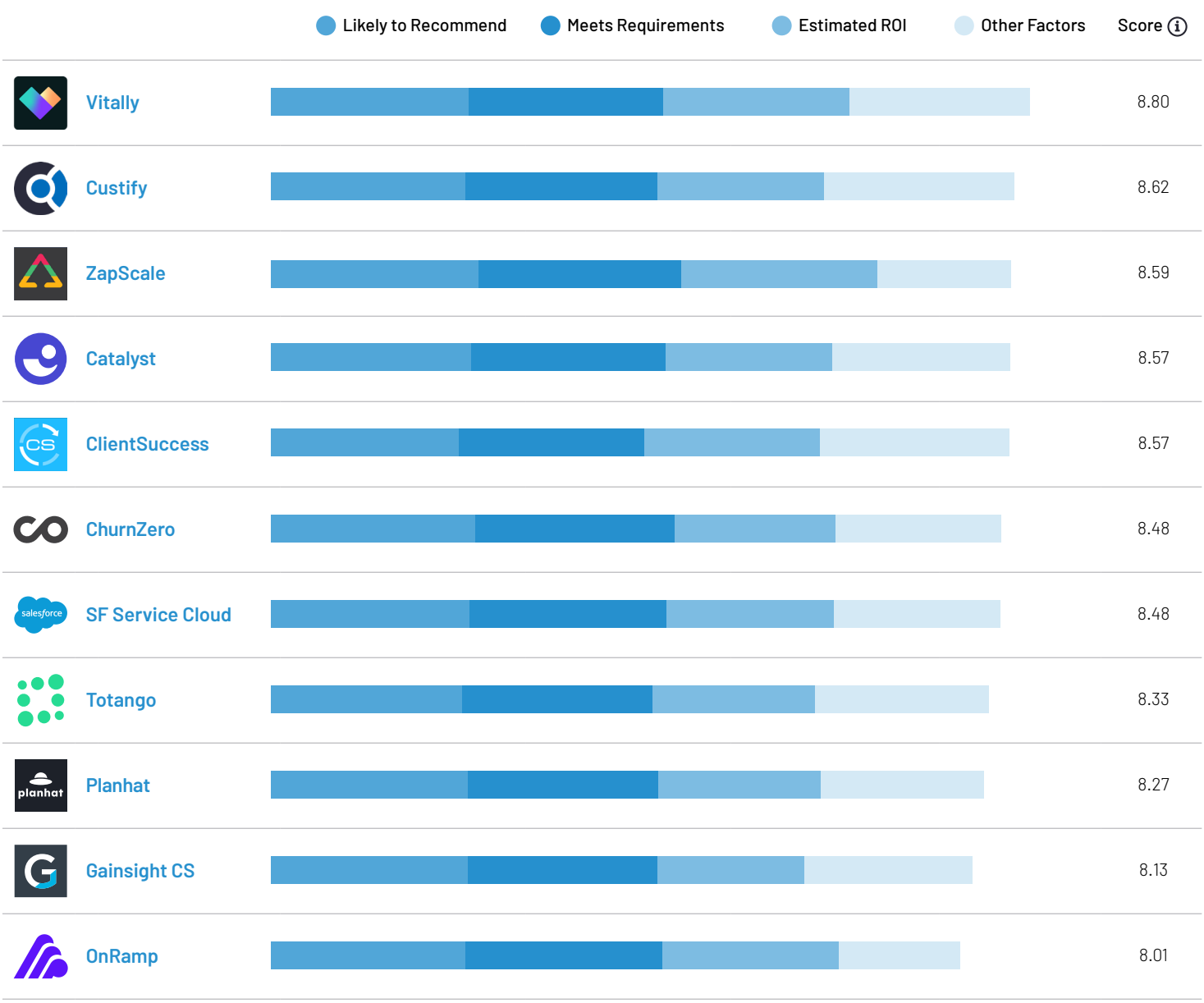
Customer Success Results Index

Results scores for customer success are shown below. The chart highlights some of the factors which contribute to a product's overall Results score. Estimated return on investment, meets requirements, user adoption and likelihood to recommend data is shown in the table below.



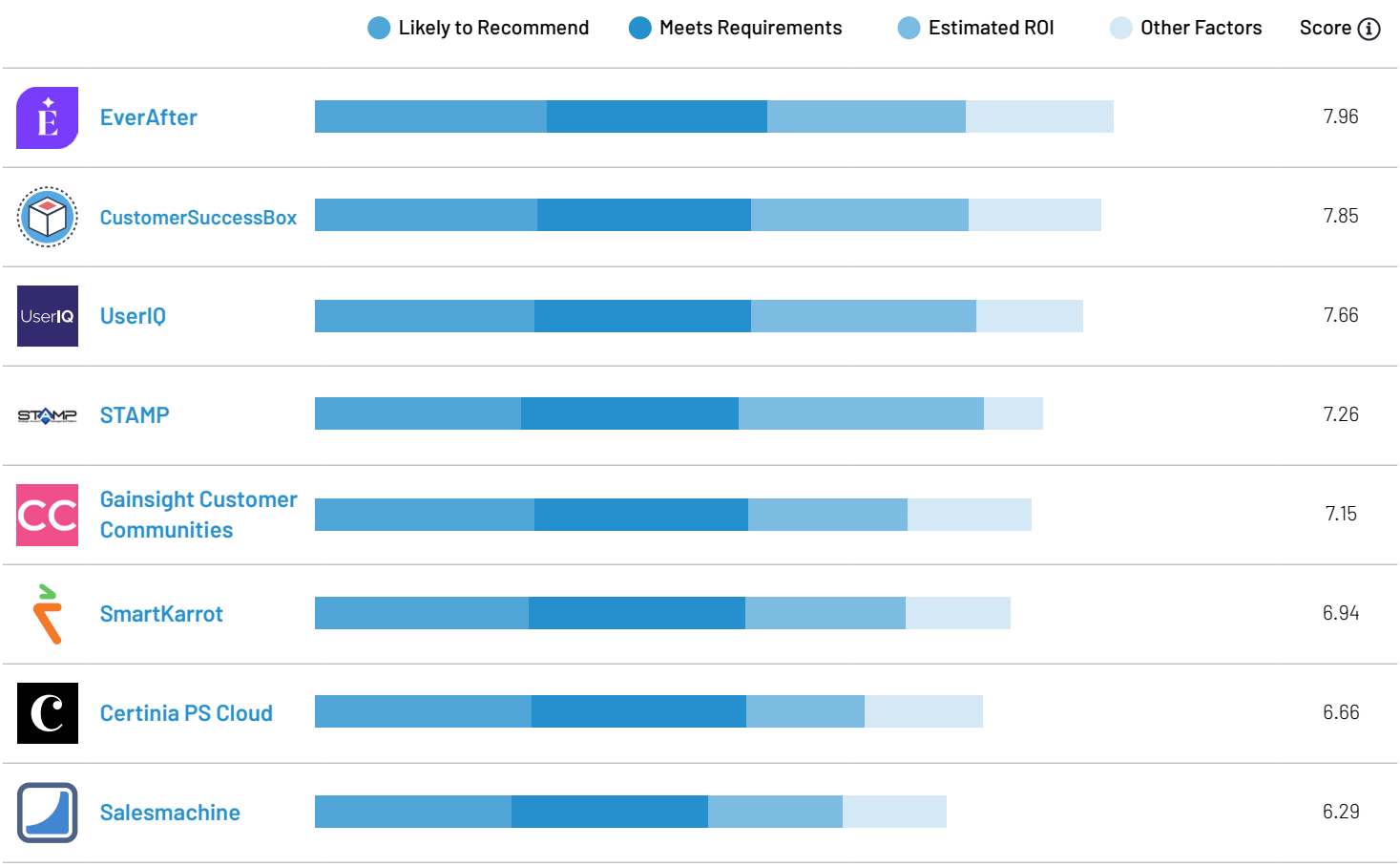
(Customer Success Results Index continues on next page)

* Products are ordered by Index score. Products are ordered alphabetically if two or more products have the same Index score.

© 2023 G2, Inc. All rights reserved. No part of this publication may be reproduced or distributed in any form without G2's prior written permission. While the information in this report has been obtained from sources believed to be reliable, G2 disclaims all warranties as to the accuracy, completeness, or adequacy of such information and shall have no liability for errors, omissions, or inadequacies in such information.

Customer Success Results Index (continued)

Results scores for customer success are shown below. The chart highlights some of the factors which contribute to a product's overall Results score. Estimated return on investment, meets requirements, user adoption and likelihood to recommend data is shown in the table below.



(Customer Success Results Index continues on next page)

* Products are ordered by Index score. Products are ordered alphabetically if two or more products have the same Index score.

© 2023 G2, Inc. All rights reserved.

Customer Success Results Index (continued)

Customer Success Market Definition

Customer success software is used by businesses to ensure that customers achieve the outcome that enterprises anticipate them to reach through interactions with the company as they use the product. Using this platform to track customer behavior, preferences, and usage patterns, agents can coordinate their success planning with greater accuracy and prevent the likelihood of churn. This software uses detailed analysis of past behavior to create a "health score" to predict a customer's future satisfaction. This allows companies to systematically grow an established customer base, identify any red flags, and increase customer retention rates.

These products are used by customer success and sales teams as off-the-shelf solutions to optimize customer relationships. Customer success initiatives are vital to preserving and expanding revenue, boosting customer advocacy, and sustaining corporate profitability and growth. Customer success software often integrates with CRM software, help desk software, and social media management software.

To qualify for inclusion in the Customer Success category, a product must:

- Build or identify customer profiles
- Capture customer data, history, and feedback, including survey results, renewals, invoicing, product usage, sentiment, and team interactions
- Facilitate engagement with customers throughout the customer lifecycle
- Provide feedback, customer success scores, and success reports based on the analysis of historical data
- Automate workflow processes like communications, alerts, coordinating engagements, analyses, success planning, and reporting
- Predict future customer growth, red flags, and trends as dashboards or graphs using data related to interactions, payments, inquiries, and more
- Scale, according to the size of the company and method of customer adoption or engagement

Results Index Description

A product's Results score is calculated by a proprietary algorithm that factors in real-user satisfaction ratings for a number of results-related review questions. Software buyers can compare products in the Customer Success category according to their Results scores to streamline the buying process and quickly identify the products that produce the best results based on the experiences of their peers. For sellers, media, investors, and analysts, the Index provides benchmarks for product comparison and market trend analysis.

Badges are awarded to products for: Best Results (highest overall Results score), Best Estimated ROI (based on a combination of estimated time to ROI and time to go live), and Users Most Likely to Recommend (highest likelihood to recommend score).

Products included in the Results Index for Customer Success | Winter 2024 have received both a minimum of 10 reviews and 5 responses from real users for each of the results-related questions featured in our review form by November 21, 2023. These ratings may change as the products are further developed, the sellers grow, and as additional opinions are shared by users. A new Results Index report will be issued for this category as significant data is collected.

© 2023 G2, Inc. All rights reserved.

Vitally

4.6 ★★★★½ (358)

Best Results WINTER 2024

Results Score

88%

Avg 79%

Results Data

Likelihood to Recommend

91%

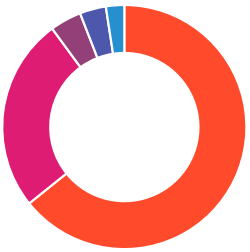
Avg 90%

Meets Requirements

90%

Avg 88%

Top Industries Represented



Computer Software	185
Information Technology and Services	74
Marketing and Advertising	12
Computer & Network Security	10
Financial Services	7

Average User Adoption

Average User Adoption

73%

Avg 65%

ROI Factors

Estimated ROI (Months)

8.63

Avg 14.38

Time to Go Live (Months)

1.9

Avg 2.6

Ownership
Vitally

HQ Location
New York

Year Founded
2017

Employees (Listed On Linkedin)
92

Company Website
vitally.io

© 2023 G2, Inc. All rights reserved.

Custify

4.7 ★★★★½ (308)

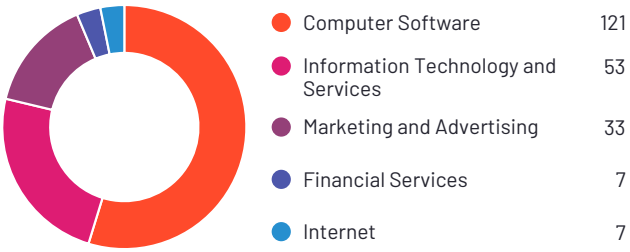
Results Score

Results Data

Likelihood to Recommend

Meets Requirements

Top Industries Represented



Average User Adoption

Average User Adoption

ROI Factors

Estimated ROI (Months)

Time to Go Live (Months)

Ownership
Custify

HQ Location
Munich area, Bavaria

Year Founded
2017

Employees (Listed On Linkedin)
33

Company Website
custify.com

© 2023 G2, Inc. All rights reserved.

ZapScale

4.8 ★★★★★ (45)

Users Most Likely To Recommend WINTER 2024

Results Score

86%

Avg 79%

Results Data

Likelihood to Recommend

96%

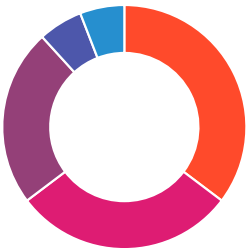
Avg 90%

Meets Requirements

94%

Avg 88%

Top Industries Represented



Computer Software	12
Information Technology and Services	10
Marketing and Advertising	8
Apparel & Fashion	2
Financial Services	2

Average User Adoption

Average User Adoption

58%

Avg 65%

ROI Factors

Estimated ROI (Months)

12.3

Avg 14.38

Time to Go Live (Months)

0.73

Avg 2.6

Ownership
ZapScale Inc.

Year Founded
2021

Employees (Listed On Linkedin)
36

Company Website
zapscale.com

© 2023 G2, Inc. All rights reserved.

Catalyst

4.6 ★★★★½ (493)

Results Score

86%

Avg 79%

Results Data

Likelihood to Recommend

93%

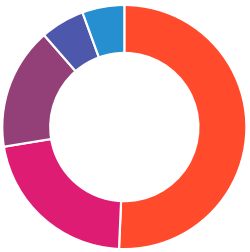
Avg 90%

Meets Requirements

89%

Avg 88%

Top Industries Represented



Computer Software	182
Information Technology and Services	78
Marketing and Advertising	58
Computer & Network Security	21
Financial Services	20

Average User Adoption

Average User Adoption

74%

Avg 65%

ROI Factors

Estimated ROI (Months)

13.43

Avg 14.38

Time to Go Live (Months)

2.36

Avg 2.6

Ownership
Catalyst Software Corporation

HQ Location
New York

Year Founded
2017

Employees (Listed On Linkedin)
407

Company Website
catalyst.io

© 2023 G2, Inc. All rights reserved.

ClientSuccess

4.4 ★★★★½ (415)

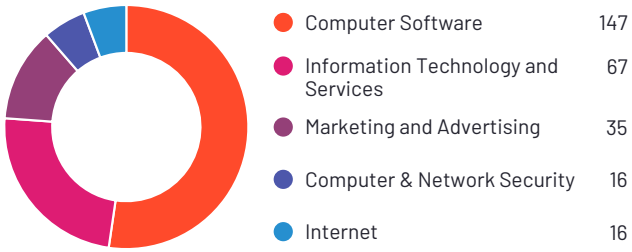
Results Score

Results Data

Likelihood to Recommend

Meets Requirements

Top Industries Represented



Average User Adoption

Average User Adoption

ROI Factors

Estimated ROI (Months)

Time to Go Live (Months)

Ownership
ClientSuccess

HQ Location
American Fork, UT

Year Founded
2014

Employees (Listed On Linkedin)
33

Company Website
clientsuccess.com

© 2023 G2, Inc. All rights reserved.

ChurnZero

4.7 ★★★★½ (1,153)

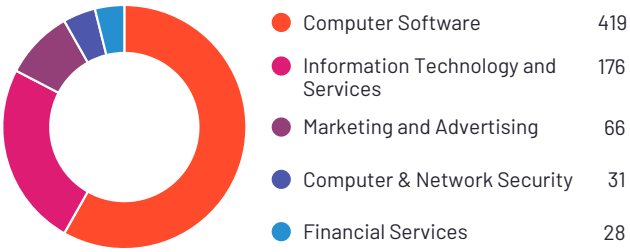
Results Score

Results Data

Likelihood to Recommend

Meets Requirements

Top Industries Represented



Average User Adoption

Average User Adoption

ROI Factors

Estimated ROI (Months)

Time to Go Live (Months)

Ownership
ChurnZero

HQ Location
Washington, District of Columbia

Year Founded
2015

Employees (Listed On Linkedin)
162

Company Website
churnzero.com

© 2023 G2, Inc. All rights reserved.

Salesforce Service Cloud

4.3 (3,549)

Results Score

85%

Avg 79%

Results Data

Likelihood to Recommend

91%

Avg 90%

Meets Requirements

91%

Avg 88%

Top Industries Represented

Information Technology and Services	27
Financial Services	25
Computer Software	23
Manufacturing	15
Hospital & Health Care	12

Average User Adoption

Average User Adoption

66%

Avg 65%

ROI Factors

Estimated ROI (Months)

11.25

Avg 14.38

Time to Go Live (Months)

4.6

Avg 2.6

Ownership
Salesforce

HQ Location
San Francisco, CA

Year Founded
1999

Employees (Listed On Linkedin)
70,180

Company Website
salesforce.com

© 2023 G2, Inc. All rights reserved.

Totango

4.4 (810)

Results Score

83%

Avg 79%

Results Data

Likelihood to Recommend

87%

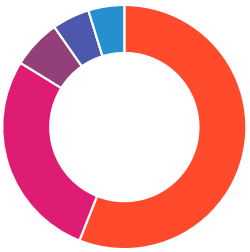
Avg 90%

Meets Requirements

87%

Avg 88%

Top Industries Represented



Computer Software	294
Information Technology and Services	146
Internet	34
Telecommunications	26
Marketing and Advertising	25

Average User Adoption

Average User Adoption

69%

Avg 65%

ROI Factors

Estimated ROI (Months)

17.67

Avg 14.38

Time to Go Live (Months)

3.08

Avg 2.6

Ownership
Totango

HQ Location
Redwood City, CA

Year Founded
2010

Employees (Listed On Linkedin)
149

Company Website
totango.com

© 2023 G2, Inc. All rights reserved.

Planhat

4.6 ★★★★½ (558)

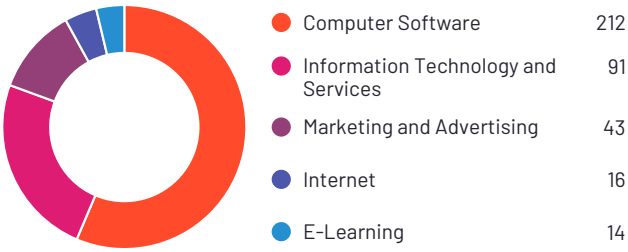
Results Score

Results Data

Likelihood to Recommend

Meets Requirements

Top Industries Represented

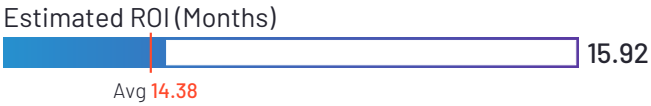


Average User Adoption

Average User Adoption

ROI Factors

Estimated ROI (Months)



Time to Go Live (Months)

Ownership
Planhat

HQ Location
Stockholm

Year Founded
2015

Employees (Listed On Linkedin)
154

Company Website
planhat.com

© 2023 G2, Inc. All rights reserved.

Gainsight CS

4.4 (1,317)

Results Score

81%

Avg 79%

Results Data

Likelihood to Recommend

89%

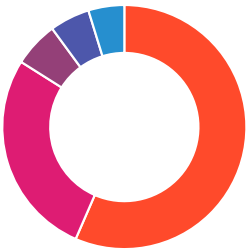
Avg 90%

Meets Requirements

87%

Avg 88%

Top Industries Represented



Computer Software	511
Information Technology and Services	248
Marketing and Advertising	54
Internet	48
Telecommunications	43

Average User Adoption

Average User Adoption

64%

Avg 65%

ROI Factors

Estimated ROI (Months)

18.97

Avg 14.38

Time to Go Live (Months)

4.6

Avg 2.6

Ownership
Gainsight Inc.

HQ Location
San Francisco, CA

Year Founded
2009

Employees (Listed On Linkedin)
1,317

Company Website
gainsight.com

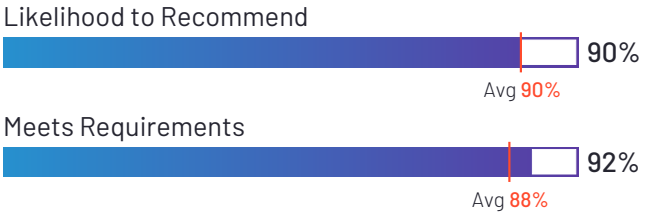
© 2023 G2, Inc. All rights reserved.

OnRamp

4.5 ★★★★½ (86)

Results Score

Results Data



Top Industries Represented

Average User Adoption

ROI Factors

Ownership
OnRamp Technology, Inc.

HQ Location
Boston, MA

Year Founded
2019

Employees (Listed On Linkedin)
17

Company Website
www.onramp.us

© 2023 G2, Inc. All rights reserved.

EverAfter

4.6 ★★★★½ (78)

Results Score

80%

Avg 79%

Results Data

Likelihood to Recommend

92%

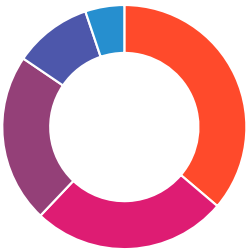
Avg 90%

Meets Requirements

87%

Avg 88%

Top Industries Represented



Computer Software	21
Information Technology and Services	15
Marketing and Advertising	13
Computer & Network Security	6
Hospital & Health Care	3

Average User Adoption

Average User Adoption

53%

Avg 65%

ROI Factors

Estimated ROI (Months)

16.36

Avg 14.38

Time to Go Live (Months)

2.41

Avg 2.6

Ownership
EverAfter

HQ Location
Tel Aviv

Employees (Listed On Linkedin)
33

Company Website
everafter.ai

© 2023 G2, Inc. All rights reserved.

CustomerSuccessBox

4.5 ★★★★½ (134)

Results Score

78%

Avg 79%

Results Data

Likelihood to Recommend

91%

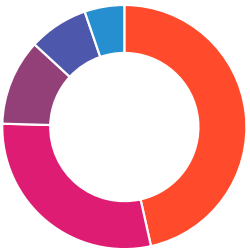
Avg 90%

Meets Requirements

88%

Avg 88%

Top Industries Represented



Computer Software	53
Information Technology and Services	33
Logistics and Supply Chain	13
Education Management	9
Consumer Services	6

Average User Adoption

Average User Adoption

77%

Avg 65%

ROI Factors

Estimated ROI (Months)

15.9

Avg 14.38

Time to Go Live (Months)

2.42

Avg 2.6

Ownership
CustomerSuccessBox

HQ Location
San Francisco, California

Year Founded
2018

Employees (Listed On Linkedin)
5

Company Website
customersuccessbox.com

© 2023 G2, Inc. All rights reserved.

UserIQ

4.4 (117)

Results Score

77%

Avg 79%

Results Data

Likelihood to Recommend

88%

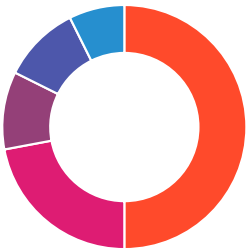
Avg 90%

Meets Requirements

87%

Avg 88%

Top Industries Represented



Computer Software	34
Marketing and Advertising	15
Information Technology and Services	7
Internet	7
Accounting	5

Average User Adoption

Average User Adoption

69%

Avg 65%

ROI Factors

Estimated ROI (Months)

9.36

Avg 14.38

Time to Go Live (Months)

1.33

Avg 2.6

Ownership
UserIQ

HQ Location
Dunwoody, Georgia

Year Founded
2014

Employees (Listed On Linkedin)
2

Company Website
useriq.com

© 2023 G2, Inc. All rights reserved.

STAMP

4.1 ★★★★☆ (11)

Best Est. ROI WINTER 2024

Results Score

Results Data

Likelihood to Recommend

Meets Requirements

Top Industries Represented

Average User Adoption

Average User Adoption

ROI Factors

Estimated ROI (Months)

Time to Go Live (Months)

Ownership
Stonegate

HQ Location
Newport Beach, CA

Year Founded
2005

Employees (Listed On Linkedin)
25

Company Website
stampcsm.com

© 2023 G2, Inc. All rights reserved.

Gainsight Customer Communities

4.4 (194)

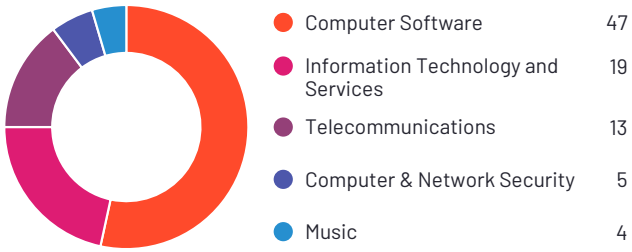
Results Score

Results Data

Likelihood to Recommend

Meets Requirements

Top Industries Represented



Average User Adoption

Average User Adoption

ROI Factors

Estimated ROI (Months)

Time to Go Live (Months)

Ownership
Gainsight Inc.

HQ Location
San Francisco, CA

Year Founded
2009

Employees (Listed On Linkedin)
1,317

Company Website
gainsight.com

© 2023 G2, Inc. All rights reserved.

SmartKarrot CS

4.4 ★★★★½ (31)

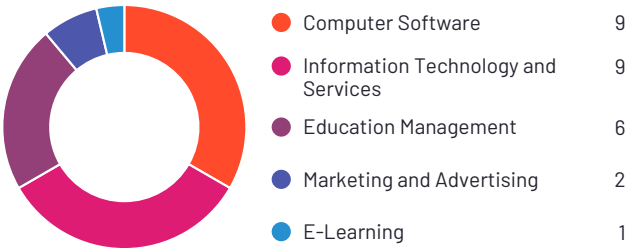
Results Score

Results Data

Likelihood to Recommend

Meets Requirements

Top Industries Represented



Average User Adoption

Average User Adoption

ROI Factors

Estimated ROI (Months)

Time to Go Live (Months)

Ownership
SmartKarrot Inc.

HQ Location
Dallas, TX.

Year Founded
2018

Employees (Listed On Linkedin)
34

Company Website
smartkarrot.com

© 2023 G2, Inc. All rights reserved.

Certinia PS Cloud

4.3 (683)

Results Score

67%

Avg 79%

Results Data

Likelihood to Recommend

85%

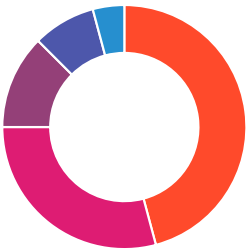
Avg 90%

Meets Requirements

84%

Avg 88%

Top Industries Represented



Computer Software	11
Information Technology and Services	7
Internet	3
Construction	2
Consumer Electronics	1

Average User Adoption

Average User Adoption

71%

Avg 65%

ROI Factors

Estimated ROI (Months)

29.25

Avg 14.38

Time to Go Live (Months)

6.5

Avg 2.6

Ownership
Certinia

HQ Location
San Francisco, CA

Year Founded
2009

Employees (Listed On Linkedin)
886

Company Website
certinia.com

© 2023 G2, Inc. All rights reserved.

Salesmachine

4.3 ★★★★½ (42)

Results Score

63%

Avg 79%

Results Data

Likelihood to Recommend

86%

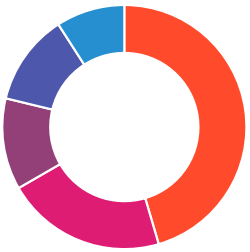
Avg 90%

Meets Requirements

83%

Avg 88%

Top Industries Represented



Computer Software	15
Information Technology and Services	7
Internet	4
Marketing and Advertising	4
Farming	3

Average User Adoption

Average User Adoption

57%

Avg 65%

ROI Factors

Estimated ROI (Months)

15.55

Avg 14.38

Time to Go Live (Months)

3.21

Avg 2.6

Ownership
Salesmachine

HQ Location
Cambridge, Massachusetts

Year Founded
2014

Employees (Listed On Linkedin)
2

Company Website
salesmachine.io

© 2023 G2, Inc. All rights reserved.

Results Index Methodology

Results Index Inclusion Criteria

Products included in the Results Index for Customer Success | Winter 2024 have received a minimum of 10 reviews and 5 responses for each of the results-related questions featured in our survey by November 21, 2023. Inviting other users, such as colleagues and peers, to join G2 and share authentic product reviews will accelerate this process and encourage the inclusion of additional products.

Results Scoring Methodology

G2 rates products and sellers based on reviews gathered from our user community, as well as data aggregated from online sources and social networks. We apply a unique, patent-pending algorithm to this data to calculate the product's Results score. The Results Index for Customer Success | Winter 2024 report is based off of scores calculated using the G2 results algorithm v1.0 from data collected through November 21, 2023. The Results score is affected by the following (in order of importance):

- Customers' reported ease of doing business with the seller based on reviews by G2 users
- Customers' satisfaction with the product's quality of support based on reviews by G2 users
- Customers' likelihood to recommend each product based on reviews by G2 users
- The number of reviews received on G2; buyers trust a product with more reviews, and a greater number of reviews indicates a more representative and accurate reflection of the customer experience

Categorization Methodology

Please visit G2's categorization methodology page to learn more about how products are categorized. For more in-depth information about how we refer to different types of software, please view our list of standard definitions.

Trust

Keeping our ratings unbiased is our top priority. We require the use of a LinkedIn account or verified business email address to validate a G2 user's identity and employer. We also validate users by partnering with sellers and organizations to securely authenticate users through select platforms. We do not allow users to review their current or former employers' products, or those of their employers' competitors. Additionally, all reviews are manually checked by our team after our algorithm filters out reviews that don't meet our submission requirements. All reviews must pass our moderation process before they are published.

G2 may occasionally offer incentives for honest reviews to help us gather a full and accurate data set. These incentives are offered as thank-yous for approved reviews. Incentives are never conditioned upon the substance of the review, positive or negative. Each such incentivized review is disclosed with an "Incentivized Review" banner.

© 2023 G2, Inc. All rights reserved.