

Managing New Clients and Embedding Customer Support Portals with **BoldDesk**[®]



Background

ConsultorsBPM helps clients pinpoint where their business processes can benefit from the application of software. Whether clients need low-code, AI-powered Microsoft Power Apps, help configuring cloud infrastructure, or fully custom .NET applications, the company can provide all these solutions and more to help businesses improve their operations.

Challenges

As its client base grew, ConsultorsBPM required a proper ticket management system for handling customer support. The system needed to be customizable to meet the diverse needs of both the company and its clients, but quick and easy to configure. Though the company had used Jira and Azure DevOps in the past, they were kept internal and inaccessible to customers, as they are more suited to managing development tasks.

Solution

As a member of the global .NET community, ConsultorsBPM was already familiar with Syncfusion[®], and therefore knew about its line of enterprise solutions, including BoldDesk[®]. “Not knowing the products Syncfusion offers is simply a sin,” said Jordi Burgas of ConsultorsBPM. “BoldDesk, like BoldSign[®] and Bold Reports[®], is a very interesting product.”

BoldDesk had everything ConsultorsBPM needed, particularly flexibility and affordability. The company implemented BoldDesk in two ways: as a contact portal for customers and potential clients, and as an embedded support module in a tax management platform. When the company had questions about setting up BoldDesk, the BoldDesk support team was



quick to respond and follow up, even offering the opportunity for a Microsoft Teams call to discuss additional needs.

Results

Adopting BoldDesk granted ConsultorsBPM efficiency improvements that were immediately reflected in the customer support experience. “Structuring all requests and incidents in a centralized location helps provide much more satisfactory service to the customer,” said Jordi.

Customer inquiries become tickets with clear deadlines, complete conversation histories, and appropriate assignees. On the customer end, issues don’t disappear behind an impersonal, dubious “Submitted” notification that may not yield a response; customers are kept in the loop with clear ticket and status updates, plus the ability to message their assigned support agent directly.

The flexibility of BoldDesk has shone through in its support for multiple languages. As a business based in Catalonia, Spain, the ConsultorsBPM team speaks Catalan as its native language. Thanks to the extensive customization possible in BoldDesk, they completely configured the UI of their support portal in Catalan. This allows staff to work comfortably and efficiently in their native language within BoldDesk.

ConsultorsBPM has also used the customization features of BoldDesk to include its corporate imagery in the support portal to maintain a user experience that is consistent with the solutions it builds. With these features, “You realize that the product is not just another ticket management solution,” said Jordi.

Another back-end benefit for ConsultorsBPM has been the reports and analytics built into BoldDesk. Daily, the head of support can see what’s on the support team’s radar in real time —what’s low priority, what’s urgent, and what needs to be addressed tomorrow. The built-in analytics illuminate critical metrics and KPIs about the support the company is delivering,



saving team members from spending hours running reports and compiling information manually.

Conclusion

With BoldDesk, ConsultorsBPM has made organization a pillar of its customer support strategy, which has translated into a responsive, efficient support experience for its clients. The ticket management system is thoroughly flexible, and its price point makes stellar customer support an affordable reality.

Pull Quote:

“It’s a very powerful, integrable, and affordable tool with tons of functionality. If you’re into .NET, for me, it’s the ticket management tool every platform should integrate.” - **Jordi**

Burgas, ConsultorsBPM

