

Elion

Buyer Review Transcript

Product Reviewed	Freshdesk
Reviewer Tech Stack	Freshsales
Other Products Considered	HubSpot, Zendesk, Groove
Date	August 30, 2023
Expert Role	COO
Organization Type	Behavioral Health Startup
Payment Model	SaaS

So today, we're chatting about Freshdesk and how it's used at your company. Before we jump into that, could you give a brief overview of the company and your role there?

We're a behavioral health marketplace, where providers get new client referrals through a web profile. Providers pay a subscription fee to be listed, and careseekers can use the platform for free.

I was originally the first employee at our company, and am currently the COO.

How long have you been using Freshdesk?

About three years.

What problems were you trying to solve with Freshdesk?

We started receiving a higher number of support tickets, and using a shared Gmail account to manage them just wasn't working anymore. We needed to find a more scalable solution.

What requirements were you using to evaluate potential solutions?

I looked into Zendesk and HubSpot, as well as some ticketing platforms that were linked to knowledge bases. I believe Groove offers basic ticketing as well. But the main reason we chose Freshdesk was because it integrates with Freshsales, which we were already using for sales. We wanted to have all our customer conversations and information from the sales side seamlessly transfer to the support side.

Do you recall how the different products stacked up against one another?

I remember that I thought HubSpot was too expensive and complex for our needs at that time. I also thought that other platforms had a better user interface and would have been more enjoyable to work with all day, but using those platforms would have required toggling back and forth more frequently to access email history in Freshsales to see what we'd told the customer during the sales process and how it related to the current service issues. I believe that's ultimately why we decided to remain within the ecosystem. I remember finding Freshdesk quite affordable. It is priced per agent and costs around \$25 to \$35 per month per agent, which is significantly lower than other vendors.

How did you find the sales process with the Freshdesk team?

Yes, I remember there was a demo account with a tutorial and a video overview. It was a self-guided setup process. I don't recall having a sales call with them, but they might have offered it and I just didn't take it. I definitely had a guided tutorial on how to set up the account.

In terms of the actual onboarding and setup, what was that process like?

I found the UI of the ticketing system quite familiar because it looked similar to Freshsales. However, integrating the two systems turned out to be more challenging than I anticipated. Eventually, I had to seek assistance from one of our developers. Apart from that, I learned how to use it on my own. It took us approximately a month to go from considering the need for a ticketing system to effectively managing emails in Freshdesk.

What use cases do you use Freshdesk for?

The main goal we had was to ensure that every email was addressed by the appropriate person and that we implemented a clear logging system with the ability to assign emails to different individuals. Our shared inbox was receiving an excessive amount of notifications that were unrelated to our tasks. So we focused on prioritizing and creating automated rules to filter out certain types of tickets while ensuring that important customer inquiries were promptly addressed and assigned to the right person.

What are some of the strengths and weaknesses of Freshdesk?

I would say that designing workflows for prioritizing tickets, assigning them to the right people, categorizing them, and automatically closing or removing certain tickets from the flow has been very effective. It has been able to adapt and evolve as new people joined, responsibilities changed, and new types of emails came in. We have the flexibility to group tickets differently based on our needs.

Another strength is the availability of shortcuts for drafting templated responses. You can use slash commands and also create custom tags. This allows you to come up with new labels and

define rules for when those labels should be added. Additionally, you can set business hours and have different auto responses at different times of the day to manage expectations regarding response times.

As for weaknesses, the reporting aspect of the tool is extremely poor. It's extremely difficult to extract any meaningful metrics on the most frequently asked questions or get information about the agents and their handling of tickets. It's counterintuitive, and I wouldn't recommend it if having a clear understanding of types of questions, customer obstacles, and agent performance is important to you.

The options for grouping data are very limited. Generating the desired reports is not always possible, which is surprising considering the excellent data manipulation capabilities in Freshsales. Additionally, the tool was frustratingly slow to load due to the excessive embedded charts. It took forever to load the whole page. And the options for exporting data were also lacking. If we couldn't view it within the tool itself, we wanted to be able to download it and analyze it in Excel. Unfortunately, this wasn't possible.

Another weakness is the absence of a scheduling option for sending responses. This was particularly annoying because people would want to finish a ticket immediately but not respond to the customer right away, as it could create unrealistic expectations. Unfortunately, this feature was not available in Freshdesk, causing frustration for the users.

Overall, I think the main weakness of Freshdesk is the reporting, the inability to really analyze the data in the platform or sufficiently extract it.

How is the reliability of the platform?

Yeah, it's been really reliable. I can't recall a single instance when we couldn't log in because the platform was down. That just wasn't a thing.

How was the integration with Freshsales?

It was a little bit harder to set up than anticipated, but once you got it set up, it worked. They don't have off-the-shelf integrations, and I think that's a real drawback to the Freshsales suite. It's really a standalone option.

How did you find the account management and support?

We didn't have an account manager, so our only means of contacting their support team was through their live chat. Unfortunately, it seemed like the entire support and product team was based in India, which made communication quite frustrating. For example, if we had a question about a ticket that was marked as resolved but shouldn't have been, they would provide us with a helpdesk article about automation, which wasn't what we were asking for. Eventually, they

would escalate the issue to their product engineers and create a ticket to address the problem, and it would eventually get resolved, but the whole process was far from easy, fun, or pleasant.

Do you think you made the right decision to go with Freshdesk?

If you're using Freshsales and need a ticketing tool, it should probably be Freshdesk. Using a ticketing system is more effective than relying on a Gmail account. However, I can't wholeheartedly recommend the software. Personally, I wouldn't opt for Freshsales again, which means I wouldn't choose Freshdesk either. These two products are somewhat dependent on each other in that sense.

Who do you think is the right type of customer for Freshsales and Freshdesk?

What was good about it was that, as someone early in their career with limited experience, I was able to set up the CRM and support system on my own. From that perspective, it's pretty good. It's relatively easy to use and has a simple onboarding process. However, if you're switching from a different CRM to Freshsales, it might be more challenging.

I'm not sure if they offer a HIPAA-compliant plan, so that could be a limitation if you need to handle PHI in a healthcare company (we didn't need it to be HIPAA-compliant for our purposes).

Freshsales seems to focus on smaller companies. Their pricing is affordable, and the implementation process is straightforward. It's a good fit for small to medium businesses that have a high volume of support needs through email. They are more of a budget option or a straightforward ticketing system, so you don't get a lot of extra features.

What would you suggest as areas of growth for Freshdesk?

Definitely the reporting. There should be a straightforward dashboard where you can log in and easily see the things you expect, like response times for tickets, daily ticket comparison, and the types of questions we receive. It should be easier to access basic analytics. Additionally, their customer support could definitely use some improvement.

Do you have any advice for people who are going through this type of a decision process right now?

Yeah, if this tool is going to be used by agents all day long, it needs to have a nice appearance. It shouldn't be frustrating to use, and it should make agents feel like they are in control and aware of what's happening with their tickets. In my opinion, there are many other platforms out there that are better designed than Freshdesk.