Buyers Guide

Selecting a Customer Success Platform

How to evaluate, choose, and internally sell a CSP for your scaling business.

Contents

"If we don't give Customer Success teams all the tools they need to actually go ahead and help customers, the whole idea behind having a Success team is just moot."

Syed Asad, VP of Sales & Success at Hubstaff

Congrats!

Congrats?

Yes, congratulations on taking the first important step in bettering Customer Success for your organization.

With this guide, we'll walk you through the evaluation process for choosing a Customer Success Platform (CSP) that best fits the needs of not only your team and business, but also the customers that experience your product.

Ready to get started? Let's get to it!

Why do I need a Customer Success Platform?

Probably the most important question in the evaluation process of any tool is 'why do I need this?' It's fair to ask, and before any sort of investment is made by you and your team, you should think through and understand exactly what you're solving for.

For Customer Success, a common place to start is **how do we access customer data** and **how do we execute on these insights?**

For the former, your team likely has many tools already in place. Your sales teams may use a CRM like **Salesforce** and **HubSpot**, while your support teams have ticketing software such as **Zendesk** and **Intercom**. Additionally, product usage may be hosted within platforms like **Mixpanel** or **Segment,** or maybe even within a large data warehouse such as **Snowflake** or **BigQuery**. And when it comes to your revenue data, tools like **Stripe** and **Chargbee** make it quick and easy to process and securely store payment data.

But CS teams need a lot (if not all) of this data, and executing on it becomes even messier, typically involving manually updated spreadsheets for tracking updates and critical customer KPIs.

If a lot of this sounds familiar, then you likely already have a need for a Customer Success Platform.

With a CSP, you'll discover how to bring all your data and operations under a single pane of glass, as well as how to empower your team to manage their book of business at scale.

The Big Page of Questions

So you're looking for a Customer Success Platform but don't know what to ask? From onboarding and implementation to renewal, we've got you covered with the right questions to proactively ask in your upcoming vendor calls.

Platform Questions

- What would you consider the most powerful aspect of your platform?
- What's the ROI my organization can expect from your platform?
- How does your platform handle and measure my organization's unique success metrics?

Integration Questions

- What integrations does your platform support?
- What is the quality of each key integration? Are they bi-directional? Real-time?
- How do you solve for customer data I have that isn't supported with an integration?

Onboarding & Implementation Questions

- What does the onboarding and implementation experience look like?
- What internal or external resources will be needed for set up and maintenance?
- What resources are offered to my team to improve their adoption and use of the platform?

Pricing Questions

- What does pricing look like? Does it include all the features and capabilities I need today and as we grow?
- How does pricing scale with my needs over time? Will pricing change year-over-year whether or not my business needs change?
- Are there additional costs/charges for implementation, onboarding, quarterly business reviews, and/or support?

Business-Case Questions

- What will choosing your platform mean for my team and our business?
- How can I present value in the tool and Customer Success back to the business?
- What other teams will find value in your platform?

Part I

Customer Success Platform Readiness

In this section, we'll help you understand your needs for Customer Success and how to decide if you're ready for a Customer Success Platform.

So when is the right time to invest in a Customer Success Platform?

While there are many factors in deciding the right time to invest in a Customer Success Platform (i.e. team makeup, goals, budgets), generally speaking, as soon as you start to have revenue-generating customers, you should be considering a Customer Success Platform.

But does that mean you need a Customer Success team in place? Not necessarily. Customer Success is not just a business function, but also an approach for keeping customers on-track, satisfied with your product, and working towards retention. With a CSP, your team will be prepared to monitor, manage, and prepare your customers for the journey ahead.

Additionally, a CSP will help your team deliver a better experience to your customers. From onboarding and product adoption, to proactive monitoring to avoid churn, the right tool can help you and your team achieve the experiences that build customer loyalty and retention from day one.

If you are generating revenue that you want to convert into recurring revenue, it may be ideal to start considering a CSP as soon as possible. On the next page, you'll find a rubric to help you determine when your organization is ready for a CSP.

65% of respondents say designing and building Customer Success processes and workflows is one of their top priorities when it comes to the digital transformation of Customer Success.

Gartner Peer Insights.

Customer Success Platform Readiness Rubric

Use the rubric below to determine your teams readiness for evaluating a CSP.

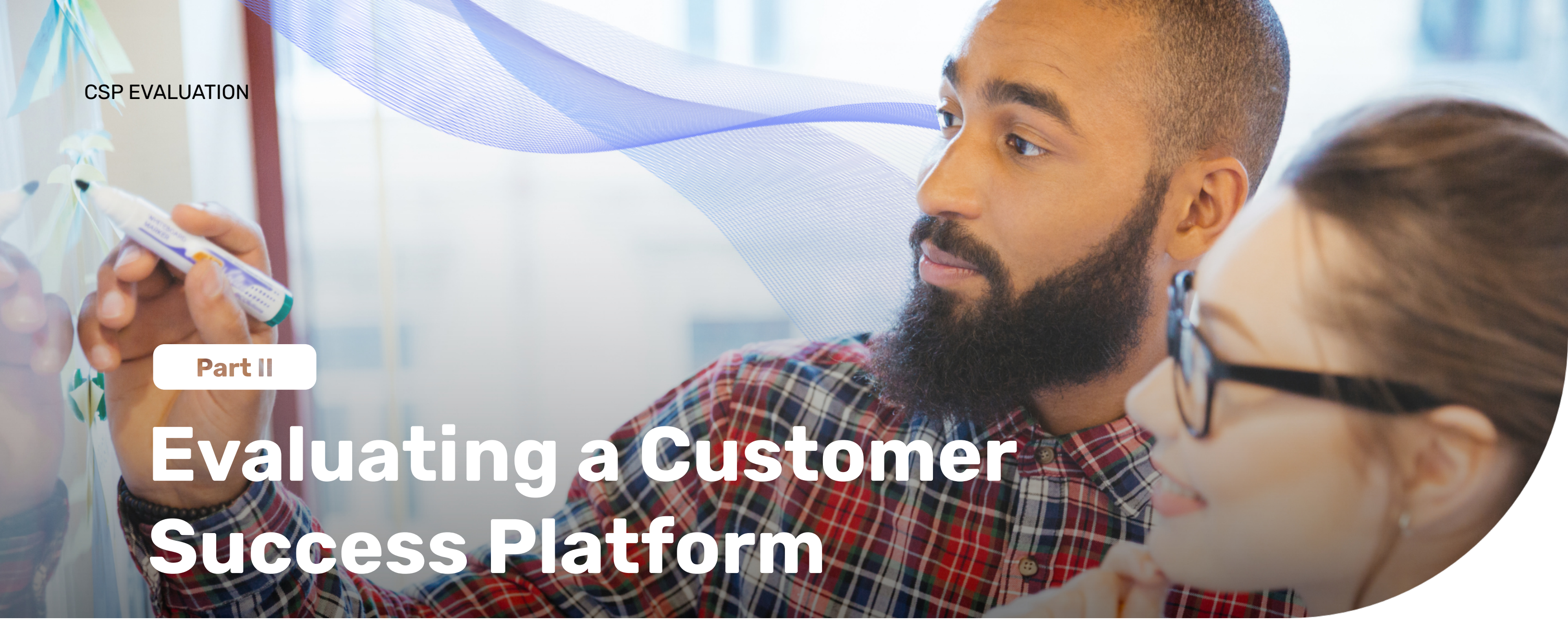
Category	1	2	3	4
What does your team look like?	No Customer Success Team, Founder/Sales Led Success	Dedicated Customer Success Managers	Customer Success team (CSMs, Implementation)	VP-led Customer Success organization
What's in your tech stack?	• Support	• Support • CRM	• Support • CRM • Revenue data	• Support • CRM • Revenue data • Product usage
How much access do you have to customer data?	Full access without dependency on other departments	Some access, rarely depend on other departments	Limited access, often depend on other departments	No access, completely dependent on other departments
Are your CS workflows automated?	We rarely need to do any manual processes	Somewhat automated, but not efficient	Very few, basic automations	Are CS processes are entirely manual
How well can you detect customer churn?	We're proactive and can prevent churn easily	We're somewhat proactive but few issues slip by	We're somewhat reactive but quick enough	We're reactive and often it's too late
Total	__ / 20 points			

Understanding Your Results

Score: 4-8 points
Early Stage
You are just getting started with Customer Success and can likely wait until your business matures more. However, a CSP may still provide you with the results you need today and into the near future.

Score: 9-12 points
Scale Stage
Your Customer Success team is maturing while also running into greater customer data needs. A CSP will help your team stay organized and informed on what is happening across their book of business.

Score: 13-20 points
Growth Stage
Evaluating a CSP should be a high priority for your Customer Success organization. As your team and business scale, it will only become more difficult to stay on track, protect revenue, and drive business value.



Part II

Evaluating a Customer Success Platform

In this section, we'll walk you through how to properly evaluate a Customer Success Platform, including what to prioritize, look for, and ask from vendors.

A Customer Success Platform is going to be a critical part of your company's tech stack. As a Customer Success team, you are tasked with a myriad of responsibilities, so choosing the right tool is imperative to the continued growth and health of your business.

For that reason, understanding and establishing what success looks like for your business is the most important place to start. These can include a wide range of factors, but some you may be thinking about are:

- Customer time to value (i.e. onboarding success)
- Product adoption and usage
- Churn prevention
- Upselling and revenue growth
- NPS, CSAT, and other surveys

As you go through your evaluation, it is important to keep these factors top-of-mind. Additionally, you'll want to think about how current processes block your team from reaching these goals, and how a CSP could improve them with tools like automation.

Only **8%** of respondents describe their current Customer Success processes as robust, repeatable, measurable, and automated.

Gartner Peer Insights

What to Evaluate in a Customer Success Platform

Whether you're buying a CSP for the first time or already have one in place, below we'll help you understand what to evaluate in a Customer Success tool.

The Core Functions of (Most) Customer Success Platforms

As you begin to evaluate CSPs, there are five key areas that you should be considering with each tool. These include:

Data & Integrations	Project Management	Automation	Reporting & Analytics	Customer Health
Does the CSP support the critical customer data tools in our tech stack?	How will I manage my team and how will my team manage their customers?	What can I automate and how will that improve revenue, churn, and team performance	How will a CSP help me monitor trends, create reports and prove value in our investment?	Will the CSP give me increased visibility into my customers and how they're doing?

Each of these key areas are critical to determine the capabilities and functionality of a CSP. Let's dive into each and questions you should be thinking and asking vendors when looking into their product.

Data & Integrations

In order to get customer data into a CSP, they will either need to have pre-built integrations or other methods (APIs, manual data pulls) of getting data out of one platform and into your Customer Success experience.

When it comes to integrations, not all are made equal. That includes the same integration offered across various CSPs. For that reason, it's critical to get an understanding of what each integration is and what it is capable of.

Discover all the tools Vitally integrates with:

Visit Vitally.io/integrations

Questions to Ask Yourself

- What tools does my CS team use or need access to?
- Who currently has access to these tools? Will I need to include my broader team?
- How often do I need customer data to be updated in the platform?

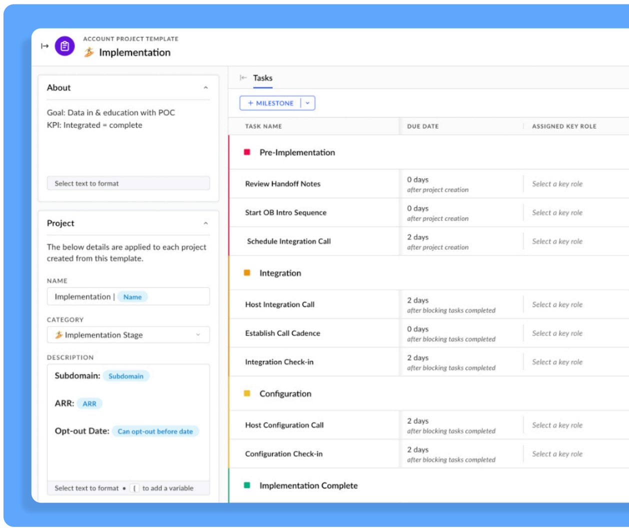
Questions to Ask the CSP

- What is the quality of each integration? Are they bi-directional? Secure?
- How easy is it to setup each product integration?
- How will you handle data for my tools that don't have integrations?

Project Management

A Customer Success Platform should feel like a centralized location for your CS team. When evaluating a CSP, you should be looking for tools that enable project management solutions for your team.

With a powerful project management tool, you'll be able to deliver consistent customer experiences while also keeping your team and customers on track with various tasks and projects.



Questions to Ask Yourself

- Does my team follow the same steps with projects such as onboarding and QBRs?
- How do I currently track the progress of ongoing projects?
- Do my projects align with real-time customer experiences (such as churn risks)?

Questions to Ask the CSP

- Can I create templates for specific projects such as onboarding, QBRs, etc.?
- How do I know if a project is off-track? What can be done to right the ship?
- Can projects be created using automation based on real-time customer activity?

Automation

One of the most significant benefits a Customer Success Platform can have on your business and organization is in its ability to automate workflows. With a powerful automation tool, your team can reduce time spent on redundant, repeatable tasks while also enabling your team to become more efficient.

A modern automation solution should be able to handle virtually any repeatable task or process, while also accounting for various different scenarios.

See the latest in CS Automation:

Questions to Ask Yourself

- How much time does my team spend on tasks that could be done automatically?
- What is the process and time spent for my team to identify changes in trends?
- How do we handle and process changes in account data across our book of business?

Questions to Ask the CSP

- What parts of my customer data and the platform can be automated?
- How many levels of automation can be built into your platform?
- How does your platform handle situations where customer data doesn't fit the automation?

Reporting & Analytics

While evaluating CSPs, it's important to understand how each platform processes and outputs data. This not only includes customer data from various tools and integrations, but also tracking success metrics and day-to-day activities happening within your CSP.

Choosing the right tool will not only provide valuable insights on your customers, but will also enable you and your team to showcase the value of Customer Success back to the organization.

Questions to Ask Yourself

- Does my team currently have a 360° view of their customers?
- How much time is spent on manually pulling data and creating reports?
- How do I ensure my organization understands the value Customer Success is driving?

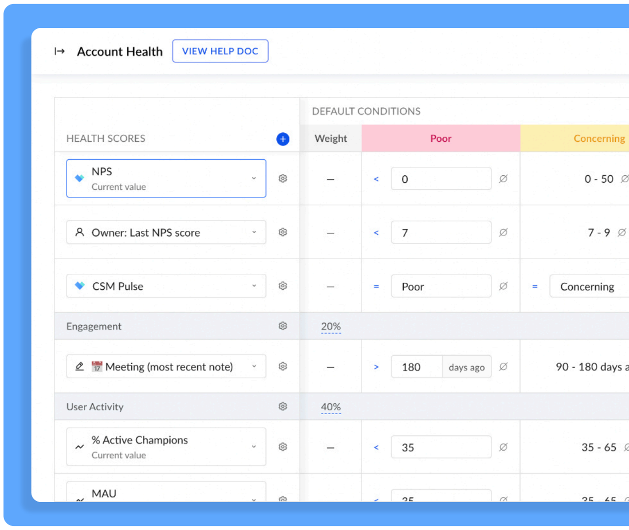
Questions to Ask the CSP

- How are reports built in your platform and how flexible are they?
- What types of reports are included and built-in for my team to use immediately?
- Can I create success metrics tailored to my business and report against them?

Customer Health

With the emergence of Customer Success Platforms, more and more teams are gravitating towards formulating health scores to help understand and visualize the health of their customers.

When evaluating customer health solutions, it's critical for your team to establish early on what indicates a healthy customer. From there, you can properly determine which platforms will unlock the health grading that can further prevent churn or other real-time issues.



Questions to Ask Yourself

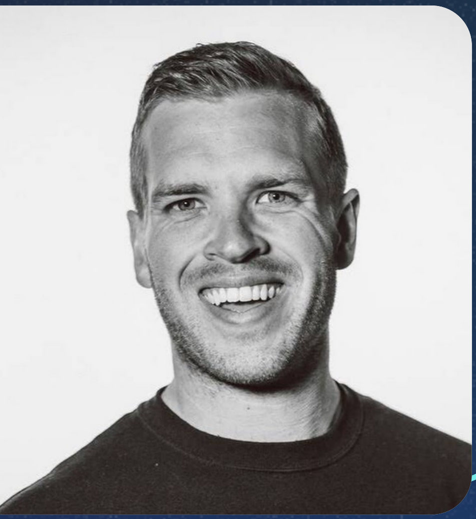
- Right now, could my team accurately pin-point the health of each customer?
- What factors would need to go into our ideal customer health score?
- What types of actions would I expect my team to make with customer health score data?

Questions to Ask the CSP

- What pieces of customer data can I use for a health score and how dynamic is it?
- Are health scores measured only at the account level or also for the organization?
- Can I build health scores for each customer segment or stage of the customer journey?

Jared McCoskey, Director of Customer Success at CompanyCam

On the Value of Customer Health Scores



"We were guessing which accounts needed our time, and we were spending a lot of time in places that we didn't need to spend our time."

"So to get a feel for the health of an account, we were going based off of gut in a lot of ways, and waiting for something to happen before we would act on it."

Learn how Jared and team solved for customer health:

Natalie Onions, VP of Customers at Customer.io

On the Importance of Unifying Customer Data

"We came from a place of trying to piecemeal a bunch of other tools together—that were made for different capabilities on different teams—and make them work for Customer Success."

"Using a lot of different tools in a lot of different places was very overwhelming, not to mention a big time suck."

See how Natalie and team saved time unifying data:

Part III

Choosing a Customer Success Partner

Now that you know what to look for in a Customer Success Platform, this section is designed to help you choose the right partner for your needs.

Choosing any tool is an investment. More importantly, it's a bet you're making on yourself and your resources to bring value to your organization. For that reason, choosing the right platform is perhaps one of the most important decisions you'll be making as a leader in Customer Success.

In the previous section, we went over the key factors of a Customer Success Platform that you should be using as part of your evaluation. Each of these factors should give you an idea of what's most important to you and your team, as well as what value a selected tool can provide back to your organization.

Beyond features and capabilities, the other factor you should also be considering in your decision process is picking the right Customer Success Partner.

Your Customer Success Partner can come in many different forms, including as a Customer Success Manager, Implementation Specialist, Account Executive, and even the vendor itself.

Each person you interact with will be a companion of yours as you implement, roll-out, and deliver with your chosen Customer Success Platform. Selecting the right partner can be just as important as the platform itself.

"As a CSM, you're the subject matter expert on your product for customers. Yes, that means knowing your product inside and out and being able to answer questions.

But what a great CSM does is go beyond that kind of tactical step-by-step implementation, problem solving, question-answering into the strategic narrative."

Sarah Cunningham-Scharf
Head of Customer Success
at Great Question

Your Partners in Success

As a Customer Success team, you have the distinct advantage of already knowing the types of people you'll be working with. In fact, you probably have a few similar roles already on your team.

The Account Executive

Your Account Executive (AE) will likely be the first person you interact with on your journey. They will conduct everything from discovering your pain points and demoing the product for you to presenting pricing. During your discussions, it's important to make sure your AE is hearing your pains and explaining how the platform will address them.

Account Executive Checklist

- [ ] My AE has addressed all the pain points of our current Customer Success process.
- [ ] My AE has fully demoed all the parts of the product that we would use.
- [ ] My AE has explained pricing, what my plan will include, and how it looks with scale.

The Implementation Specialist

Once you've selected a platform, you will begin onboarding and implementation. While in some scenarios this will be handled by a Customer Success Manager, you may want to consider vendors that offer a dedicated Implementation Specialist/Partner. While CSMs are subject-matter-experts in the product, setting up your CSP will require some technical steps which are best suited for someone that is an expert in such matters.

Implementation Specialist Checklist

- [ ] The Implementation Specialist will be available until my team is fully implemented into the product.
- [ ] The Implementation Specialist will be help our team through calls/meetings, not just email and chats.

The Customer Success Manager

Depending on the product you choose, you may have a dedicated Customer Success Manager (CSM) or sometimes it may be pooled across various CSMs. As a Customer Success organization, you know just how vital a CSM can be to the overall success from adoption through renewal. When evaluating partners, its important to understand how much access and guidance you'll receive from your CSM.

Customer Success Manager Checklist

- [ ] My CSM will be available to address my concerns and help drive towards success metrics.
- [ ] My CSM will conduct business reviews with me and my team on a quarterly/annual basis.
- [ ] The vendor offers a CSM resource that fits the needs of my business.

Part IV

Selling Your Team on a Customer Success Platform

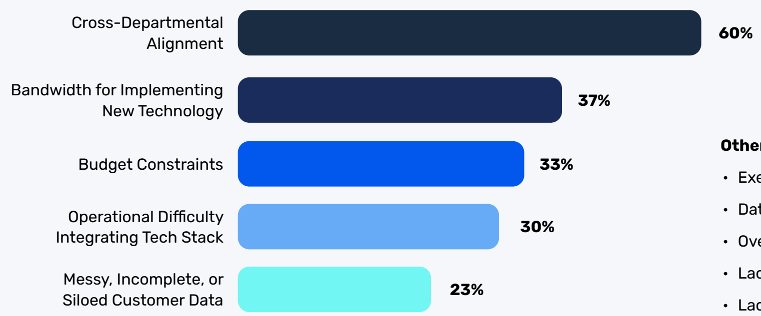
You've selected the Customer Success Platform that's best for your team. Now the only thing that stands in your way is getting final approval.

It's been weeks, maybe months, and you finally have concluded all your meetings, demos, trials, and maybe a few RFPs. You've done all your research, and you're ready to hit go on the tool you're super excited about. However, there's still one major hurdle—getting approval from stakeholders.

Whether it's executives, cross-functional leaders, technical teams, or simply just those who control the budgets, going through an approval process can be a dreaded task for many. In some cases it'll be smooth, while in other situations it could push back your rollout for an unforeseen amount of time. For that reason, it's important to be prepared to handle each stakeholder to address the aspects of your decision that they'll care about.

Gartner Peer Insights.

What are the 3 biggest barriers to Customer Success' digital transformation at your organization?



Other Results:

- Executive/senior leadership buy-in 17%
- Data security or privacy concerns 16%
- Over-reliance on legacy technology 11%
- Lack of central coordination/ownership 10%
- Lack of formal strategy 7%

Preparing For Your Stakeholders

The table below helps breakdown how to approach and include various stakeholders throughout the purchasing process.

	Executives	Budget Owners	Cross-Functional Teams	Technical Resources
What they care most about	The impact the tool will have on the business (i.e. growth/optics)	How much the tool will cost, why it's actually needed, and what's the ROI	How will it impact the way their team operates or interacts with your team	The dependency on their time to support the tool and the impact it can have on data/security
What to prepare for them	A business case for how the tool will improve key business metrics	An overview of the costs of the platform against the costs and losses today	A demo/overview of the product and the value it'll add to their team	A breakdown of what will be asked of them and required going forward
When to include them in the process?	At the end, typically only necessary if you need buy-in or they want involvement	From the very beginning – it's critical to know your budget from the start	As soon as you understand the impact of the tool on their functions	During a technical validation with the vendor

Key strategies for getting approval

Create Alliances

One of the smartest tactics you can take to get buy-in for your platform is to get other cross-functional stakeholders onboard. Taking the additional time to share the value in the tool you're choosing and what it'll mean for yourself and their respective department can help in displaying the benefits of funding your platform.

Show Your Research

While you likely have a platform in mind, most stakeholders want to see that you've done your research. From features to pricing, it's critical that you are prepared to speak to why you've chosen what you have. You can leverage many of the questions from within this buyers guide to display how each vendor has answered critical questions.

Establish Your Budget

Before you fall in-love with a tool, make sure you understand the budget you're working with. Since you'll be exploring a new platform for your business, your revenue team may task you with first getting a feel for the market and what pricing looks like. Once you have an idea of what your allocated budget is, you should share this range with vendors so there is a mutual understanding to what can realistically make a deal happen.

Conclusion

You made it!

We hope this Buyers Guide will make it easier for you and your team to properly evaluate and choose the Customer Success Platform that best meets the needs of your organization and business.

This is just the beginning for your journey in improving Customer Success for your team, business, and most importantly, the customers you support and serve.

If you have any questions about the topics we've covered here, please don't hesitate to reach out to hello@vitally.io. We're always happy to help and share our thoughts around best practices and the future of Customer Success.

About Vitally

Vitally helps Customer Success teams of every size deliver world-class customer experiences, meet unexpected challenges, operate more efficiently, and grow their business's bottom line.

Unify all your customer-facing data across your tech stack with bi-directional, real-time integrations. Easily analyze account and user status, including Health Scores for every customer segment and lifecycle. Standardize Customer Success process with project management tailor-made for CS. Scale operations with automated Notifications and Playbooks. Surface Customer Success wins with beautiful, actionable Reports and Dashboards.

The fastest-growing B2B SaaS companies use Vitally to proactively address churn risks and expansion opportunities in real-time.

Visit **vitally.io/demo-request** to schedule a personal demo and see for yourself why more industry leaders are switching to Vitally.