



# Choosing The Right Customer Service Software

The Buyer's Guide

A detailed screenshot of a mobile application interface for customer service management. On the left, a vertical navigation bar features the freshworks logo at the top, followed by five dark blue square icons with white symbols: a magnifying glass, a person, a gear, a chart, and a gear. Below these is a large black button with a white circular icon. The main screen is divided into several sections: a top header with "CUSTOMER METRICS" and "ONGOING CHATS"; a large circular gauge chart showing "Customer Satisfaction" at 100%; a "Ticket Summary" section with two horizontal bar charts for "Ticket Summary" and "Resolution Rate"; a "Ticket Summary" table listing six tickets with columns for Customer ID, Subject, Status, and Last Update; and a "ONGOING CHATS" section showing a list of messages in a chat interface. A large green bar chart is positioned at the bottom right. A separate smartphone screen on the right shows a "Support Chat" interface with a message history from "Sep 28" to "Sep 29", including messages from a customer and a support agent, and a "Type a message" input field at the bottom.

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# The buyer's guide to choosing the right customer service software

Imagine a scenario where a customer sends a follow-up email after getting no reply to their last one. A second customer is stuck waiting on hold again while a third tries your live chat, only to be asked to "start over" for the fourth time that week. Meanwhile, your agents are juggling five tools, copying data between systems, and manually tagging tickets to stay afloat.

The problem usually lies in the system, not the people. Even the best teams fall behind when tools are disconnected, outdated, or not built to scale. This guide will help you fix that. It'll walk you through how to assess your current setup, what to look for in a modern support platform, and how to pick a solution that improves customer experience now and scales with your team as you grow.

PART ONE

# Status Quo



Over the past few years, customer service has evolved from a reactive support function to a core customer loyalty and brand differentiation driver. The shift is customer-led: beyond quick resolutions, customers expect consistency and convenience across every touchpoint.

But many businesses haven't caught up. They're still using fragmented systems, legacy helpdesks, or tools built for ticketing rather than conversation. The result? Rising frustration on both sides of the support equation—customers who feel unseen and agents who feel stuck.

To understand how we got here and what's at stake, it's worth taking a closer look at the current state of customer service: how it plays out in day-to-day interactions and what recent data reveals.

## The state of customer service today

As customer expectations rise, most service teams are falling behind. Customers today expect fast, consistent responses across email, chat, phone, and social media. However, [56% of customers report](#) repeating their issues due to disconnected support channels, clearly showing widespread frustration.

### Did you know?



**56%**

Customers repeat issues due to disconnected support channels

Source: Freshworks Customer Survey

On the business side, support agents are spread thin, often switching between multiple tools just to track conversations, update systems, and tag tickets. While AI and automation are gaining attention, not many support teams are using them effectively. In many cases, they add complexity instead of reducing it. The result is a reactive, fragmented system that is increasingly unsustainable for both sides.

Part of the challenge is that customer preferences vary. Here's how expectations are shifting and where they're starting to align:

### Every generation expects consistency

Gen Z and Millennials, raised on instant access, expect real-time responses via in-app chat, messaging apps, or social platforms. They dislike static forms, prefer rich media, and want seamless, contextual conversations and the ability to pick up where they left off. This group is also more receptive to asynchronous support. They're comfortable dropping a message, stepping away, and picking up the conversation later without reintroducing their problem. The [latest customer service statistics](#) show that 77% of Gen Zers expect brands to offer digital-first alternatives to traditional interactions.

At the same time, older generations still prefer familiar channels like email or phone, but their expectations have evolved, and they expect fluidity there too. For example, if they start on an app and return via WhatsApp, they expect the conversation to continue seamlessly. A [Freshworks survey](#) found that 63% of older adults, 65% of Gen Xers, and 65% of Millennials prefer messaging over email or phone when available.



**63%**

Older Adults (Early-1980)



**65%**

Millennials (1981-1996)



**65%**

Gen Z (1997-2012)

Source: Freshworks Customer Service Benchmark Report

This shift reflects a broader truth: there was a time when messaging was a channel for the tech-savvy. However, it's now becoming the default across all age groups. When designed well, messaging reduces effort, provides more control, and lowers frustration.

## **Customers expect accessibility in support that adapts to real-life context**

Modern CX isn't about being on every channel. It's about ensuring every customer, regardless of age, ability, or preferred mode of communication, can get help easily.

In practical terms, that means removing friction wherever possible. Customers shouldn't need to repeat themselves whenever they switch from chat to email or phone call to WhatsApp. Context should travel with them.

### **Consider how differently people engage with support:**

- A non-native speaker or someone with limited mobility may rely on typed messaging, screen readers, or even AI-powered translation to get their message across clearly
- A logistics field technician might need mobile-first support tools with offline access since they often work in areas with poor connectivity
- A B2B software administrator may prefer detailed, asynchronous email threads for complex technical issues, allowing them to loop in teammates and track solutions.
- Small business owners may want late-night support options or weekend availability, as they often wear multiple hats and manage tasks outside traditional hours.

These instances are common everyday realities, and businesses that ignore them risk alienating large segments of their customer base.

## **Customers expect flexibility in how and when they respond.**

Customers don't always want to chat in real time. They might be commuting, multitasking, or preferring to reply when convenient, fostering the need for support to work around their schedule, not the other way around. This is where asynchronous messaging becomes essential. Unlike traditional live support, asynchronous tools allow conversations to pause and resume naturally, without requiring the customer to stay online or repeat their issue.

### **The benefits are two-fold**

#### **For Customers:**

- They can explain their problem in their own time.
- Share screenshots or photos to provide clarity.
- Leave the conversation and return later without losing context

#### **For Businesses:**

- Agents can handle multiple conversations more efficiently
- All past messages are visible in a single thread, reducing duplication and error.
- Support can be scaled without sacrificing quality.

A Freshworks customer, Clickfunnels, saw this play out in absolute numbers:



**95%**

CSAT score



**2 Min**

First response time

Source: [Freshworks Customer Stories](#)

## **Customers expect service that removes communication barriers**

Truly accessible customer service goes beyond just offering multiple channels; it means ensuring the experience works for people with different needs, environments, and communication styles.

For example, a customer service rep juggling dozens of tickets daily might rely on a streamlined interface that surfaces relevant self-help articles, reducing cognitive load and speeding up resolution time.

At the same time, international teams handling global customer bases benefit from real-time language translation tools and templated responses to maintain clarity across regions. For high-touch accounts or complex B2B workflows, maintaining a consistent conversation history across email, chat, and phone ensures continuity. This allows customers to avoid repeating themselves and enables support teams to pick up where the last interaction left off.

Modern customer service is now much more than just a multichannel problem resolution system. It's adaptable, responds to different needs, accommodates different paces, and ensures every interaction feels coherent, regardless of how the customer reaches out.

# The squeeze: customers vs. agents

The “CX squeeze” is a real pressure point where customer expectations outpace the systems to serve them. Customers want speed, empathy, and seamless support, but agents are juggling too many tickets, too many tools, and too few resources. The result is a widening gap where frustrations build on both sides.

Left unaddressed, this gap inconveniences customers. But beyond that, it creates a chain reaction. Support teams burn out, customers churn, and marketing feels the weight of replacing every lost account. The squeeze tightens, and cracks start to spread across the business.

## Rising customer expectations

The modern customer no longer judges support by whether the issue was resolved. The benchmark has moved.

Today, what matters just as much—if not more—is how quickly, intuitively, and effortlessly that resolution arrived.

A customer facing an issue doesn’t want to wait on hold, fill out a form, or get bounced between departments. They want to explain the problem once and get a helpful response—ideally, within minutes, not hours.

This expectation isn’t just anecdotal; the data supports it.

### Did you know?



**09%**  
of consumers

of consumers think waiting up to a minute to speak with a support agent is acceptable



**42%**  
of consumers

are willing to wait between one and three minutes (but that’s the upper limit)

Source: [Freshworks Survey](#)

That gives businesses a window of just a few minutes to make a good impression.

## Agent fatigue and fragmented workflows

Behind the scenes, many teams still work with systems that weren't built for modern expectations.

- **Agents toggle between tools:** CRM, ticketing, phone, chat, and help articles—none are unified. This constant switching adds to cognitive load and slows down response time.
- **Work is spread across silos:** Data lives in one tool, conversations in another. There's no shared context, meaning agents must manually piece together customer histories.
- **Burnout is a genuine concern:** High-stress environments, combined with repetitive tasks and unrealistic performance targets, make customer service workers susceptible to burnout.

## The hidden cost of inefficiency

Fragmented systems slow down teams, increase errors, and make it harder to scale support as the business grows.

Here's everything it negatively impacts:

- **Lost productivity:** A report found that employees waste up to 20% of their time searching for relevant information due to disjointed systems.
- **Inconsistent experiences:** Without context, responses often feel robotic or misinformed, damaging customer trust.
- **Scaling becomes more challenging:** As teams expand, adding more tools only increases complexity unless workflows are correctly integrated.

### Did you know?



**20%**

of employees' time is wasted searching for relevant information due to disjointed systems.

Source: Freshworks Customer Survey

Source: [Freshworks Customer Service Benchmark Report](#)

In short, legacy systems force a trade-off between speed and quality. And that's a trade-off modern customers won't tolerate.

# The solution: a modern customer service platform

Companies require a system that benefits both parties to address the growing gap between what customers expect and what agents can deliver.

That means offering proper omnichannel support to customers, allowing them to reach out however they prefer—whether through chat, email, WhatsApp, or phone—and ensuring agents don't have to search multiple tools for the information they need.

Every conversation should feel connected and effortless. Modern platforms make this possible by giving agents a single view of every conversation across all channels, so customers never have to repeat themselves, and agents can respond faster. Built-in templates, canned responses, and conversation histories reduce repetitive effort, while managers gain visibility into SLAs, response times, and overall sentiment without relying on multiple dashboards.

But modern service isn't just about spitting out canned replies; it's also about AI agents. **AI agents are trained on your knowledge base, past tickets, and policies, so they can handle complex issues with full context and resolve queries from start to finish.**

It also means giving agents the right kind of help: not just automation but intelligent tools that assist in real time. Tools that summarise previous chats, suggest helpful replies, and handle repetitive questions so agents can focus on helping customers quickly and delivering service that feels human, consistent, and effortless.

Here's the before-and-after impact: how the right platform solves everyday service challenges for customers and agents

## The benefits are two-fold

### Problem

- Disconnected channels
- Agent fatigue from manual tasks
- Missed context, repeated questions
- High ticket volumes
- Cost pressure

### With a modern customer service platform

- One platform for all conversations
- AI Copilot handles summaries, suggestions, and routing
- Shared history across channels and teams
- Agnetic AI deflects and resolves common queries
- 225–462% ROI (Forrester, 2024)

# Why businesses need the right customer service software

Customer expectations are evolving faster than many businesses can keep up, and outdated internal systems are showing cracks. When service tools lag, it's not just response times that suffer; it also leads to dwindling loyalty, frustration, and every interaction becoming a churn trigger.

Staying ahead now requires more than chatbots or quicker ticket routing. Businesses need intelligent service platforms that balance customer convenience with agent clarity, empowering teams to resolve issues seamlessly and creating an effortless experience that keeps customers returning.

## Key Benefits:



### Faster Resolutions and Happier Customers.

When support teams can access real-time conversation history, reply templates, and smart automations, customers get answers more quickly and consistently. Customer agents don't need to bounce between multiple channels and ask repetitive questions.



### Empower Agents Through Agentic AI.

Repetitive questions wear down even the best agents. Smart software changes using agentic AI provide agents with contextual summaries, reply suggestions, and prioritised inboxes based on ticket urgency or sentiment.



### Lower Support Costs Without Sacrificing Quality.

A modern customer service platform does more with less by automating low-level queries, enabling self-service, and improving first-contact resolution. That helps companies cut costs while also scaling the team's impact.

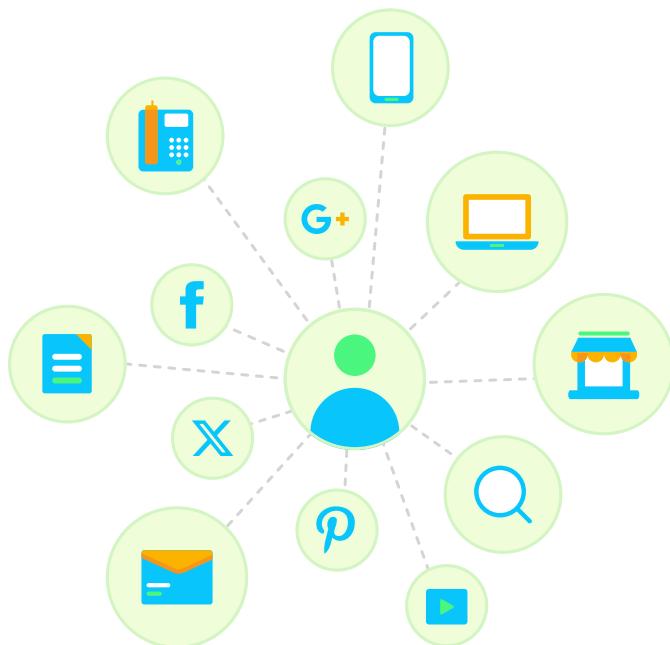
## Must-Have Features (and Why They Matter)

Every customer service platform claims to offer a wide set of features. However, when deciding to impact customer satisfaction and team morale, the focus shouldn't be solely on feature quantity. It should be on what your team needs to deliver consistent, high-quality support at scale.

Here are the four non-negotiables every modern customer service tool should deliver and how they make a difference.

## Omnichannel Support

Customers don't think about channels, rather, they think in terms of conversations. They expect to move between email, chat, WhatsApp, and phone without losing context. Support teams must meet them where they are and maintain a coherent conversation. And omnichannel engagement is no longer optional.



### Did you know?

Customers prefer messaging and web channels for support.



**31.77%**  
Web



**19.70%**  
WhatsApp Business



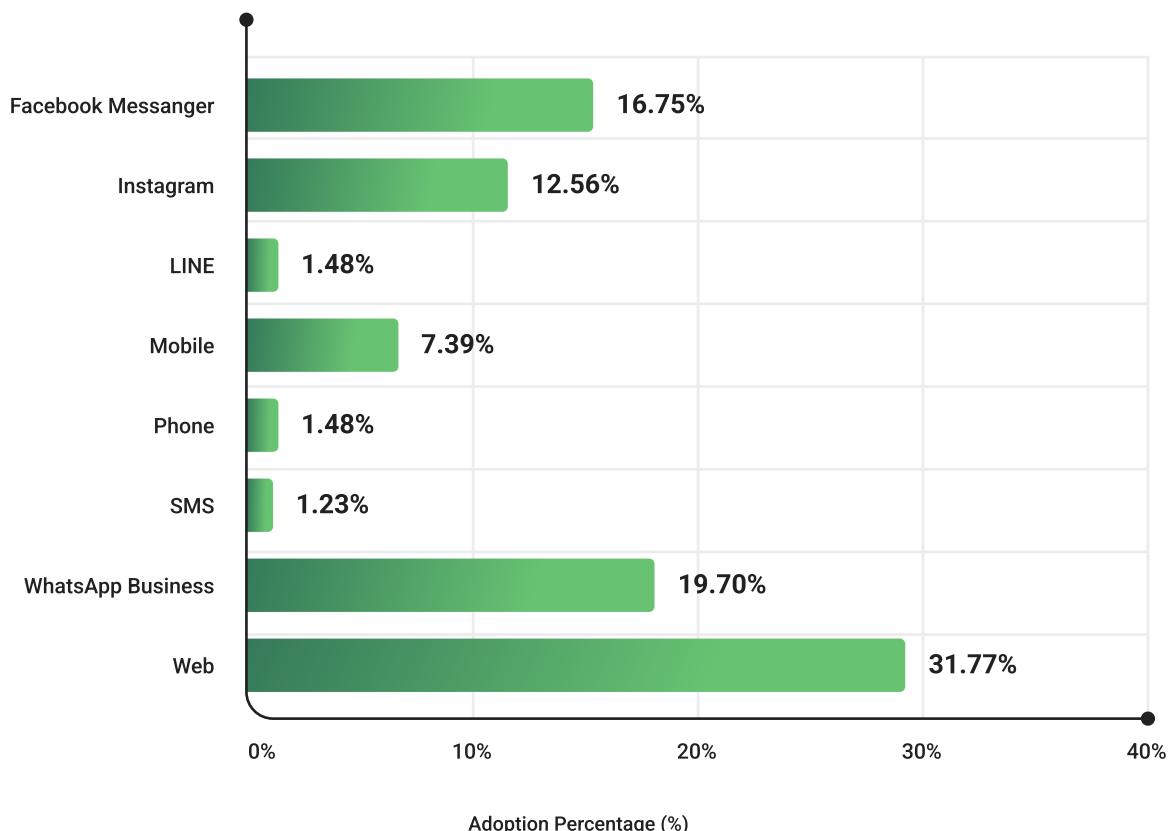
**16.75%**  
Facebook Messenger



**12.56%**  
Instagram

Source: [Freshworks Data](#)

## The multi-channel support advantage



Preferred support channels in travel and hospitality: Web and WhatsApp Business lead, with messaging apps overtaking traditional channels.

Source: [Customer Service Benchmark Report 2025](#)

This trend shows that customers increasingly expect fast, seamless support across multiple messaging platforms and choose brands that can deliver it.



### What to look for:

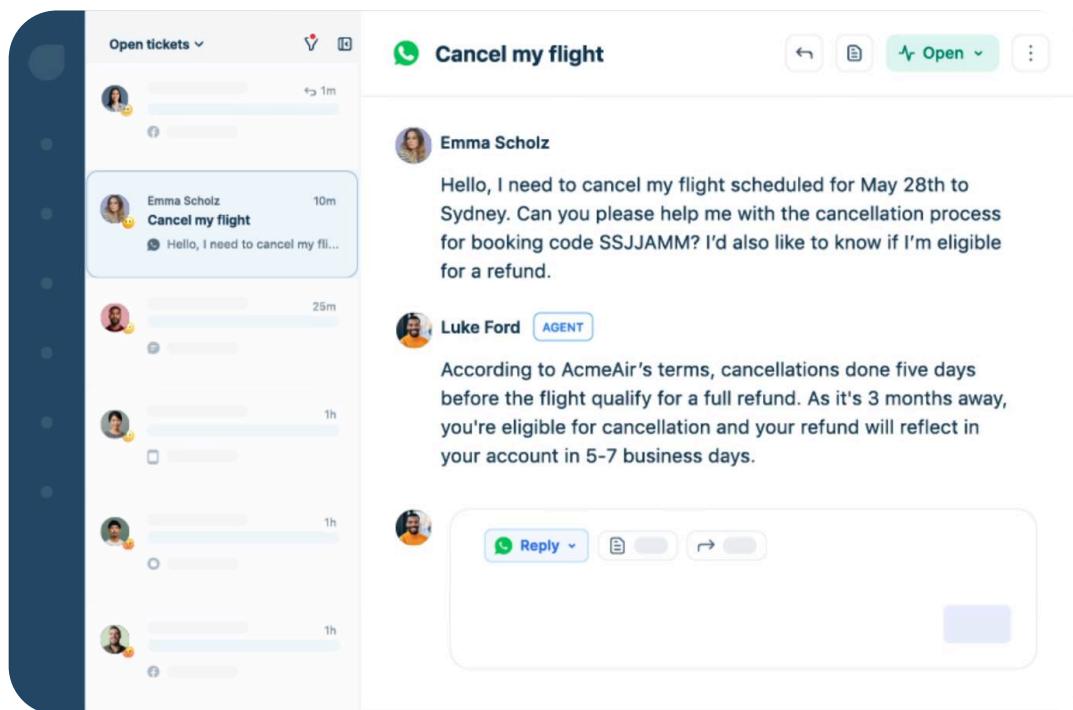
- One workspace for all channels
- Context carried across touchpoints
- No-code channel configuration

## Assistive and Agentic AI

Support teams don't need abstract "AI-powered platforms." They need practical tools that reduce cognitive load and help agents respond quickly and precisely

This is where Assistive AI (Copilots) and Agentic AI (Autonomous Agents) come in, each playing a distinct but complementary role.

- **Assistive AI (copilot):** Think of it as the agent's sidekick. These tools suggest replies to common customer questions, summarizes long ticket threads, and even translate messages inside the agent workspace, eliminating the need for screen-hopping or manual copy-paste. Agents stay in control, but their workload shrinks dramatically.



An example of an AI Copilot suggesting replies, summarizing chats, and translating messages—right inside the agent workspace. No switching tabs, just faster, smarter support. ([Source](#))

- **Agentic AI (AI agents):** These tools don't just assist; they act. AI agents can fully handle routine tasks like password resets, order tracking, or basic account updates, freeing up human agents for nuanced, relationship-driven issues.

For example, a Copilot drafts a thoughtful reply for a delayed shipment query. If the issue is straightforward (like tracking an order), an AI Agent resolves it entirely without manual intervention.



### What to look for:

- AI copilots that assist (not override) agents
- AI agents that can act with nuance on behalf of your agents
- Predictive insights on incoming volume, ticket trends
- Clever deflection for Tier 1 queries

## 360° customer view

Support becomes inefficient when agents lack the complete picture, including purchase history, past interactions, and preferred channels. The right platform should bring this context to the forefront and give agents a unified view, allowing them to respond faster and more accurately.



### What to look for:

- Unified customer profiles with recent tickets, channel data, and CRM insights
- In-line access to prior interactions
- Alerts for VIP customers or churn risk

## Data security and compliance

Customers won't trust brands that cannot keep their data safe, which is even more critical for companies in regulated industries. At the same time, global businesses must meet compliance requirements like GDPR, HIPAA, SOC 2, and ISO 27001.



### What to look for:

- Role-based access controls
- Data encryption (at rest and in transit)
- Regular audit trails and certifications like HIPAA, SOC 2, and GDPR

## The end goal: choose a platform that scales with you

Whether you're a 10-person support team or a 500-agent operation, the fundamentals remain the same:



### What to look for:

- Give customers fast, connected, and convenient help
- Support agents with the right tools, not more tabs
- Use automation where it makes sense, but never at the expense of empathy
- Keep your operation lean, secure, and ready to grow

PART TWO

# The Market in 2025



As of 2025, the global customer experience (CX) market continues to expand, with the CRM space projected to grow from ~\$101 billion in 2024 to \$263 billion by 2032, at a compound annual growth rate (CAGR) of ~12.6%.

## Three major forces will fuel this growth:

- Rising customer expectations for speed, personalisation, and consistency
- Post-pandemic digital maturity—businesses are more tech-forward and cloud-first
- The mainstreaming of AI, particularly agent-assist, insight generation, and autonomous support

Overall, the customer service software market has experienced rapid growth and is expected to continue doing so. Still, most tools fall into two categories: outdated legacy systems or modern platforms built for today's needs.

## Legacy vs. modern customer service platforms

Legacy support systems were built for a different era. Think call centres with on-premise software, siloed helpdesks, standalone live chat tools, and teams managing tickets through spreadsheets. These setups often force agents to switch between tabs, dig for customer history, and work without the whole picture. And the systems not being able to keep up with today's multichannel, always-on customer expectations shows:



### Key challenges with legacy support systems include:

- 1 **Data lives in silos.** Phone logs, chat history, and email tickets are stored separately, with no shared customer context.
- 2 **Integrations are clunky.** Connecting tools often requires IT effort, third-party plug-ins, and workarounds that don't scale.
- 3 **Automation is minimal.** Most workflows are manual, and there's no built-in intelligence to assist agents or predict customer needs.
- 4 **Scaling is expensive and slow.** Adding channels, teams, or geographies means layering on more tools, licenses, and overhead.

As a result, customers wait longer, conversations feel disjointed, and agents burn out faster. Customers now expect to start a conversation on one channel (say, Instagram DM) and pick it up later on another (like email or chat) without needing to repeat themselves. Legacy systems, which were designed when support meant replying to emails or picking up phone calls and calling it a day, simply can't keep up with that fluidity.

Modern platforms solve for this by unifying the whole process. They combine channels into a single view. Agents can see the full conversation history, respond faster, and stay focused. Setup is more straightforward, updates are automatic, and it's easier to scale as the team grows. They are built from the ground up for omnichannel engagement, agent collaboration, and AI-native workflows. And the experience and outcome are far superior in comparison:



## Key advantages of modern platforms include:

- 1 One workspace for every channel.** Modern platforms bring email, chat, WhatsApp, and phone into a single view. Agents no longer need to switch between tabs or tools—they can view the entire conversation history in one place, regardless of where the interaction began. This saves time and ensures customers don't have to repeat themselves.
- 2 Built-in AI assistance.** AI agents and copilots like Freddy AI support agents during live interactions. For example, a retail company using Freddy might receive a high volume of “where is my order” queries. Freddy can instantly suggest replies, summarise the customer’s order history, and even flag delayed shipments, so agents don’t have to search for this information manually.
- 3 No-code automation.** Teams can set up workflows, auto-responses, and routing logic without writing code or relying on developers or IT. Teams must establish rules for routing tickets, triggering emails, and other similar tasks.
- 4 Unified customer profiles.** Every customer interaction, past purchase, and preference is stored in a single timeline, making personalisation easier and faster. This means agents can find relevant information and offer clients personalised support without digging through multiple systems for context.
- 5 Scale with your team.** Whether you have five agents or 500, these platforms support growth without the growing pains. You can add new customer support channels, expand automated workflows, and onboard new agents with role-based access without disrupting your current operations.

Platforms like Freshdesk, Zendesk, and Customer are leading examples of this category. They combine multiple support channels into a single interface, automate repetitive tasks, and give agents real-time access to customer history, making delivering faster, more personalised service easier. The result? Less busywork, faster support, and a better customer and agent experience.

PART THREE

# The Guidelines



# Guide to choosing: steps, checklists and assessment guidelines

## Internal assessment: know your starting line

Before browsing vendor features or comparing pricing, clarify what your current setup can and cannot do.

Think of it like renovating a home. You wouldn't start picking out new furniture without first checking what needs fixing in the foundation, plumbing, or wiring. The same goes for your support setup. Without a clear picture of your current tools' performance (what's working, what's breaking down, and what's slowing your team), you risk layering new software on top of old problems. That only leads to more complexity, not better support.

### This step helps avoid two common pitfalls during software selection:

- Overpaying for capabilities you don't need
- Undershooting improvements by misunderstanding your core challenges

This also helps you prioritise needs and choose a solution that scales with your team.

Here's how to perform a practical and growth-focused internal review.

## 1 Identify your pain points

Support teams rarely fail because of a lack of effort. More often, invisible inefficiencies, such as disjointed tools, repeated tasks, and missing context, quietly drag down performance.

It's a more common problem than it looks on the surface. As teams stack up tools to solve different problems, cracks begin to show: missed updates, poor handoffs, and duplicated work.

### Did you know?



**90%**

of service practitioners say repetitive, manual tasks prevent agents from focusing on meaningful work.

Source: [Freshworks Customer Service Benchmark Report](#)

Take a simple example: a customer contacts the agent on WhatsApp. The agent replies, logs the issue in an internal ticketing system, refers to an FAQ stored in a shared drive, and then checks a separate CRM for order history.

That's four tools just to answer one question. Multiply that across a team, resulting in longer resolution times, higher error rates, and agent burnout.

That's why the first step in choosing the right platform is understanding what's slowing you down.

Recognising pain points early ensures your future system solves real operational bottlenecks.

### Here's where to start when it comes to identifying your pain points:

- **Are agents still relying on spreadsheets, email folders, or disconnected tools to manage tickets and conversations?**

If so, they're likely spending more time finding information than resolving issues.

- **How many apps do agents use in a typical day, and do they integrate well?**

This includes your CRM, helpdesk, call centre tools, feedback trackers, and internal chat apps. Are they talking to each other? Or are agents re-entering data and switching tabs constantly?

- **Are common operational issues becoming chronic?**

Do you notice patterns such as ticket backlogs, SLA breaches, or customers having to explain the exact problem multiple times?

Identifying these friction points early does more than justify the need for change—it ensures your next system solves the problems your team faces every day.

## 2 Evaluate current systems

After evaluating your core pain points, the next step is thoroughly assessing your support tools. You might be using legacy tools set up years ago and haven't kept pace with how customers behave today. Even if things seem to be working, the cracks usually show up subtly: long resolution times, repeated questions, rising workloads, or slipping CSAT. You need to understand what's happening upstream to fix these downstream issues.

Here are four critical areas to examine:

### Omnichannel capability:

Customers don't care about channels—they just want help. Wherever they communicate they expect continuity. That means your platform needs to consolidate all these channels into a single view for the customer and the agent.

#### Questions to consider:

- Are your support channels natively integrated, or do agents juggle multiple dashboards?
- Can agents access the full interaction history, regardless of channel?
- Is channel-switching seamless for both the customer and the support team?

### AI readiness:

AI can improve support, especially if built into the system and not added as an afterthought. By incorporating a human-in-the-loop approach, AI directly assists agents in their workflows while ensuring critical decisions are guided by human judgment.

The goal is not to achieve complete automation but to reduce manual overload, improve consistency, and empower agents to respond faster and more accurately with better context.

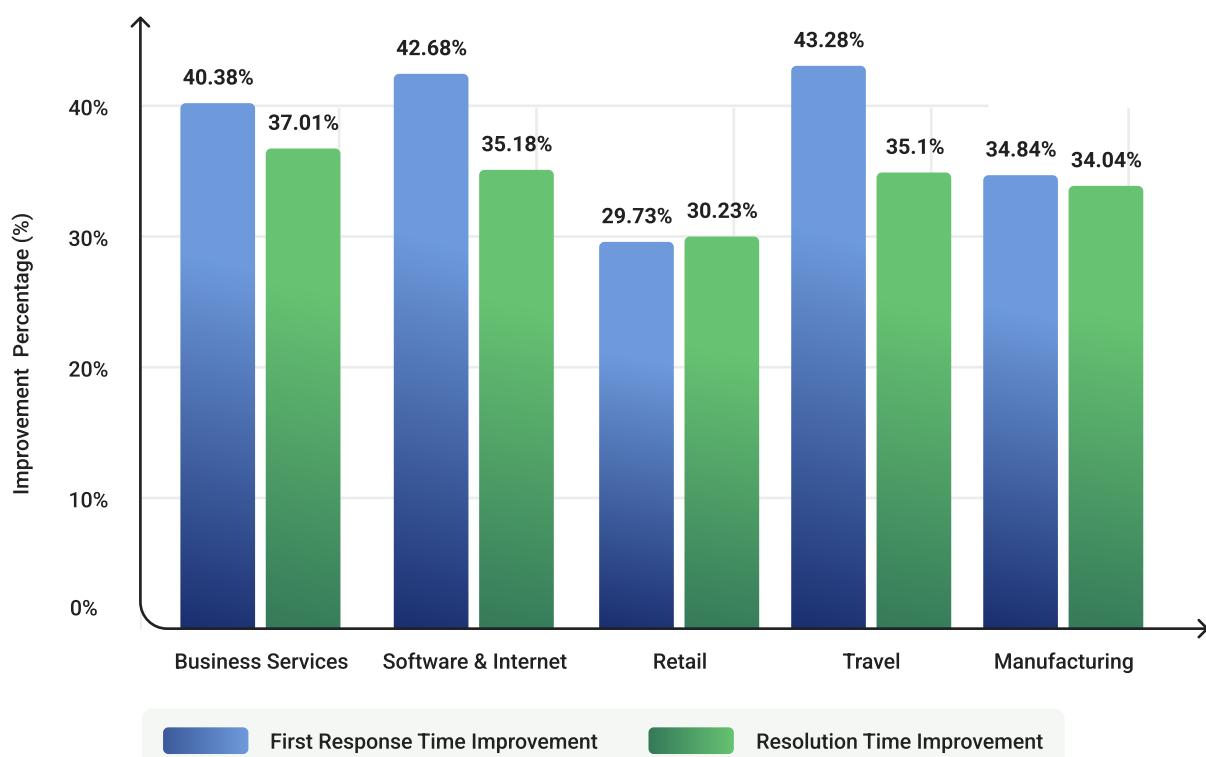
#### Notice whether your current system can:

- Suggest replies based on previous tickets or the context of the conversation.
- Auto-summarise long customer threads for faster comprehension.
- Deflect repetitive tickets via intelligent chatbots or guided self-service.

For instance, [Freddy AI](#) provides in-the-moment reply suggestions and summarisation, helping agents save time and reduce manual effort.

According to our latest [customer service benchmark report](#), companies using agent-assist AI like Freddy saw up to a **43.28% improvement in first response time** and a **37.01% improvement in resolution time**, depending on the industry.

## Impact of Freddy A1 Copilot on First Response & Resolution Time by Industry



Freddy AI Copilot delivers consistent improvements across industries, boosting **first response times by up to 43%** and **resolution times by up to 37%**.

(Source: [Customer Service Benchmark Report 2025](#))

If your current customer service software doesn't come equipped with this level of AI readiness or feels disconnected from how your agents work, that's a sign your system may not be fully ready.

### Ease of modification and maintenance:

Your tech stack should serve your team, not the other way around. As needs change, you'll want to add new workflows, tweak automations, or onboard new channels. If every small change requires developer time, your platform will eventually bottleneck your progress.

## **See whether your current system has the following features:**

- Can non-technical users create or modify workflows through a visual builder?
- How easy is adding a new support channel, like Instagram DMs or in-app messaging?
- Is your support team dependent on IT or vendors for every update?

## **Support for custom use cases:**

Every business has its quirks. You might need conditional approvals, custom SLAs for enterprise customers, language-specific routing, or escalation rules based on order value. Your support stack should allow for this kind of real-world flexibility

## **Evaluate whether your current system allows the following:**

- Can you set up dynamic SLAs (e.g., priority based on order size)?
- Is there a way to route tickets based on customer tier or product category?
- Can you automate approval chains, cross-team workflows, or task assignments?

### 3 Check your reporting & analytics

Real-time analytics allow companies to intervene when SLAs are about to slip and spot sudden surges, like shipping issues, before they balloon. They also help supervisors manage staffing or reassign tickets to avoid resolution delays and maintain customer loyalty.

However, not all platforms can deliver this kind of visibility. Many still rely on delayed, spreadsheet-heavy exports that leave teams reacting late, rather than responding in the moment.

As you assess your current system, ask whether your analytics cover the following:

#### Operational KPIs visibility:

- **Trends and spikes:** Are more tickets coming in than usual?
- **SLA compliance:** Which tickets are at risk of breaching, and why?
- **Channel health:** Are specific support channels underperforming or causing backlogs?

#### Agent performance:

- **Workload balance:** How many tickets is each agent handling?
- **Resolution metrics:** What are the first-contact resolution and average handling times?
- **Sentiment tracking:** Are customers expressing frustration more frequently in specific queues?

This is where AI-powered analytics can make a meaningful difference. They help by surfacing patterns humans might miss and quickly avoiding resolution delays that erode customer trust.

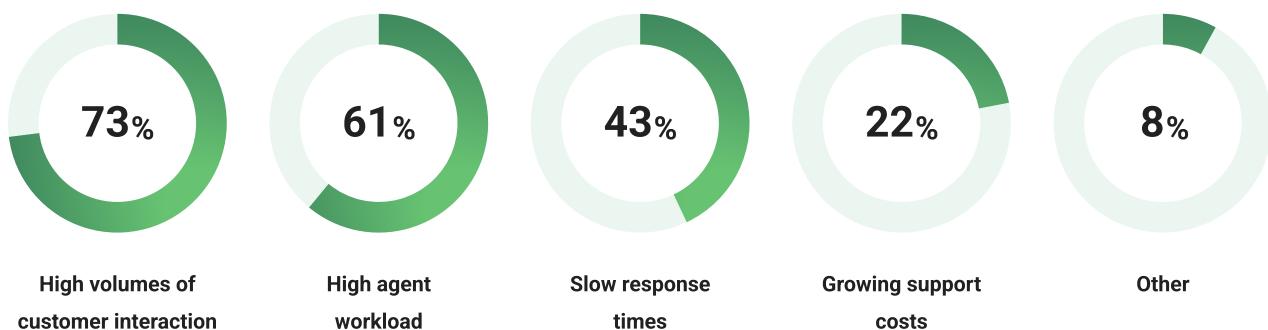
The result? Quicker action, more accurate planning, and more confident customer communication.

## 4 Map your customer journey

Customer journeys are rarely linear, but support systems treat them that way. When context is lost across channels, customers get frustrated, and many quietly give up.

That's why mapping matters: 73% of customer service teams say they're overwhelmed by high volumes, and 61% cite rising agent workload as a key concern.

### Top business challenges teams aim to solve with Freddy A1 Agent by percentage of responses



(Source: [Freshworks Customer Service Benchmark Report 2025](#))

Without a mapped, visible journey, prioritising and resolving these issues becomes harder, leading to delays, repeat queries, and missed opportunities.

#### Here's why it matters:

- **Missing context means frustrated customers.** Agents risk asking the same questions repeatedly or losing track when a customer switches from email to chat mid-journey.
- **Funnel leakage.** Without mapping, businesses struggle to know where customers disengage—during IVR loops, chat wait times, or support drop-offs.
- **Missed insights.** Disconnected data hides key signals, like repeated password questions or high-value customers struggling silently

Journey mapping shows you what happened and precisely why, allowing you to address the issue without requiring your customers to jump through hoops.

## Here's everything you should assess and map:

- **Complete Interaction Timeline:** Track key touchpoints, including website visits, self-service searches, chat, email, social messages, phone calls, and even callbacks. Visual mapping shows how customers move across different media.
- **Wait and Drop-off Metrics:** Identify where customer engagement declines and service interactions are abandoned—a gap that can only be addressed by logging and analysing session drop-offs.
- **Channel Preferences and Shifts:** Note channel switches, such as email to chat or chat to call, and whether customers stay in a single context or are forced to restart.
- **Sentiment and Satisfaction Trends:** Pull CSAT, NPS, sentiment, and escalation data at each stage. Are customers happiest on first contact, or after lightning-fast agent replies?
- **Root Causes of Repetition:** Identify choke points, such as agents needing to reconfirm order IDs or billing information that a unified profile could have surfaced.

A clear journey will provide every team member with complete insight, so the following action is evident at every step.

## 5 Define budget & scale

Over half of organisations have underutilised CX investments, which results in wasted license fees and stalled ROI. For example, organisations, while having subscribed to martech tools, have not utilised them to their full potential. And according to Gartner, martech utilisation has dropped to just 33% in 2023, a sharp decline from earlier years. The same scenario could play out with CX platforms if you don't plan holistically. You risk buying unused software adding to higher TCO. To avoid that, your budgeting needs to cover not just initial costs, but scale, adoption, and payoff.

Think beyond simple per-agent pricing. Here's everything to consider when building your budget:

- **Build a realistic budget** by accounting for more than just per-agent license fees. Include one-time setup costs, data migration, custom integrations (e.g., with CRM or telephony), and ongoing subscription fees across a 12–24 month planning horizon.
- **Forecast for growth and change** by estimating how your support needs might evolve. Will your ticket volume double next year? Are you planning to add new support channels like WhatsApp or launch a customer-facing help centre? Your platform should be able to accommodate these changes without requiring a costly overhaul.
- **Evaluate long-term total cost of ownership (TCO)** by looking beyond software pricing. Take note of the impact on agent productivity, onboarding time, infrastructure overhead (especially moving from on-premise to cloud), and potential savings from automation and AI-driven deflection. A platform that reduces manual workload or agent turnover can deliver far greater ROI over time.

This approach ensures your investment is kept busy and delivers real value.

## Vendor evaluation checklist

Now it's time to evaluate the vendors based on your pain points and customer journey mapping. That said, it's not all about checking boxes. The goal is to determine whether a platform aligns with your team's needs, growth trajectory, and customers' expectations.

Use this checklist to guide conversations, score potential partners, and make a confident, informed choice.

### Key factors to evaluate before selecting a vendor:

#### AI Agents and Assistive Capabilities:

If so, they're likely spending more time finding information than resolving issues.

#### Omnichannel Support:

Does the platform allow your team to manage email, live chat, phone, social media, and messaging apps (like WhatsApp) from a unified interface?

#### Integration with CRMs, Messaging Apps, and E-commerce Platforms:

Can the platform easily connect with tools like Salesforce, HubSpot, Shopify, or internal CRMs? Are these integrations built-in or reliant on third-party middleware?

#### SLA Management and Escalation Capabilities:

Can the system define multiple SLA policies based on customer tier or issue type? Does it automatically alert or escalate when SLAs are at risk?

#### Intelligent Ticketing and Workflow Automation:

Can the platform automatically assign, tag, or prioritise tickets based on content, sentiment, or channel?

#### Call Routing and IVR Capabilities:

If your team handles voice support, does the platform include native telephony, intelligent call routing, and configurable IVR flows?

#### Contextual Conversation Routing:

Does the system route tickets or conversations based on agent skills, language, past interactions, or geography? For instance, Freshworks' skill-based routing allows teams to direct Spanish-language queries to Spanish-speaking agents or prioritise high-value customers for senior reps, using data pulled from CRMs or ticket history.

#### Cloud-Native Infrastructure and Compliance:

Is the platform built for the cloud from the ground up? Does it meet global compliance standards like GDPR, SOC 2, and ISO 27001?



#### No-Code Customisation and Serverless Extensions:

Can business teams create automations, configure workflows, or build simple integrations without writing code?



#### Total Cost of Ownership (TCO):

Beyond licensing, what are the costs of implementation, training, custom development, and ongoing maintenance?

## How to use this checklist

- **Score each vendor** on a 0–5 scale (0 = missing, 5 = world-class) per criterion.
- **Calculate weighted scores** based on your priorities (e.g., AI = 30%, compliance = 15%).
- **Include trial testing:** Confirm that the vendor offers a free trial and that the features aren't just listed but work intuitively
- **Request TCO models from vendors.** Compare mock scenarios, like adding 20 agents next year.
- **Review references:** Ask vendors in your industry for use cases to validate promises.

## How does Freshdesk score?

Freshdesk stands out as a strong contender among the platforms you'll evaluate. It's built for growing teams that want an AI-first approach to customer support without sacrificing ease of use or blowing up budgets.

### Here's how Freshworks measures up against this checklist:



# 4.5/5

AI Assist

With Freddy AI, Freshdesk goes beyond a simple chatbot, offering ticket summaries, intent detection, and agent assist tools that work in the support flow.



# 5/5

Omnichannel Strength

From email and chat to voice, WhatsApp, and social, Freshworks unifies it all into one seamless interface.



# 4.5/5

Workflow & Automation

Smart routing, SLA alerts, and ticket tagging keep support teams efficient and customers happy



# 5/5

TCO

Transparent pricing, quick implementation, and minimal dev dependency make scaling cost-effective.

When you run Freshworks through this checklist, it becomes apparent why it's a standout option for support teams. The platform brings together the essentials, like omnichannel support, SLA management, and intelligent automation, in a way that feels cohesive and easy to use. At the same time, its advanced capabilities, like AI assist and contextual routing, are thoughtfully built in so teams can adopt them without added complexity

## Future-Readiness: staying ahead of the curve

The tools you choose today will help you grow or slow you down tomorrow. Many teams face the same problem: things work fine at first, but as ticket volume increases, new channels are added, or more agents join, the system starts to lag. Response times slip, workflows get messy, and agents spend more time managing tools than helping customers.

To stay ahead, you need a platform that scales with you. That means being able to onboard new agents during a seasonal spike without spending weeks on training or setup, or supporting a sudden surge in tickets during a product launch without needing to plug in extra tools or switch between systems just to keep up. It also means being able to roll out AI features like auto-replies or conversation summaries when your volume grows without reworking your entire workflow.

The point is that staying ahead isn't about predicting every change. It's about choosing systems that will remain functional when your business changes.

Evaluating a platform's future-readiness means asking:

- Will this software still serve us when we double the ticket volume?
- Can we adopt AI naturally, not as a bolt-on?
- Will our agents perform better with automation or be replaced entirely?

Let's see the markers of a truly forward-looking solution and a real-world case study to ground these ideas in impact.

## Key considerations for future-readiness

### 1 Is the platform built AI-first or just AI-enabled?

Not all AI is created equal. Many legacy platforms claim to offer AI to empower customer service agents, but some do so through external plug-ins, which are limited to a few canned responses or static rules.

In contrast, AI-native platforms like Freshworks are designed from the ground up with AI woven into the workflow. This creates a seamless experience where:

- Agents receive real-time reply suggestions based on ticket context and sentiment.
- AI summarises long conversations for faster resolution.
- Insights from AI directly inform workload management and SLA prioritisation.

When AI is embedded directly into the platform, rather than added through third-party plug-ins or separate modules, it can natively access real-time ticket data, customer history, and workflow context. This enables the AI to provide more accurate suggestions, faster responses, and smoother automation, as it works with the same information and tools the agent uses.

AI becomes a seamless extension of the team's workflow, not a disconnected feature they must work around.

## 2 Does it offer agentic AI, not just automation?

While traditional automation can handle predefined tasks, such as sending an email confirmation or assigning a tag, Agentic AI takes it several steps further.

Think of it as a skilled teammate who understands the nuance of a support conversation, anticipates what might come next, and helps the agent stay focused on more critical issues that require human intervention.

For instance, imagine an agent receiving a ticket from a long-time customer frustrated about a delayed refund. Here's how an Agentic AI system would help:

- It immediately summarises the customer's last three interactions about the same issue, highlighting tone and urgency
- It flags that this customer is marked "at-risk" in the CRM and has a history of escalation.
- It suggests a tailored response that acknowledges the delay, provides the latest refund status, and offers a goodwill voucher, based on previous successful resolutions for similar issues.
- If the agent accepts the suggestion, it automatically fills in the message, attaches the refund policy article, and routes the case to a senior representative if needed.

Agentic AI acts with intelligence, empathy, and intent. It behaves much like an experienced colleague would: scanning the situation, identifying next steps, and nudging the agent toward the most effective outcome.

For example, in Freshworks' ecosystem, tools like Freddy Copilot allow agents to manage high ticket volumes without losing quality. They don't override human decisions but bring the best of machine support to the moment it's needed.

## 3 Is the platform evolving toward autonomous support?

### Did you know?



**53%**

of customer queries across industries are now deflected or resolved by Freddy AI Agents, without human intervention.

Source: [Freshworks Customer Service Benchmark Report](#)

Future-ready platforms should already offer:

- AI agents that resolve common queries end-to-end (e.g., order tracking, password resets, appointment scheduling).
- Escalation only when needed, ensuring faster service while reserving human expertise for complex cases.
- Data-backed learning loops where AI improves from outcomes, not just inputs.

## Data-backed impact: what future-readiness looks like in the real world

To understand what real future-readiness looks like in action, consider the [example of Commercial Bank of Dubai \(CBD\)](#), one of the UAE's largest banks with **over \$23 billion** in assets and a strong focus on digital-first services.

### The challenge:

CBD's customer service teams operated in a fragmented environment. Customer queries were received through multiple channels, primarily email and phone, and manually sorted into various mailboxes by the team without a structured ticketing, ownership, or tracking system.

This led to:

- High agent workload with no straightforward routing process
- Limited visibility into ticket status or resolution quality
- Delays in handling even basic queries due to poor coordination

CBD's commercial customers, which include government bodies and financial institutions, deal in high-value transactions. Any delay or lack of clarity had a significant impact on their reputation. They needed an urgent change.

### The solution: Freshworks' automated customer service

CBD adopted Freshdesk, Freshworks' modern customer service platform designed to unify support channels, streamline workflows, and reduce agent effort. The implementation was backed by careful planning and supported by Freshworks' success team to ensure customer adoption and smooth onboarding.

They leveraged key features like:

- Round-robin ticket assignment for balanced agent load
- 60+ automation workflows for routing, tagging, and replies
- Microsoft Dynamics CRM integration for ticket channelling
- A self-service knowledge base with 500+ help articles

## **The outcomes:**

The results were measurable and transformative:

- **Thanks to structured workflows and automation, ticket resolution time dropped by over 50%.**
- **Monthly ticket volume reduced from 2,500 to 1,800** due to improved self-service adoption and customer education.
- **100,000+ knowledge base views enabled faster**, no-touch resolution for basic queries.
- **Analytics-driven coaching** boosted agent productivity and CSAT tracking.
- **Improved SLA compliance and prioritisation** using custom tags and routing logic, especially for high-value customers.

## **The takeaway:**

CBD's story is a perfect example of what future-readiness looks like in practice.

Instead of just speeding up their old process and adding automation to patch over inefficiencies, the bank used Freshworks to redesign it, automating routine queries, making it easier for customers to help themselves, and giving agents the information they need to focus on more complex issues.

The result was faster resolution times, lower ticket volumes, and a team that could scale without burning out. It's a strong example of how AI can make customer support more efficient and future-ready when built into the system.

# Building the right system for what comes next

Choosing customer service software is like building a transportation system for your city. If roads, trains, and buses run well but don't connect, commuters get stuck in the transfer. The same thing happens in customer service when conversations, tools, and data exist in silos.

That's why teams today need more than individual channels or tools. They need a connected platform that brings conversations together, empowers agents to respond quickly, and grows with the business. This guide has walked through how to assess systems not just for what they solve today, but how they set you up for what's next.

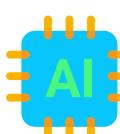
## What a future-ready support platform looks like

If you're using disjointed systems for phone, email, chat, and messaging apps, your agents are likely spending more time managing tools than helping customers. A modern customer service platform eliminates this friction by offering a unified workspace with built-in automation and AI, which makes the most impact.

**Freshdesk** is precisely purpose-built for the future of customer support. It unifies email, chat, phone, and social media into a single, intelligent workspace, helping companies with speed, scale, and seamless collaboration. With built-in AI like **Freddy AI copilot**, agents get instant ticket summaries, contextual response suggestions, and intelligent workflow automation, helping them do more, faster.

But the future doesn't stop at assistance. AI agents are now independently resolving entire categories of routine queries, from password resets to order updates. This allows human agents to devote more time to the moments that require empathy and judgment.

### Did you know?



**83%**

of top-performing companies use AI agents to achieve resolution times under 2 minutes while maintaining CSAT scores as high as 97–100%.

Source: [2025 Customer Service Benchmark Report](#)

Freshworks helps you operate at that level, combining AI agents' instant efficiency with human support teams' empathy

## **What you can do next:**

- Use the checklists and questions in this guide to evaluate your current tools.
- Compare different vendors using the feature-by-feature breakdown we shared.
- Think about what your team needs today and how your customer service should look a year from now.

If you'd like to see how a connected, AI-powered platform works in practice, starting with a [free trial of Freshdesk](#) is a significant first step.