Front.com

B2B Support Team Front Setup Checklist

Welcome to Front, the customer communication hub for support teams. Front combines the automation of ticketing software with the personal touch of email, so your team can handle high volume while going above and beyond.

This checklist will guide you through setting up Front, so you can deliver extraordinary customer service. Need a hand along the way? We've got you covered. Reach out at onboarding@front.com.

STEP 1:

Add your Structural Elements

- [ ] Add your inboxes
  - We recommend organizing inboxes by the group of people handing the messages. For example, add your support@, help@, and contact form to the same inbox for your team to triage all inquiries.
- [ ] Optional: Import your ticketing system data
  - Transitioning from your old ticketing system is easy. Import your information from Help Scout, Zendesk, or Freshdesk directly in your "Plugin Settings."
- [ ] Import your contacts
  - Use the provided CSV template to upload contacts.
  - Tip: Your team can use the Contact Details plugin to see a full timeline of communication with each customer. You can see calls, texts, emails, and more.
- [ ] Import your account information
  - Use the provided CSV template to upload the companies or organizations you work with.
- [ ] Enable relevant integrations
  - Using a help center like Helpdocs or Forumbee, or providing phone support through Aircall or Dialpad? Be sure to enable the integrations your team relies on.

STEP 2:
Build your Support Team Workflow

- [ ] Determine your message triaging with assignments and routing
- [ ] Create tags to track topics like bugs, feature requests, and more
- [ ] Build message templates so your team can quickly reply to common questions
- [ ] Automate your workflows with rules
  - Example: Use the “Rules Library” to assign conversations with load balancing, so your team is never overwhelmed by the work on their plate.
- [ ] Create SLAs for your team to respond to messages on time, every time
- [ ] Create CSAT surveys and signatures to capture customer satisfaction on every interaction with your team
- [ ] Optional: Recreate a ticket number experience

STEP 3:
Invite and Train your team

- [ ] Have your team attend a live Front Training Session
- [ ] Invite your team
- [ ] Share how to go Out of Office
- [ ] Set up shifts for your team