

Selecting Customer Support Software

A Workbook for CPG Organizations

Are you a CPG organization looking for the right customer support software to meet your unique needs? Selecting the right vendor can be a daunting task, but with the right strategy, it doesn't have to be. That's why we've put together this strategy book to help guide you through the selection process. We've compiled a list of essential questions to ask when evaluating potential vendors, covering everything from functionality to support. With this guide, you can ensure that you find a vendor who can meet your specific needs and help provide the best possible support for your customers.

Phase 1: Understanding Your Software Needs

The first phase of the software selection process is all about understanding your software needs. It is essential to take stock of what your current system is doing or not doing and identify the biggest pain points. Once you have a clear understanding of your current software's deficits, you can start to make a list of goals for the new software. This includes identifying what business processes you want to improve, what processes you want to automate, and what resources you want to integrate into the new system. It is also important to consider your budget and break down the implementation into phases to help with costs.

- 1. Do you need a full reboot, or can you do an upgrade?** Take stock into what your current system is doing or not doing. If a few targeted add-ons can get you where you need to go, then you may not need a full reboot. Check in with what's available with your current system first.
- 2. How is your current software failing you?** What are the biggest pain points in your current software? Ask your users this question too, don't just assume. Users and managers may have different answers.
- 3. What are your goals for the new software?** Once you identify where your current system is lagging, you can start to build what you want your new system to do.
- 4. What business processes do you want to improve?** What processes do you have that you want to automate?
- 5. What resources do you want to integrate into the new system?** Are you planning to integrate data? For instance, do you want CRM and ERP data to connect?
- 6. What's your budget?** Breakdown implementation into phases to help with costs.

Phase 2: Selecting your Software

After you've identified your software needs in Phase 1, you can move on to the second phase, which is all about selecting the right software solution for your business. In this phase, you need to ask the right questions to ensure that the vendor's software will meet your specific needs. This includes questions about communication channels, fraud detection, agent interface, automatic ticket routing, pre-defined responses, and compliance. Once you've selected your software vendor, you can move on to the next phase, knowing that the vendor's software solution will meet your needs.

- 1. Will the vendor offer multiple communication channels for your customers to reach support (e.g., phone, email, chat, and social media)?**
- 2. Does the vendor offer functionalities to detect potential fraud among consumers trying to take advantage of your concession policies?**
- 3. Does the vendor offer an agent interface that's appealing enough to make your agents excited about the change to the new solution?**
- 4. Does the vendor offer functionalities to automatically route tickets to certain teams based on keywords?**
- 5. Will the vendor provide a way for agents to customize pre-defined responses?**
- 6. Will the support tool and all of its add-ons be SOC 2 & HIPAA compliant?**
- 7. Will the support tool help you identify critical products in your portfolio and manage recalls if necessary?**

Phase 3: Validating your Software

The third phase of the software selection process is all about validating your software. This is where you document your use cases and testing scenarios and present them to your software vendor. You'll work with your vendor to refine your documentation and build a proof of concept. This will allow you to validate your assumptions and ensure that the software meets your specific needs. It's essential to focus on your most important needs defined in Phase 1, and document your use cases meticulously, defining what outcomes need to be achieved for successful implementation. By doing this, you can set clear expectations with your implementation partner and draft a testing plan for the later stages of the project. This phase is critical for ensuring that your software solution is validated and meets your business requirements before moving on to the implementation stage.

- 1. Focusing on your most important needs defined in Phase 1, document your use cases meticulously and define what outcomes need to be achieved to consider its implementations successful. A commonly used format here could be user stories, following the structure of “As a [role], I want to [action], so that [desired outcome] “.**
- 2. Based on the use cases and outcomes identified, document step-by-step how you plan to test if the outcome has been achieved or not. Those steps help you set clear expectations with your implementation partner, as well as drafting a first testing plan for the later stages of the project.**
- 3. Present your use cases and testing scenarios to your software vendor or implementation partner and review them together. Use the feedback to refine your documentation where necessary.**
- 4. For any custom functionality, request a visual preview from the vendor or implementation partner.**
- 5. Start your implementation by building a proof of concept together with your vendor or implementation partner, so you can get your hands on the solution and validate your assumptions.**

Our recommendation for CPG support software: Zendesk & Flare

In more than 10 years accompanying CPG companies in their software selection, implementation and maintenance, we've learned that there's no one size fits all solution. Thus, the phases above provide you with a guideline on how to find the support software that fits YOUR organization.

To organizations looking for a sleek, efficient solution with the right mix of out-of-the-box functionalities and customizability, combining Zendesk with Flare CPG offers a well-rounded package. As one of the leading ticketing solutions, Zendesk provides accessible UI and pricing, multi-channel support, automated ticket routing, and effective ticket deflection strategies.

Flare CPG enhances Zendesk with industry-specific features that allow the integration and visualization of your external systems directly in the ticket view. Some of the largest players in the consumer space rely on Flare to manage their physical communications, issue recalls, manage reimbursements, and identify fraud from within Zendesk, all while staying SOC2 and HIPAA compliant.

We're here to help!

Evaluating customer support software solutions can be a daunting task, but you don't have to do it alone. At Faye, we're here to help simplify the process and guide you toward the best solution for your business needs.

Let's work together to review your options and find the right fit. Visit <https://fayedigital.com/contact/> to get started and schedule a consultation with our team. We look forward to helping you enhance your customer support process and improve overall satisfaction.

