How to choose the right
customer service software

Kaizo

Before you jump into it...

Customer service software can make the difference between mediocre, good, and excellent customer experiences.

When your service teams are mismanaged and disorganized it's often a **result of manual operational systems** or **using different software for every activity** your company performs.

But deciding which tools are right for your business, choosing providers, and implementing a system is often an overwhelming task.

To help you narrow down your options, we'll start with the basics of customer support software: what it is, the different types, and how it benefits your team. Then, we'll wrap up with a step-by-step path you need to take before you settle for 'the one'.

The ABCs of customer service software

What is customer service software?

Simply put, customer service software is a tool to **help you manage support and service requests from a single, central location**.

More specifically, these tools will typically **improve the data handling of customer support requests**. It will help you collect, analyze, and report on customer queries more effectively and accurately.

You can also choose to use customer service software to manage or integrate with communication channels, including email, text, chat, and social media.

Best-in-class customer service software includes key solutions such as:

Agent workspace third-party integration

Case and major issue management

Omni-channel capability

Customer data management

Visual workflows and automation

Surveys, reports, and dashboards

Issue resolution

Agent-assist options

Performance analytics and management

Customer project management

An effective customer service software solution can help you improve the efficiency of your support agents, which leads to shorter customer support response times. And customers who don't have to wait long — are generally happier.

And isn't a happy customer the objective?

Categorizing customer service solutions

There are essentially five ways that the industry categorizes the software available for customer service.

As we review each category, it's important to consider **three key factors**: your strategic **goals**, your chronic **needs**, and the practical **limitations** that your business is currently under.

Considering the range of software capabilities — on one end of the spectrum there are basic services available that serve a single function while other software is designed to provide a suite of solutions at once.

It's common for leaders to implement more than one of these solutions simultaneously. However, according to our user testimonials, having an all-in-one software is ideal, if possible.

Single-function: messaging and chat tools

Messaging and Chat tools are great options if you do not require a full-featured help desk. These tools let you **add a chat box to your website**, thus offering your customers a way to contact an agent in real time.

Despite its simplicity, Deloitte reports that in 2022, chat functionalities have enjoyed the largest sum of investment compared to other contact channels. **Some systems offer chatbot options, while others put customers in touch with live support.**

Single-function: shared inbox software

A shared inbox is a collaborative space where agents can access requests from a shared, centralized location. Multiple accounts can be collected into one inbox. It allows your team to collaborate and respond to inquiries, complaints, and questions.

Single-function: knowledge bases

A knowledge base allows your agents access to tips, tricks, and information in a searchable format to make it more reachable. Should your customer require a specific solution, your team can immediately provide them with the answers.

Typically, it's offered in addition to tools like live chat or a help desk so that customers who can't find the right answer on Google can reach out directly to get the answers from you.

Multi-function: Customer Relationship Management (CRM)

CRM platforms connect all the data from your sales leads and customers in one place. Adopting CRM software is an industry-trusted strategy for success.

According to HubSpot's 2022 Annual State of Service Report, 95% of customer service leaders agree that a CRM platform is an effective way to increase productivity. **It can record and analyze meetings, calls, and emails to help improve customer service, drive sales, and increase revenue.**

It gives your agents access to a customer's file to see their history, interactions, and other relevant information. A good CRM tool is vital if your business wants to track and improve customer interactions.

Multi-function: Service/Help Desk software

Help Desk Software helps organize, manage, and respond to service-related requests. It can be used for external requests from customers or internal service requests from team members.

Some help desks even incorporate different customer service solutions into one by including tools like a shared inbox, a knowledge base, and live chat options. Others integrate with third-party providers to offer CRM software to help with customer (and agent) management.

Help Desk software enables businesses to resolve customer grievances more efficiently by automating the complaint resolution process with a ticket management system.

Basically, it lets you streamline customer conversations to create a better customer experience and agent experience.

The best customer service solution for your business will be the one that **helps your organization achieve its goals the most effectively**. Finding the right fit for your business means you have to know the type of support experience you want your customers to have. Identifying their needs and aligning them with your objectives will help inform your choice.

Why customer service software is your key to success

No matter the company, or industry, an improved focus on customer support is always an advantage. Customer service software allows better support and improved customer experiences.

Gaining loyal customers

Customers are likely to repeat their business with you if you provide seamless, effective support. Achieving a customer base with unwavering brand loyalty is a huge indicator of business growth. One major insight gained in the 2022 Zendesk CX Trends report directly ties business gains to metrics like retention, satisfaction, and loyalty.

Better ROI

Though some might consider investing in customer service software costly, not investing in updated systems is a huge mistake. **When workforce frustration comes down to clunky software and confusing operational procedures, it's not only your employees that suffer, but your bottom line as well.**

Increased efficiency

Dedicated support software features tailored to your business such as time management insights, knowledge base integration, CRM, and messaging tools are some of the biggest solutions driving businesses to adopt new software.

Automation is also a feature to look out for. It leverages machine learning so that teams can spend their energy solving complex customer inquiries.

Better customer insights

Identifying, collecting, and organizing feedback, feature requests, and bug reports lead to better customer insights. And when you understand your customers better, you can help them more effectively, which improves customer satisfaction rates.

Improved teamwork

Customer service is a collaborative activity. Agents need to always have access to their teammates and software can support that in many ways.

With customer service software, agents have access to all information, meaning you can reduce duplicated work. **It lets you keep track of customer queries and coordinate multiple teams' responses.** This way, you can deliver up-to-date answers.

Better reporting

Customer service software collates all your data and provides you with reports on various services. It helps you to better understand changes in team productivity and customer behavior. From these insights, you can then create directed strategies for improving customer service, instead of getting lost in the numbers.

Highly skilled agents

Your team saves time, has access to all information, gets to work better together, and has the opportunity to improve their service. What's not to love?

According to Zendesk, **only 17% of agents are "extremely satisfied" with the level of training they receive.** However, 78 % of senior leaders agree that service agents play a vital role in customer retention. Implementing the appropriate software can create an opportunity for your managers to integrate skills development into daily operations.

How do I know which software to choose?

We've provided you with a lot of information already but it's time to personalize.

Before you review the tools available on the market, let's do a quick exercise.

This 'Checklist for Success' will give you an opportunity to think critically about relevant software.

Checklist for Success

- [ ] Is an accessible interface important for my team?
- [ ] What are the operational pain points that my agents and managers face?
- [ ] How many agents do I expect to have in a year?
- [ ] What metrics will drive growth in my business?
- [ ] What capabilities do directors lack?
- [ ] What capabilities do managers lack?
- [ ] What capabilities do agents lack?

What budget will accommodate your ultimate solutions?

Software Evaluation Checklist

Finding the best solution for your business starts with identifying customer needs and goals, and aligning those goals with your own objectives.

So, where do you go from here to properly rate available tools?

Take a look at the checklist below!

Software Evaluation Checklist

- Is the interface user-friendly?
- Does this software solve our call center's operational pain points?
- Is the platform scalable and flexible?
- Can it generate insightful analytics for agents, managers, and directors?
- Has this tool been useful for directors?
- Has this tool been useful to managers?
- Has this tool been useful for agents?
- What ROI does the tool promise?

What budget will accommodate your ultimate solutions?

Choosing the right customer service software

Consider your budget

Some customer service software may be free, so budget won't be an issue, but others can run costly. Though, we have already pointed out that there is a significant ROI, it doesn't mean you can toss the account book out the window.

Your employee resources such as the number of agents, **may influence your decision and limit your options** when the time comes to choose the right customer service platform for your business.

Define your needs

Different tools offer different capabilities. So, decide which is most important for you.

Do you have scheduling conflicts, issues with QA, need better training, monitoring, coaching or reporting, automating interactions, etc.? **Whichever you decide, the main focus needs to be all about improving support for your customers, and improving the performance of your team.**

Consider the issues that you are currently facing, all impediments to improved performance, and decide on the platform that will solve most of your problems. It will provide you with a clear idea of how you want your customer service software to perform.
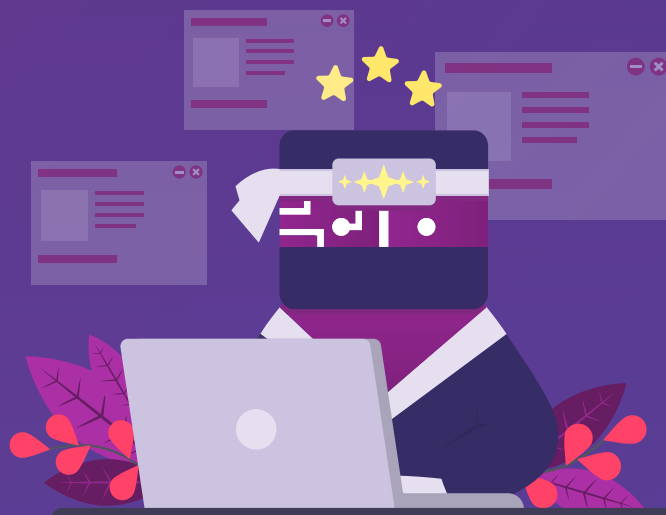
Research the options

Once you have a list of the tools and features your ideal customer service software solution needs to have, it's time to dive into the rabbit hole.

Consider everything from **user reviews and recommendations, to comparisons.** You can even take a look to see **which platforms your competitors are using**. Once you've narrowed down the options, it's time to...
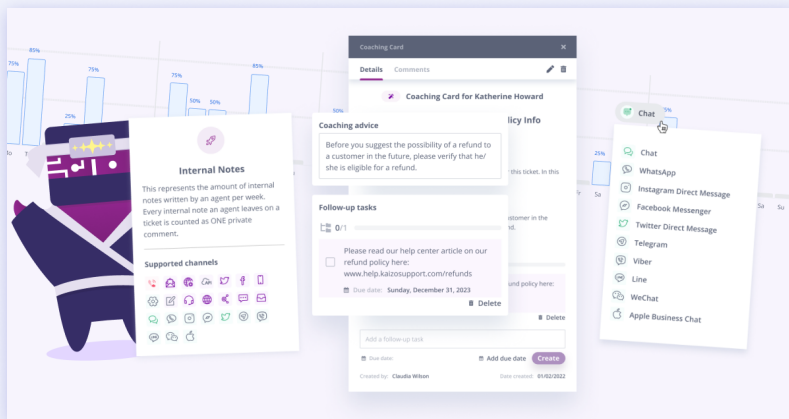
Take advantage of demos and trials

All platforms will either provide you with a demo, a free trial or both. So with your list of top candidates — it's time to go directly to the source.

We may be biased, but why not start now?

And why not start with Kaizo?

About Kaizo

Kaizo

Kaizo offers its users a multi-functional software that leverages game theory to balance workforce engagement, management, and agent skill-building. And it's fully integrated into Zendesk!

This tool quickly turns performance intelligence into impactful coaching to set each team member up for success. Powered by AI, gamification, and an advanced QA solution — with Kaizo, users receive an actionable overview of team data and immediate opportunities to use it.

Kaizo automates the collection and analysis of team performance and creates Alerts to indicate when an agent, team, or the entire customer service department reaches (or falls below) a quality threshold. With this feature, Kaizo allows managers to take immediate corrective action when it really matters; Thus, creating value for the agent and the company at the same time.

This platform is for business with the following goals:

1. Achieving personalizable, data-driven Quality Assurance
2. Establishing a link between excellent customer service and support agent motivation
3. Leveraging sophisticated metrics with automated data analytics

Kaizo

Want to see your customer service teams **go from good to great** in a matter of weeks?

Try for free