How to Evaluate Customer Support Claims
in Tax Resolution Software
A Due-Diligence Checklist for Tax Professionals

PURPOSE

Tax professionals evaluating resolution software face a crowded market with vendors making similar-sounding claims. This checklist provides a structured, objective framework for evaluating customer support quality across any platform — so you can make an informed decision based on evidence, not marketing.

Use this checklist when comparing vendors, during trial periods, or before contract renewal.

PART 1: Operational Must-Haves (Growth & Efficiency Features)

Check the boxes for features that are absolutely non-negotiable. Every item below should be considered essential when shortlisting platforms.

✓	Criteria	What to Look For	Notes
☐	**Multi-Channel Support**	Support is reachable via at least two channels (e.g., phone, email, live chat, social media, or in-app).	
☐	**Easy Onboarding**	A structured onboarding process is included, not just self-serve documentation.	
☐	**Dedicated Account Contact**	Access to a named, knowledgeable, and experienced support contact or account manager.	
☐	**Transparent Issue Escalation Path**	The vendor clearly outlines how issues are addressed and their resolution process.	
☐	**Support Included in Base Price**	Core support is not paywalled behind a higher-tier plan without explicit disclosure.	
☐	**Public Reviews**	Vendor has verifiable, third-party reviews on platforms such as G2, Capterra, or	

✓	Criteria	What to Look For	Notes
		Trustpilot. Customer service and support are rated positively.	
☐	**Free Training & Education**	Vendor offers complimentary training sessions, onboarding classes, webinars, or continuing education resources at no additional cost to subscribers; covering IRS updates, software features, and tax resolution strategies.	
☐	**Resources Hub**	Vendor maintains an accessible library of support materials, including eBooks, blog articles, videos, webinars and guides relevant to tax resolution workflows.	
☐	**Proactive Account Monitoring**	Vendor monitors software activity and alerts you to anomalies or issues before you report them.	
☐	**Custom Training Sessions**	Live, role-specific training beyond standard onboarding — tailored to your firm's size and case types.	
☐	**Peer User Community**	Access to a moderated community of other tax professionals using the platform to share best practices.	
☐	**Priority Support**	Option to escalate issue resolution to a faster-response lane during critical filing deadlines.	

PART 2: Technical Needs

Verify that the vendor's support infrastructure can handle the technical complexity of tax resolution workflows.

✓	Criteria	What to Look For	Notes
☐	**Setup Support**	The vendor can assist with the technical setup and troubleshooting.	

✓	Criteria	What to Look For	Notes
☐	**Data Security & SOC Compliance**	Support agents follow documented procedures for handling sensitive client tax data (PII, financial records). Vendor holds a current SOC 2 Type II certification, with a report available upon request.	
☐	**Audit Trail for Support Cases**	Support requests and resolutions are logged and accessible for compliance documentation.	
☐	**Software Update Communication**	Vendor proactively notifies users of updates, especially those affecting IRS forms or e-file capabilities.	
☐	**Uptime & Incident Reporting**	Vendor publishes a status page and notifies users of outages within a defined timeframe.	

PART 3: Critical Questions for Every Vendor

Ask these questions to every software provider you evaluate. Request data-backed answers wherever possible — not case studies or testimonials alone.

1. Does Team Size Equal Better Support?	
Ask Vendors:	*"Is your support team in-house or outsourced, and how knowledgeable are they about the platform?"*
My Requirement:	A larger team is not inherently better — ask whether agents specialize in tax workflows or handle general software issues. Confirm whether support is in-house or outsourced to a third-party call center.

2. What Is the Average Resolution Time?	
Ask Vendors:	*"What is your average first-response time and average resolution time, broken down by issue type (billing, technical, compliance-related)?"*
My Requirement:	First-response should be under 4 business hours for email requests; under 60 minutes for live chat or phone. The total resolution time should be under 48 hours

	for standard issues. Ask for data from the prior two quarters — not best-case scenarios.

3. How Many Requests Per User?	
Ask Vendors:	*"What is the average number of support requests per user per month, and how has that figure trended over the past year?"*
My Requirement:	Lower support request levels may suggest a stable, intuitive platform. Increasing volumes may indicate product instability or gaps in documentation. An average above **1 request per user per month** warrants a deeper investigation into root causes.

4. What Percentage of Issues Require Escalation?	
Ask Vendors:	*"What percentage of issue/error reports are escalated to a second or third tier, and what is the resolution time for escalated cases?"*
My Requirement:	An escalation rate below 15% suggests front-line agents are well-trained. High escalation rates (25%+) may signal inadequate agent expertise or a complex, bug-prone product. Ask who handles escalations — internal engineers or a third-party vendor.

5. Are Reviews Consistent Across Sources?	
Ask Vendors:	*"Can you point us to third-party review platforms where your support is evaluated, and how do you respond to negative support reviews?"*
My Requirement:	Look for consistent ratings (3.8+) across G2, Capterra, and Trustpilot — not just curated testimonials on the vendor's own site. Check review dates: a spike in negative reviews in recent months can indicate a regression in service quality. Validate that reviewers speak positively of their customer service experience, onboarding, and learning the system.

6. What Type of Support Is Provided?	
Ask Vendors:	*"What support channels are available, which are included in our plan, and what are the operating hours for each?"*

My Requirement:	Differentiate between reactive support (waiting for you to report an issue) and proactive support (where the vendor monitors the system and alerts you). Confirm whether phone support is live or routed to a callback queue. Self-service resources should supplement — not replace — live support.

7. What Are the True Costs of Support?	
Ask Vendors:	*"Are there any support tiers, add-on fees, or usage limits that could affect our access to full support services?"*
My Requirement:	Identify any separate charges for priority support, onboarding, or dedicated account management. Understand what is included in your quoted price versus what requires an upgrade. Ask whether pricing changes upon renewal — particularly after introductory periods.

This checklist is intended for informational and educational purposes. Requirements will vary by firm size, case volume, and software complexity. Update this document as your firm's needs evolve.