Choosing Help Desk Software To Deliver Exceptional Customer Service

BEST PRACTICES AND 10 HIGHLY SOUGHT FEATURES

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In this guide...

INTRODUCTION

Software to support your team and customers

This guide explores top software features to consider when exploring the best solutions to boost your support team's success. The most sought-after software features include:

- Automation workflow functionality
- Configuration options
- Scalability
- Deployment options, attentive implementation & onboarding
- API integrations
- Security
- Usability and device accessibility
- Knowledge base
- Advanced live reporting
- Omnichannel submission

Choosing software raises important questions: *Is this software company partnering with my business for the long haul? How can I be sure I'm getting the right solution to handle my service desk's ticket load?*

You can read up here on how Issuetrak's team supports you when you choose to partner with us. But if you're still searching, read on for our breakdown of what to expect from solid and reliable help desk software.

CHAPTER I

Help Desk Software & Customer Service

What is help desk software for customer service management?

Who do you rely on to design, build, deliver and operate your issue ticketing services?

Help desk software helps you manage tickets at your support desk by tracking your users' urgent requests and assigning the most qualified employees to solve them. Categorizing, prioritizing, and assigning ticketed issues are mainstay functions for any customer service management tool.

Other capabilities like round-robin assignment, task management, canned responses, webforms, and asset tracking should also be on your shortlist when choosing software. If the basics of ticket tracking are covered, the rest should fall into place.

First Things First: Customer Service Levels

If receiving good support from your vendor is a make-it-or-break-it factor for your company, seek a SaaS solution known for delivering fast and stellar service. You'll want to steer clear of ones who, despite excelling in some spheres, get knocked once or twice for lackluster customer service standards.

SolarWinds' or Zendesk's scalability suits large companies, but reviews show that they won't knock your socks off with customer service. Meanwhile, HappyFox will greet you at the door with cookies—but only for the price of executive membership. Not to mention the long message threads and eternal wait time of Spiceworks' support system limited only to email and forum (the zero-human contact notwithstanding).

> 66 ——
>
> *"One thing is the irony that [Zendesk is] a Customer Service suite, yet they have poor customer service."*

3-star review, G2, SMB Customer Care Manager

Not many help desk solutions provide you a dedicated account manager from the first discovery call to beyond product implementation. (Well, Issuetrak does.)

Finding the right vendor comes down to asking the right questions. You'll quickly whittle down a reliable list of the SaaS provider who's in it with you for the journey, versus those who just say so.

Useful Questions to Ask When Vetting Help Desk Software

1. While you're going through software demos, take advantage of the facetime to directly ask: what is support like? Each vendor will naturally tout themselves as the G.O.A.T.—but ask anyway.
2. Alternatively, call their support line and take notes:
   - Do they answer quickly?
   - For how long are you on hold?
   - How long does an email response take?
   - Would a purchase include a nice bucket of managed service hours to help you set up and troubleshoot along the way?
3. Find social proof. Browse social media profiles and software review websites like Capterra and SoftwareAdvice for a good tip-off of a SaaS's true service potential and insight to their rankings and testimonials.

Read more: Features that make for good customer service software.

We make it no secret to showcase Issuetrak's 98% satisfaction score, <20 second response time, and 99% recommendation rate, not just to show off, but to present the values we truly offer consumers.

If you prefer insourcing, seek a more homegrown company. Insourcing offers the best of everything, from wide availability to prompt, precise, quality support for requests. It also guarantees better control over a SaaS company's decision-making process and better scope to offer you solutions faster. Issuetrak prides itself on a 100% US-based support team, so you'll recognize and rely on the team member you're talking to every single time.
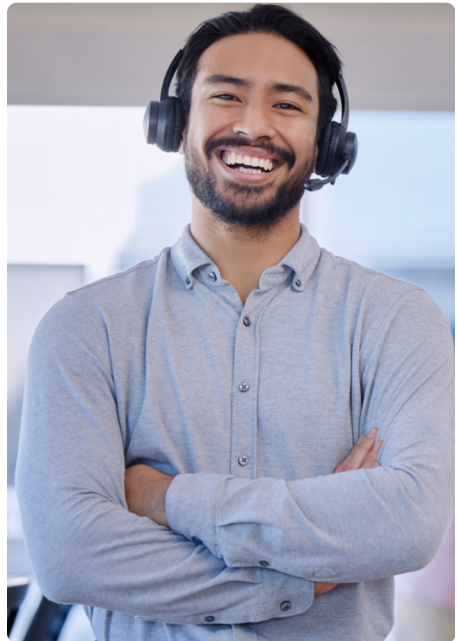
CHAPTER II

10 Staple Features to Look Out For

Automation Workflows

Business automation workflows create triggers to complete steps towards resolving a ticket. Not all help desk software vendors offer the same level of customization, so it's important to consider whether or not a vendor allows for configurable workflows with triggers you can define.
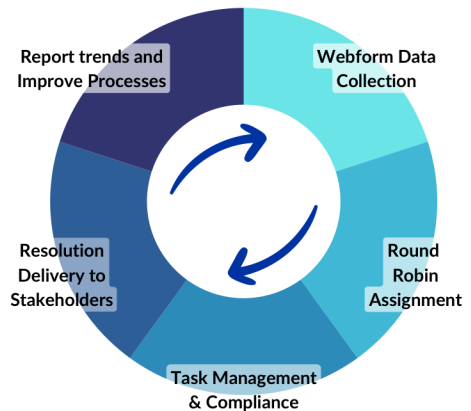
Software has changed the face of support with speed and effectiveness. By enrolling employees to troubleshoot at different stages of the workflow resolution chain, you cut back on time spent performing manual labor. You save money in the long run and delete any tedious, repetitive, time-consuming jobs.

Configurability

It's important to collect customer data in a language both branded to your business and using terms and fillable fields that collect the exact information you need to solve user problems swiftly.

Having the power to customize webforms, surveys, user-defined information fields, and more allows you to capture whatever data you need to resolve tickets in mass volume — all without sacrificing quality of service.

Report trends and Improve Processes

Webform Data Collection

Round Robin Assignment

Task Management & Compliance

Resolution Delivery to Stakeholders

Configuration options in help desk software put you on a faster track to resolving issues even before they're in the door. It also ensures you're speaking directly to your customer. Issuetrak offers plenty of customization options, including:

- Webforms
- Surveys
- User-defined fields
- Substatus rules
- Workflow automation triggers
- Dashboard views
- Individualized reporting
- Appearance and white labeling
- Worker usability like dark mode

Many vendors claim to be highly configurable, but beware of options that offer customization at a bewildering price. Also be aware that many software options parse out their product into multiple offerings, further driving the price.

Omnichannel Submission

Omnichannel submission allows you to create tickets from multiple sources, ensuring you reach customers where they already are, and that all of your notes and updates are accessible from one central location.

This improves customer service expectations and your overall user experience, contributing to better business growth, ROI profitability, and practices. Omnichannel submission is increasingly popular and extremely labor-saving for help desk teams trying to prioritize requests.
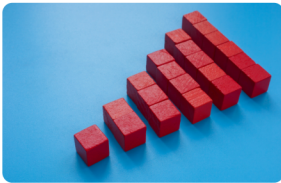
Scalable Solutions: Size and Price Matter

For Small to Medium Businesses

Spiceworks is a great free tool with competitive features and HelpSpot offers wallet-conscious rates. If you're a business looking to grow, however, you'll want to consider a more scalable option beyond the basics.

Many SaaS providers follow a "one-size fits most" approach, so for small and medium businesses seeking a scalable solution, Issuetrak, SysAid, or Freshdesk might be worth a deeper dive.

Big-name software solutions like Jira or Zendesk offer perhaps too much complexity for the needs of a smaller or even medium business, as we've heard from customers who have moved to Issuetrak:

> " *"I looked at other systems and they didn't have the capabilities we wanted, or I wasn't comfortable implementing them with our network or using them with day-to-day operations."*
>
> Technical Services Manager at Neptune Equipment

In your shopping journey, check if these features are offered at non-premium prices:

- Configuration options
- Onboarding
- Unlimited Users
- Unlimited Tickets
- Advanced Reporting
- Account Manager
- Unlimited Storage
- Multi Knowledge Base
- Integrations

SolarWinds offers onboarding only at the Enterprise level, while HappyFox limits the number of tickets per tier that your organization can create. At the lower rung, this risks leaving you SOL when a more urgent problem hits.

Overall, compare pricing charts before making a final decision to know what is and isn't included in your pricing tier.

> Issuetrak puts small businesses on a fast-track trajectory for growth.
> Explore More: Issuetrak for Small and Medium Businesses

For Large Enterprises

A free tool may be a better match for startups—but an enterprise? You're going to need something more robust. Larger scale corporations might opt for heavy hitters like Zendesk and ServiceNow.

These companies may offer diverse software services, but their products often come at steep price points. For instance, where many vendors offer round robin and task manager as part of the package deal, Zendesk gates these basic necessities as for-sale integrations. With certain other companies, on-demand features and helpful resources are available, but only at a premium price, as seen with LiveAgent.

Although comprehensive, partnering with big-name vendors could incur needless added fees to your total.

Seek out perks like unlimited end users, no agent minimums, unlimited tickets, and/or an advanced task manager, as offered by Issuetrak.

Deployment, Implementation, and Onboarding

While on-premises deployment is here to stay at Issuetrak, that's not the case for every software vendor.

There are those like Freshdesk who are likely highly specialized in cloud hosting because they limit their service strictly to cloud. Both Spiceworks and Jira phased out their on-premises offering to maximize their cloud-hosted option—leaving many data-sensitive industries out in the cold. Who's left to offer on-premises services?

Especially in industries like government, healthcare, or other institutions with stringent security protocols or compliance requirements, options for on-premises hosting are increasingly limited.

Luckily, you don't have to limit yourself. Partnering with Issuetrak, SolarWinds, or SysAid, you can keep your on-premises hosting option. Those who continue to offer on-premises hosting provide excellent capabilities that will endure, no matter what digital takeover they face.

When considering your software options, it's also important to ask how simple the implementation and onboarding process is. Is there a sufficient self-service knowledge base for fast learning? Will you have the option to play in a sandbox environment with a free trial?

Check that your chosen vendor offers white-gloved implementation and a fully-staffed Account Management team:

- Account Manager
- Professional Services implementation
- A success manager from the first call
- Guidance during the setup process
- Ongoing support for changes

Overall, while SaaS providers like Freshdesk, Jira, Spiceworks find value in deleting on-premises and specializing in cloud-only environments, Issuetrak values your right to choose.

Furthermore, Issuetrak provides dedicated account management from the first call, with ongoing support and a full, personal implementation team to curate the system for your help desk needs. (Your joint participation in the setup process makes it easy to learn the software, too.)

This white-gloved service is not available with all providers. If it is provided, it is likely going to cost you a premium fee. Weigh the costs to benefits when considering your need for ease in deployment, implementation and onboarding.

API Integrations

Most modern SaaS providers should offer updated API integration capabilities. But just in case, be aware in your shopping journey of outdated APIs requiring copy-paste coding. If you aren't code-savvy and you rely on a third-party web developer for your site, you likely don't have a coder on hand to develop extensions, plug-ins, and apps.

Many help desk software options, like our API v2's Graphical User Interface (GUI), cut out the need to have an on-hand developer. GUI pushes and pulls data between separate database systems for you, no coder necessary.

Issuetrak's Zapier integration links communications between thousands of communication apps with the click of a button. Our integrative API using Zapier is code-free, making it easy to set up "if-then" actions between your site and other web applications.

Security Blockers, or Blockers to Security?

Take note of whether MFA or other anti-breach measures are included in your subscription! All SaaS companies maintain security–but some handle an outbreak better than others.

Cyber hackers are a serious issue - no one is exempt.
- One phishing email targeting 21,000 users bypassed Microsoft Exchange's email security.
- Mix-ups with scripts and data back ups could happen to anyone, as with one Jira engineer.
- It also happened when hackers penetrated Fortune 500 companies in a breach that went undetected for months.

Look out for software providers who make the grade for SOC Types I and II Compliance. When you get on a demo call, be sure to have the rep specify the security protocols in place to safeguard your sensitive data.

Usability and Accessibility Across Devices

The future is mobile, and interacting with your ticketing system is accessible from wherever your phone is—or so they say.

Spiceworks' former app design offered toggle settings for push notifications on ticket status. Sadly, its unreliable ticket creation landed its mobile usability at 3 out of 5 stars—the possible cause of Spiceworks' mobile help desk app deprecation in 2020. Likewise, Freshdesk users also complain heavily of glitches in the app version. Case in point: mobile apps help you easily access help desk ticketing, but the functionality is not necessarily ready for help desk complexity.

Issuetrak offers an efficient ticketing system to eliminate extra steps, extra costs, and extra platform hopping. While we do not as yet tread the wary path of dysfunctional apps, Issuetrak's responsive browser-based application is accessible from any internet-enabled device, enabling users with Windows, Mac, Android, iPhone, Chromebook, etc.

Meet customers where they are.
- Windows
- Mac
- Chromebook
- iPhone
- Android

Knowledge Base and Self-Service

Self-service is on the rise, which ultimately saves time for support teams usually inundated by ticket volume.

Knowledge bases are an integral part of customer self-service, as visitors can use the resources to get the information they need on their own at any time. A good knowledge base is like having a stronghold, and will support multiple formats of learning, including solution articles or FAQs, product manuals, tutorials, videos, and troubleshooting guides, all categorized into distinct themes or folders.

Agents can also streamline their workflows by directing customers to helpful articles or checking the knowledge base for answers to common questions. Agents can standardize procedures and responses, ensuring they provide consistent, quality service.

Read more: The Benefits of Customer Training

Knowledge Bases include:

- Solution articles
- FAQs
- Product manuals
- Tutorials
- Videos
- Troubleshooting guides

Advanced Live Reporting

Another highly-sought feature in help desk software includes live updates and custom views over tickets and tasks.

Many competing SaaS vendors offer dashboards, some more comprehensive than others. Data access for all stakeholders is a serious consideration, so be sure to factor in advanced live reporting when choosing help desk software.

Live Dashboards provide status overviews, with Dashboard views that can be curated by all, from directors, to employees, to customers. The array of views can include quarterly performance, open tickets by assignee or organization, issue type, priority, and more.

Issuetrak's Issue Hub is a prized, comprehensive feature unmatched by competitors. It gives live updates to any tickets, and the ability to filter ticket views as pertains to you. See all open issues, a summary, a parent ticket's assignee, or even a breakdown of the individual assigned tasks to drive a ticket to completion.

CONCLUSION

Just the beginning of your journey to efficiency.

Last piece of advice? Match the services provided to the services you value.

It may take some study, but the payoff is worth it to side with software built to suit your needs. While the bulk of SaaS vendors offer competitive features, you can compare them and pare down the list to find the one just for your organization.

Most of all, your chosen SaaS provider must be in it for the long run, so don't settle until you have all the features you need for customer success at your help desk.

- www.issuetrak.com
- Issuetrak for help desk
- Issuetrak for complaint management
- Issuetrak for customer service and support