Choose wisely:
A Zendesk cheat sheet for picking your support solution

Choosing a support software vendor can be hard. But it's a lot easier when you have an insider's perspective. We're pretty familiar with the customer support industry, so we've put together a helpful list of questions to ask when evaluating potential vendors—about everything from self-service to security. Use this list to break the ice with your vendor and make sure there are no surprises for your team.

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💬 Customer experience

- Will the vendor offer multiple communication channels for your customers to reach support (e.g., phone, email, chat, and social media)?

- Will the vendor offer customers a way to check the status of their support requests?

- Will the vendor provide customers with access to self-service content?

- Will the vendor provide customers with a way to rate the relevance of your self-service support content?

- Will the vendor provide you with the ability to send a satisfaction survey to customers after their support interaction?

⚙ Admin configurations

- Will the vendor provide multiple levels of workflow process configuration (e.g., business rules based on ticket status, change to ticket field, tags, time ticket has been opened, etc.)?

- Will the vendor provide admins with a way to create routing rules based on various data (e.g., user info, ticket data, channel)?

- Will admins have control over how to organise ticket views?

- Will admins have the ability to configure role-based views?

- Will admins be able to customise the user interface to reflect the look and feel of your organisation's brand?

📅 Admin management

- Will admins have the ability to add, edit, and monitor channels (e.g., new Facebook account, international phone support in various countries)?

- Will admins be able to view, edit, and/or manage users and organisations?

- Will admins be able to view, edit, and/or manage pre-defined responses, workflows, SLAs, escalation rules, and other automations?

- Will admins be able to manage language preferences?

- Will admins have internal controls to maintain views, access, and permissions?

💲 Cost & value

- Will your organisation have a low-effort experience when implementing the support tool?

- Will the vendor take care of service engagements, or will your team have to contract with an outsourced third party?

- Will the implementation costs be more affordable than other vendor implementation costs?

- Will the support tool provide a way for admin to easily onboard and train agents?

- Will your team be able to build customisations and workflows without the help of an outside partner?

🔧 Useful support tools

- Will the vendor allow agents to receive incoming tickets from different channels (e.g., phone, email, chat, social media)?

- Will agents be able to bulk-manage tickets?

- Will agents have the ability to prioritise tickets based on SLAs or other important customer data?

- Will agents have access to an agent knowledge base?

- Will agents be able to respond to customers with pre-defined responses but also easily customise those responses?

- Will the vendor provide agents with the ability to respond to customers with pre-defined responses?

- Will the vendor provide a way for agents to customise pre-defined responses?

- Will agents be able to turn a useful ticket into a knowledge base article?

- Will agents be able to tag and categorise a ticket with important keywords?

- Will the vendor provide a way for agents to see the support content a customer has already viewed prior to the support interaction?

- Will the vendor provide automatically generated transcripts of customer conversations via the phone?

- Will the vendor provide a support tool system that suggests helpful articles to agents?

⚏ Management tools

- Will managers have access to agent metrics in order to evaluate agent efficiency?

- Will managers be provided with a dashboard that tracks agent contribution (e.g., tickets solved, knowledge base contributions)?

🖥 Agent interface

- Does the vendor provide an agent interface that makes it clear where agents should view tickets and get started?

- Will your organisation be able to organise tickets in a way that is most helpful for agent productivity?

- Will the vendor provide agents with visibility into their support performances?

- Will the vendor provide agents with visibility into the overall team's support performance?

- Will the vendor allow agents to multi-task, such as engaging with a customer, viewing multiple tickets, and viewing customer information within the same interface?

- Will agents be able to use the support tool on their mobile devices?

- Will agents have the ability to escalate tickets to a manager or supervisor?

- Will agents be able to update ticket statuses and fields?

🛡 Security & compliance

- Will the support tool offer data encryption at rest?

- Will the support tool offer enhanced disaster recovery?

- Will the support tool be HIPAA compliant?

- Will the support tool be SOC 2 & ISO certified?

Collaboration capabilities

- Will the product allow for tracking tickets across groups of agents?

- Will the product allow for tickets to be sent to a different agent or team for collaboration and/or escalation purposes?

- Will agents have the ability to respond internally with private comments?

- Will internal and external responses be visible in a single view so there's a complete view of all updates in one ticket?

- Will agents be able to share tickets with another user (e.g., partner vendors)?

Reporting & analytics

- Will the vendor provide pre-built reports analysing support metrics (e.g., response times, resolution times, customer satisfaction, self-service, and one-touch resolution)?

- Will the vendor provide a way to see what terms customers are searching for in the forums?

- Will your organisation be able to compare your support performance with other similar companies and benchmarks?

- Will the vendor allow data to be easily exported (e.g., XLS, CSV)?

Integrations

- Will the support tool integrate with core systems and other business applications that your organisation uses?

- Will the support tool have the ability to configure to your brand's look and feel?

- Will the support tool have flexible APIs that are open and publicly documented?

- Will the support tool offer the ability to build your own apps and integration, using any client-side or server-side technology?

- Will the support tool have a developer community to help with apps or integrations?

Vendor support & partnerships

- Will the vendor onboard your team with the proper structure, training, and resources?

- Will the vendor provide your team with ongoing support at the level that you need, including providing a dedicated account manager for your organisation and support team?

- Will the vendor offer regular training sessions led by product experts?

- Will your team have the opportunity to contribute to the product road-map of the support tool by submitting ideas to the vendor?

Evaluating customer support software solutions can be overwhelming.

Let's schedule some time to review this list together. Visit zendesk.co.uk/demo to get started.

Looking for more advice? Here's what the experts say:

1. Gartner recommends that you identify at least one vendor who can meet your organisation's needs, and preferably at least one viable alternative to keep the process competitive.

2. Not all vendors will be able to meet your demand. Make sure every vendor you consider can answer affirmatively to the questions most important to your organisation.

3. Check out "Gartner's Magic Quadrant Report" to see how Gartner analysts compare Zendesk to other technologies.