

The power of good customer service management software

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The most important thing about your business is your customers. Customer service software allows you to support and strengthen customer relationships. Customer service management software (CSM) is the foundation upon which a [great customer experience](#) is built. But how do you know which customer service solution to use? Here are some insights.

First, what is customer service software?

A call comes in. Your client is unhappy. Your junior receptionist jots down their name and number on a piece of paper. The phones are busy so she takes five other calls, then goes to get coffee, answers her emails, scrolls through her phone's feed, and then remembers the paper. Which the cleaning staff have thrown away when tidying up. The call is lost. Just like your customer.

Customer service management software allows you to keep track of customer queries, requests, communications, and problems. It brings all customer conversations and information into one unified system.



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For example, an IT helpdesk that fields internal computer and software queries from staff. A call comes in, and a ticket is opened. The staff member's details are already in the database, so populating the fields is free from error and quick to do. A technician is assigned to the ticket, the call is ended, and both the member of staff and the technician receive a notification with the service ticket number. All follow-ups, escalations, resources and resolutions thereafter are then added to the ticket. Every time that staff member calls in the future will provide their full history of previous problems and solutions at the call centre's fingertips, allowing them to respond quicker and more efficiently.

Personalised care, at the touch of a button.

Why customer service tools are very important

With a customer service manager, you can manage the resources, products, and services that your business offers, such as field service, contracting, job cost management, preventative maintenance, property management, vehicle services, equipment servicing, or customer support.

It helps you save time, reduce expenses, track profitability, increase productivity, and most importantly, improve customer satisfaction. Businesses of all sizes and types can benefit from customer service platforms - from multinational enterprises supporting millions of other companies in multiple languages to small consumer businesses that need to respond to customer inquiries quickly without hiring an army of support personnel.

Here are some key benefits of customer service manager solutions

1. **Improved customer satisfaction and loyalty.** Service agents who have the data and tools they need to provide fast, personalised responses to customers, deliver better service. Happy customers mean loyal customers, which means less spend required on marketing to gain new customers, and improved brand equity.
2. **Unleashed self-service.** The historical data acquired on your customer service platform allows you to expedite and

streamline knowledge base creation and management, which saves agents time and provides customers with the resources they need to enjoy your product or service.

3. **Empowered service agents.** Customer service software helps agents access the customer information they need, when and where they need it, improving collaboration, and saving time and resources.

4. **Supported scalability.** Businesses reach a point where spreadsheets and manual data capture are not sufficient for personalised, transparent customer service communications. Customer service management software gives a business customer-centric agility.

5. **Enabled smaller teams to do more, faster.** The power of a quick 'first reply' is one of the most significant influencers on customer satisfaction. Businesses can still perform well with fewer agents by using customer service software that equips each agent to do more.

Customer service software is good for business

For SMEs

By automating all routine tasks, a good customer service tracking software will ensure your focus remains on responding to customers.

- A good customer service software solution will allow you to categorise, prioritise and assign tickets as well as keep track of any updates and comments received and responded to.
- Customer service software that is integrated with your ERP gives agents better context than supporting via email alone. Customer interaction history, purchase history and other critical information will give your support agents all they need efficiently and accurately respond to customers.
- Service ticketing applications can set SLA policies and help your agents honour deadlines. Escalation to senior support managers is also possible if they are unable to solve the problem on time, or if the customer requires more senior attention.
- Good customer service management solutions ensure multiple agents are not working on the same problem at the same time, and that the customer is not receiving varying responses.

For corporates and enterprises

The ideal customer service solution for enterprise businesses is one that allows for customer support at scale without compromising on personalisation. It also needs to encourage collaboration across various departments.

- A customer support platform will intelligently manage available agents across time zones, locations, shifts, and languages to ensure tickets reach the right agents at the right time for the fastest response.
- Ideally it will be seamless with your other back office applications, billing tools, payment solutions, and other internal and third-party tools.
- Good customer service means your support agents need the latest information on your products, sales and service history. Your enterprise customer service solution should enhance collaboration across all departments, so that the request can be resolved quickly and efficiently.

Why CSM needs ERP

An ERP system is an application that unifies business data to give key stakeholders the integrated information they need to do their job better.

However, not all ERP systems come with customer service management (CSM) capabilities. While integration to 3rd party software is often supported, many solutions need to be added on at an additional cost per module.

[BOS ERP](#) offers in-built, integrated CSM functionality that gives your support agents the power they need to deliver

exceptional, personalised customer service. With inbuilt ticketing capabilities, communication tracking, reporting, customisation and project management, BOS ERP brings your entire business's back office and front office data into one system.

When do you need customer service software?

Good customer service management software is as good as having another employee on your team. You can do so much more, at a faster rate, and a better quality output.

The moment your client base grows to a point where you can't keep up - or worse, you're making costly mistakes - it's time to bring in software assistance.

Different types of customer service solutions

A customer can be internal as well as external. Your internal call centres are as important as your inbound sales and support call centres. There are many channels through which customers can reach your support agents.

- **Live chat.** Live chat software gives agents the ability to solve customer issues in real-time online - typically from the website. This is great for sales support and queries. Chatbots are also a great way to make use of your knowledge base to answer frequently asked questions until a human agent is available.
- **Phone support.** Speaking directly to a person on the phone is a highly effective way to solve a customer's problem, especially for high-stakes issues. The tone of voice, personal touch, and highly sought-after people skills mean call centre agents can be invaluable assets to a company. Specialised call centre software for massive call centres are highly functional, recording calls for quality purposes, automatically opening tickets and more. Smaller customer support teams can use customer service management solutions that meet their needs.
- **Email.** Email is the backbone of customer support - be it external or internal customer service. Human Resources, Payroll, or IT teams can use customer service manager software when answering emails to full-and part-time employees.
- **Knowledge base.** Support teams can empower customers to self-serve by offering a knowledge base, community forum, or customer portal. Most customers prefer to try to figure out an issue on their own. Customer service software can provide insights into common queries, upon which the knowledge base can be updated to better free up agents' time.
- **Video chat.** Apps like Zoom and Google Meet are par for the course now, thanks to Covid, and enable customer service agents to directly communicate with their customers. Features such as screen-sharing and co-browsing make customer issues clearer and give service reps more freedom to solve technical issues remotely.
- **Mobile messaging.** Most mobile messaging customer support is used for tracking products, activating products, and scheduling appointments.

What to look out for in a customer service management solution

When considering investment in a CSM solution, there are several core elements that need to be present.

Ideally, the CSM should speak to your existing ERP or business systems so that your support agents can get clarity and context to your customers' queries.

The most seamless solution is to find a CSM application that is already part of an ERP system. ERP solutions like BOS ERP integrate back office and front of house transactions and data into one, unified system.

These core features are essential to an effective platform.

1. **Ticketing.** The most critical feature of a customer service manager solution is an organised ticketing system. The customer service team can use ticketing systems to organise questions, complaints, and conversations into individual

"tickets" that can then be assigned and handled. Severity and categorisation are imperative features to ensure prioritisation and call assignment are accurate.

2. **Communication tracking.** This functionality allows conversations between various departments involved in the ticket to be stored and tracked on the same ticket. Features can also include:

- Internal notes
- Response assignments
- Status monitoring
- Due-dates
- Escalation paths
- Stored policies and procedures

3. **Shared project management functionality.** Team members can collaborate and track projects with the help of project management capabilities. This ensures everyone is aware of the tasks and status at all times and eliminates double-responses.

4. **Customer tracking and reporting.** Your CSM solution should send daily updates to your customers as well as to managers on open, past-due, and updated tickets. you can analyse customer history, behaviours, and service metrics. This reporting is essential if you hope to measure efficacy and productivity as it gives clarity on how many tickets are opened, when those tickets are managed, and how satisfied the customer was with the experience. Ideally you'd like to see this in a graph and automated report.

5. **Customisation.** Enterprise support software allows for customisation of your helpdesk to make it a continuation of your brand and make their support experience seamless. Some free customer management apps allow for configuration, however customisation is usually a paid-for feature well worth investing in.

6. **Integration.** Ideally you want your CSM solution to be part of your [business software or ERP system](#). If that is not the case, it should at the very least be able to integrate with your existing business software. This will allow you to view all customer and asset-related information on one screen to expedite service.

Conclusion

If your support team is drowning in queries, frustrated by slow, outdated systems, and delayed by the drudge work of manual admin, it is time to upgrade your business software.

An integrated CSM and ERP solution is the way forward to ensure your teams have the tools they need to make your customers happy, protect your brand, and to give yourself a fighting chance in a highly competitive landscape.

Teams across the world rely on [QuickEasy BOS](#) - not only to support their processes and give them freedom to do more, with less - but for service management, ticketing, and reporting. Cloud-based, scaleable, highly flexible, and affordable, BOS ERP provides CSM capabilities in an easy-to-use platform that makes customer service manageable, and the delivery of outstanding customer experience achievable.

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