that you must maintain the servers and the operational software -- and you need people at your organization with the know-how to do that.

LEASE

Some companies provide monthly or yearly leases for their products. The software may either be hosted by the vendor or installed on your servers. While less expensive to get started, this may prove to be a more expensive option as years pass. Make sure you understand where the break-even point is on either hosted or installed options, and see if you get credit for any dollars invested if you go from lease to own.

One additional note: if you decide to go for the owned solution or the leased solution, be sure to check if the database (such as SQL) is included in the software package or if it needs to be a separate purchase. Research this early in your discovery period so you can see how these costs may affect your budget.

Client/Server vs. Web-Based

In the past, Customer Support software often had to be installed on each PC at an organization before the program could be accessed and operated. These Client Side applications would then update the server with any appropriate information. Client/server installation provides an excellent way to allow your users to input their information. This method tends to be very secure and fast -- however, it can take a toll on the administration side, as there is a lot of manual work that must be done to deploy the software solution and maintain/manage it.

Because of the heavy drain on resources to administer this type of system, many Customer Support software providers have developed Web-based applications.

Web-based applications only need an Internet browser and a URL to operate. Nothing needs to be installed on the Client Side machines. You can operate the software using SSL to provide secure communications to the server. Web-based packages are not limited to any particular computer, and can be accessed by any device that can log on to the web. People on the go can use their laptops, tablets, or even mobile phones to enter and respond to tickets.

HOW CAN YOU TELL THE DIFFERENCE BETWEEN CLIENT/SERVER AND WEB-BASED IN A DEMO?

If you are required to load code on your desktop to begin the demo, you are not dealing with a vendor that offers a web-based solution. True web-based systems need only a URL to show a demo.

If a vendor sends you a file to download for their demo, you are not seeing a 100% web-based solution. The file either loads a client/server system on your desktop or is a complete “canned” demo.

Important tip: make sure to evaluate and demo the software you’re considering.

When choosing between client/server and web-based, make sure the functionality is comparable.

Pricing, Terms & Conditions and Hosting

Be sure to get a detailed quote when looking for pricing information -- don’t just accept the information you see on a vendor’s website! Pricing pages can be notoriously misleading, featuring low prices that may not reflect the actual cost after add-ons, fees, and more.

For example, a vendor may tell you that their solution supports Active Directory (AD) integration, but the summary quote may only reflect the price of the core solution. You may later find out, after purchasing, that AD is one of their add-on modules. You will then need to purchase this add-on functionality, driving your support solution price up higher than anticipated.

WHEN REQUESTING A PRICE QUOTE:

- » **Specifically point out what you need**, and make sure that what you see in the demo is included in the quote.
- » **Ask for a price sheet** that lists the vendors’ full range of solutions and add-on modules. Then, if your needs change, you will not suffer from sticker-shock when looking to add more functionality/features.
- » **Be sure to understand how the vendors structure their pricing.** Are they offering concurrent licenses or named users? Are licenses purchased in bundles or offered individually? Many vendors offer “standard,” “professional,” and

“enterprise” versions or other similar tiers. Research which features come with which tier and be sure you’re getting what your organization needs the first time you purchase.

Understand What a License Buys

Communicate with your vendor to understand exactly what a license buys. A few questions you might ask:

- » What can a licensed user do versus a non-licensed user?
- » Do you need a license for everyone that uses the product?
- » If you purchase 100 licenses, does that mean that only the first 100 people in your organization can access the product before you need to purchase more?

Some vendors only license the technical or support staff and allow unlimited usage by others within and outside the company. Make sure the vendor explains their licensing clearly so you can fit their offerings to your needs.

Hosted Applications

If you’re also evaluating hosted applications, make sure to compare license models. The hosted offerings may be different than software installed on your servers.

Communicate with your vendor to ensure you understand the exact terms of your hosted contract. A few questions you might ask:

- » Are you locked in for a set time frame, or can you terminate the agreement at any time?
- » If the contract is terminated, can you save your data?

On many hosted applications, the data is owned by the hosting company and cannot be returned to you if you end your contract. This will leave you with a hole in your support history and you may lose valuable information. It's important to talk with your prospective vendors and understand who owns the data before making your purchasing decision.

You can also request information on data security and downtime statistics from their hosting facility. This gives you a good understanding of their reliability and safety. You'll want to know their maintenance policies -- when it's performed and how it's done -- as well as backup policies and find out how long it would take to restore your system should data become lost or corrupted.

Customer Support and Training

SUPPORT OPTIONS

Vendors may offer multiple support options, either per incident or per year. Choose the support level that works best for your company. Support options may be tied to the number of licenses purchased and may vary across providers.

Ensure support is available when you need it: 24 hours a day, 365 days a year.

Support options may also be part of a subscription offering. These subscriptions usually bundle services such as upgrades and updates with unlimited support under one price.

No matter what provider and support option you choose, be sure the support quality meets your standards. If possible, look for reviews and pay special attention to what customers are saying about service. If the company you're investigating has a bad reputation, you should look elsewhere.

Search for a product that meets your team's needs with a support and service staff that provides outstanding service. Another good way to ensure you're getting top-quality support is to ask for references and even support survey results. A company with a stellar support team will be happy to provide that information-- they may even offer it as part of their sales pitch.

You might also search for a user forum for the product. Read comments made by customers to get an idea of what level of service you will receive once the purchase is made.

PRODUCT TRAINING

Most software solutions require training to ensure proper implementation. Request training options from your vendor when making your decision, and understand that there may be additional costs involved. Some companies offer video training options. Ask to preview the videos ahead of time to investigate their quality, as well as to gauge the company's teaching techniques.

If possible, consider on-site training. This is an option offered by most companies. On-site training allows software users to get more detailed training and configuration assistance. If on-site training is not possible, understand the vendor's remote training options.

Product Development, Releases, and Packaging

A vendor's release history can tell you a lot about the speed at which they update and add new features to the product. A consistent release history can mean the vendor actively improves their product, providing value towards maintaining subscription and support contracts. You can also ask for a copy of the vendor's road map for future releases and see the approximate time frame.

Ask if product updates are included in your support or subscription contract.

Releases not included in your support or subscription contract may incur sizable costs to you in the future.

Another key concept to understand is how the vendor packages its software. Some products are all-in-one, so you cannot pick and choose which features are enabled in the software. This may not be ideal for you if you do not need all of the capabilities.

Some packages come as a core system and offer additional modules. In this case, you pay for a base product that provides all the basic features, but may not include major functionalities such as email conversion, LDAP integration, or asset management capabilities. This type of packaging provides you with the benefit of picking and choosing what features to invest your dollars in.

Expandability and Scalability

Today's company of 50 employees can very easily be tomorrow's company of thousands. Any package purchased today needs to be flexible enough to handle any growth your company may have in the near future. Expansion can affect your decision in several ways.

USERS

As your company grows, it expands its user base. As a result, your support staff must evolve to continue to provide assistance. Any software package your company purchases must have a flexible way to expand licensed users.

SCALABILITY

A package purchased today must be able to handle the workload of the future. While you may only handle 50 tickets a day now, your software should have the capability to handle more than just that minimum without needing to upgrade or change settings.

FLEXIBILITY

Customer Support software can be useful across multiple departments of the same company. A software package that offers you the flexibility to configure submission pages for several different uses in multiple areas of a business will prove to be a powerful tool. Look for packages that offer the ability to separate issues and adjust the issues from service area to service area.

Vendor Reputation

Vendor reputation, customer base, and financial stability are all key factors in your decision to buy software. Ask yourself:

- » Does the company have a solid financial base? Can they prove it to you?
- » Are they for sale or have they been recently acquired? If they are for sale, why?
- » Can they provide customer satisfaction scores on support or training?
- » Can they provide references?
- » Are there other customers using the product in your industry?
- » What awards or recognition have they received?
- » Who are the vendor's customers?

Multiple Submission Methods

Multichannel submission is a useful feature for Customer Support software, so you may need to configure multiple ways for your users to submit and access issues. Some options allow users to submit issues on another user's behalf, submit directly through a web portal, submit issues via email or mobile device, or even submit issues through social media applications. Make sure your vendor supports the methods that are most useful for you.

Important Software Features

CONFIGURABLE EMAIL NOTIFICATION

Email, both incoming and outgoing, is an important part of the notification process for any Customer Support solution. Make sure the email settings are configurable so you can control when an email is sent. You should also be able to control the content of the email, so you can tailor the message to your company's voice.

CUSTOMIZABLE SYSTEM OPTIONS

Look for packages that offer customization settings within the interface itself. Some packages offer very complex configurability tools and need the assistance of vendor personnel to install and configure the software for you. This can incur some expenses, but may be worthwhile to correctly configure and use the product you've selected.

USER MANAGEMENT

The availability of a large and diverse set of user permissions and abilities allows for greater flexibility in how users can work in the software. Some packages use groups to control permissions, allowing access control for many users at one time. Another important feature to look for is whether you can upload users directly into the database, saving you valuable time. One way to do this is through integration with your existing Active Directory. Some products even offer the ability to connect to multiple domains, which may be useful for your organization.

REPORTING

The ability to report on data entered into the site is just as important as the features that capture the data. Look for a solution with a full range of pre-formatted reports, as well as the ability to create your own reports. This gives you the flexibility to provide powerful information to your management. Some products will offer the ability to schedule these reports to be delivered automatically, saving

time and effort.

MOBILE ACCESS

Mobile capabilities provide access to your team from any location. You can add, update, or close issues, and potentially even access a Knowledge Base remotely using your phone or tablet.

Conclusion

As with any business decision, doing your homework now pays dividends in the future. We've created this document to help you with that research in hopes that your decision leads you to more productive and profitable operations in the future.

We also hope that this document introduces Issuetrak as a vendor to consider when making your Customer Support software solution decision. If you want to learn more about Issuetrak specifically as a software solution, we encourage you to check out another of our White Papers, [Getting Started with Issuetrak](#)! Or you can reach out directly to our [Product Experts](#) for more information.