



TEAM SUPPORT

B2B CUSTOMER SUPPORT SOFTWARE

Choosing the Right Help Desk Software



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There are many different help desk support options on the market today, from basic ticketing systems to robust enterprise-level solutions that provide tons of functionality. Finding the right help desk software for your business can take time, but it is well worth the investment to find the right solution for your needs.

Step 1: Determine the Use Case

- Are your customers businesses (B2B) or individual consumers (B2C)?
- Do you provide internal support to employees, or external support to customers?
- Do you want to provide self-service options?
- Do you prefer [hosted/cloud/SaaS software](#) or installed, on-premise software?

Step 2: Clarify the Scope

- Consider volume of tickets
- # of users (ie: support agents)
- Do you expect your help desk needs to grow in the future?
- Does it need to integrate with other business systems?
- Plan for setup and training time and cost
- Do you need to track products, versions, or inventory?

Step 3: Must-have VS Nice-to-Have Features

- Make a list of desired features, then prioritize them (we've included one next)
- Be realistic: some features are absolutely necessary, while others may be desirable but not really necessary
- Plan for the future: if you are growing rapidly you'll want a system that can scale
- Consider your industry: a consumer electronics call center has very different needs than a five person software support team

Step 4: Compare Options

- Check out software comparison sites. Some of our favorites include:
 - Capterra
 - G2 Crowd
 - Software Advice
 - GetApp
- Read real user reviews
- Talk to industry colleagues and ask for recommendations
- Look at the various features and options available
- Create a Shortlist of your top 3-5 choices based on features and ratings

Step 5: The Shortlist

- Look at each of your shortlisted vendor's websites
- Research the company and the software
- Watch product videos
- Read testimonials and case studies
- Get a personalized demo. This will allow you to ask questions and understand how the system will work with your business processes.
- Rank each software on your shortlist based on the must-have and nice-to-have features you outlined in Step 3
- Check their support ratings - remember that as a help desk software vendor, their own customer support should be spectacular. If they can't provide great support themselves, how good will their software be at helping improve yours?

Bonus Step - Sign Up For A Free Trial (And Use It!)

- Most software now offers a free trial option for you to test the software yourself
- Try it out just like you would if you were already using it. Add users, create tickets, set up a customer portal, etc.
- Contact the support team and ask questions, see how responsive they are and if this is a company you can see yourself doing business with for a long time
- Test your "must have" features. Do they work as well as expected?
- Look at the reporting options - can you get the information you need in order to manage your help desk?

What Features Do You Need?

Ticket Management

- Email-to-ticket
- Ticket Automation
- Ticket Collision Prevention
- Related (Parent/Child) Tickets
- Private or Public Actions
- Suggested Solutions
- Customizable:Fields
 - Statuses
 - Ticket Types
 - Conditional Custom Fields
 - Workflows
 - Actions
 - Severity
 - Ticket Page
 - Ticket Views
- Omnichannel Support:
 - Phone
 - Email
 - Live Chat
 - Social Media

Customer Management

- Customer and Contacts Database
- Related Companies (Parent/Child Relationships)
- Multi-Brand Product Lines
- Customer Notes and Alerts
- Customer Distress Index
- SLAs (Service Level Agreements)

Collaboration

- User Groups & Ticket Queues
- Knowledge Base/Wiki
- Internal Chat
- Shared Calendar
- Task Management

Customer Self-Service

- Customizable Customer Portal
- Ticket Deflection
- External Knowledge Base
- Single Sign On (SSO)

Visual Support Tools

- Video Recording
- Screen Recording
- In-line Images
- File Attachments

Integrations

- CRM (ex: Salesforce, HubSpot)
- Developer Tools (ex: Jira)
- Marketing (ex: MailChimp)
- API to Integrate with Internal System

Other Features

- Agent Ratings
- Task Management
- Custom Reports & Dashboards
- Product & Inventory Tracking
- Mobile Access



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Looking for Help Desk Software?

TeamSupport is helpdesk software built for business to business customer support.

Our software is specifically designed to meet the needs of software and technology businesses, and helps to reduce support costs while increasing customer satisfaction. If you'd like to learn more, click the link below to visit our website:

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