

Customer Support Platform Decision Brief

Prepared as a demonstration case study using a fictional client scenario and real public vendor research.

EXECUTIVE RECOMMENDATION

Recommend Help Scout Standard + Twilio. It best satisfies Apex's hard requirements while preserving the largest budget cushion.

- Keeps the existing local 10-digit dispatch number through a Twilio port, subject to portability approval.
- Brings SMS conversations into the Help Scout Inbox alongside email.
- Supports First Response Time reporting and issue-volume reporting through tags/report views.
- Models at about \$277/month at 5,000 SMS segments on monthly Help Scout billing, before taxes.
- Still models at about \$343.50/month in a 10,000-segment stress test, before taxes.
- Annual Help Scout prepayment lowers the 5,000-segment monthly equivalent to about \$245.

Budget discipline: These are planning estimates, not a guaranteed invoice. Twilio carrier fees, message segmentation, taxes, and the final A2P registration path can change the actual total. Written vendor quotes should control the purchase decision.

CLIENT CONSTRAINTS

Requirement	Apex requirement
Team	8 full agent accounts: 6 dispatchers + 2 managers
Hard budget	Maximum \$400/month all-in; annual prepay acceptable if <= \$4,800/year
Day-one channels	Email + SMS in the same support workspace
Phone number	Must keep the existing local 10-digit dispatch number
SMS volume	~4,000-5,000 total messages in a busy month; 5,000 used as planning case
Reporting	First Response Time + volume by issue type
TMS	No integration required; manual tracking-number copy/paste is acceptable
History	Start fresh; keep old Gmail as read-only archive

Cost & Vendor Decision

CFO COST VIEW					
Scenario	Seat base	SMS + fees	Recurring/mo	Stress @10k	Status
Help Scout Standard - monthly	\$200.00	\$77.00	\$277.00	\$343.50	RECOMMEND
Help Scout Standard - annual prepay equiv.	\$168.00	\$77.00	\$245.00	\$311.50	BEST CASH EFFICIENCY
Help Scout Plus - annual prepay equiv.	\$302.40	\$77.00	\$379.40	\$445.90	TOO TIGHT
Freshdesk Omni Growth - annual	\$232.00	\$77.00	\$309.00	\$375.50	ALTERNATE
Freshdesk Omni Growth - monthly	\$280.00	\$77.00	\$357.00	\$423.50	STRESS FAIL
Zendesk Support Team + Text	\$152.00	Quote needed	Quote needed	Quote needed	CONDITIONAL
Zendesk Suite Team	\$440.00	Before SMS	\$440+	\$440+	FAIL
Intercom Essential	\$232.00	N/A	N/A	N/A	DISQUALIFIED

Model inputs: 5,000 expected SMS segments, 10,000-segment stress test, Twilio base SMS rate \$0.0083/segment, \$0.005/segment carrier-fee allowance, \$0.50/month BYON number, \$10/month conservative 10DLC campaign allowance, and \$61 one-time registration allowance.

VENDOR VERDICT	
Help Scout Standard RECOMMEND	Strongest overall fit. Simple shared-inbox workflow, direct Twilio SMS connection, reporting that matches Apex's weekly metrics, and the widest budget margin.
Freshdesk Omni Growth ALTERNATE	Viable fallback with a more dedicated SMS channel/routing experience. Annual billing stays under the cap even at the 10k stress case, but with less cushion and somewhat more system complexity.
Zendesk Support Team + Text CONDITIONAL	Base license is inexpensive and an existing SMS-capable number may be portable, but the all-in Text cost cannot be responsibly modeled without the inbound/outbound usage mix and final carrier rate assumptions.
Zendesk Suite Team FAIL	Eight seats cost \$440/month on annual billing before SMS, so it violates the hard \$400 ceiling.
Intercom Essential DISQUALIFIED	U.S. SMS supports toll-free numbers. Apex must retain its existing local 10-digit dispatch number, so Intercom fails a day-one hard requirement.

Decision Logic & Rollout

WEIGHTED FINALIST SCORE			
Criterion	Weight	Help Scout Standard	Freshdesk Omni Growth
All-in cost / budget cushion	30%	5	4
Local SMS + email workflow	25%	4	5
Ease for nontechnical dispatch	20%	5	3
Reporting fit	15%	4	4
Implementation risk	10%	4	3
Weighted score	100%	4.50	3.95

Scoring is a decision aid, not a scientific measurement. Hard requirements were screened first. Freshdesk receives the higher SMS-workflow score because its dedicated SMS channel supports group routing inside the unified inbox; Help Scout wins on cost cushion and simplicity.

30-DAY ROLLOUT TARGET			
Phase	Work	Dependency / risk	Success check
Week 1	Create Help Scout/Twilio accounts; confirm number portability; submit port; start A2P brand/campaign registration; define `missing-cargo` and `routine-dispatch` tags.	Porting and A2P approval are external critical-path items.	Port accepted; A2P submitted; test inbox and categories configured.
Week 2	Use a temporary Twilio test number; connect SMS to Help Scout; configure assignments/workflows; train dispatchers on ownership, notes, tags, and collision prevention.	Do not cut the production number early.	Email + test SMS appear in the Inbox; agents can assign and reply.
Week 3	Pilot the workflow; test first-response reporting and tag-filtered volume reports; refine saved replies/workflows.	Data quality depends on consistent tagging.	Managers can produce the two required weekly views.
Week 4	Cut over only after port completes and A2P is approved/active. Keep Gmail read-only. Monitor SMS delivery/routing through stabilization.	Local SMS routing can take up to ~3 business days after port; ports can exceed 30 days if rejected/delayed.	Production SMS stable; no duplicate replies; reporting works; old Gmail remains accessible.

Schedule caution: 30 days is a target, not a guarantee. Twilio states standard U.S. ports usually take 5-15 days but can take 4 weeks or longer. Apex should preserve its current service until the port and A2P requirements are complete.

Purchase Checklist, Assumptions & Sources

BEFORE PURCHASE

- Get a written Help Scout quote for 8 Standard users showing monthly billing and annual-prepay cash requirement.
- Confirm that Help Scout's SMS connection adds no required Help Scout channel fee beyond the chosen plan and Twilio charges.
- Confirm the existing dispatch number is portable to Twilio and clarify whether voice service must move or can remain with the current provider.
- Confirm the exact A2P 10DLC brand/campaign type, one-time registration fees, recurring campaign fee, and carrier fees.
- If considering Zendesk Support Team + Text, obtain a usage estimate based on Apex's actual inbound/outbound segment mix.
- Confirm taxes and any contract terms before CFO approval.

KEY ASSUMPTIONS

- SMS planning uses billable segments, not human-visible message count. Long texts, emojis, or non-GSM characters can create multiple segments.
- The \$0.005/segment carrier-fee amount is a conservative allowance, not a quoted universal carrier rate.
- The \$10/month A2P recurring allowance and \$61 one-time allowance intentionally model a conservative standard registration path; lower-volume registration may cost less depending on Apex's exact business/use case.
- Taxes are excluded because the billing address and tax treatment are not known.
- Paid AI usage is not required for day-one operations and is excluded from the recommended baseline.

PRIMARY SOURCES

Source	URL
Help Scout pricing	https://www.helpscout.com/pricing/
Help Scout annual payments	https://docs.helpscout.com/article/1421-about-annual-payments
Help Scout SMS + Twilio	https://docs.helpscout.com/article/1776-connect-sms-to-help-scout-to-send-and-receive-messages
Help Scout reporting	https://docs.helpscout.com/article/380-email
Freshdesk Omni pricing	https://www.freshworks.com/freshdesk/omni/pricing/
Freshdesk SMS channel	https://support.freshdesk.com/support/solutions/articles/50000012692-connect-sms-channel-to-freshdesk
Twilio U.S. SMS pricing	https://www.twilio.com/en-us/sms/pricing/us
Twilio A2P fees	https://help.twilio.com/articles/1260803965530-What-pricing-and-fees-are-associated-with-the-A2P-10DLC-service-
Twilio U.S. porting	https://www.twilio.com/en-us/guidelines/us/porting
Zendesk pricing	https://www.zendesk.com/pricing/
Zendesk Text pricing	https://support.zendesk.com/hc/en-us/articles/4408843672346-Zendesk-Text-number-availability-and-pricing
Intercom U.S. SMS number types	https://www.intercom.com/help/en/articles/6311204-country-and-phone-number-management-for-sms

Bottom line: Help Scout Standard is the preferred first purchase, subject to final written quotes and successful number-port/A2P confirmation. Freshdesk Omni Growth is the strongest fallback.