

CSM Key Questions to Ask Providers

Company

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| <ol style="list-style-type: none"> 1. Are you primarily a technology provider or an outsource partner? Have you evolved to this role over time or has this always been the case? 2. How many clients do you have? How many have you lost, and why? | <ol style="list-style-type: none"> 3. What size or types of clients fall into your “sweet spot”? Do you specialize in customer support/service or sales? Any key verticals? 4. What peripheral or support services do you offer (e.g., integration, CRM, consulting training)? |
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Products/Services

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| <ol style="list-style-type: none"> 1. Do you provide Surveys, Eye Tracking, Web Analytics analysis, VOC/CEM or several types of solutions? 2. Does your solution tie into web analytics systems? Which ones? | <ol style="list-style-type: none"> 3. Do you provide support to create customer surveys, analyze data, recommend improvements, etc? 4. Does your system compare our data to other companies’ data to give us a benchmark of where we stand? |
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Features

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| <ol style="list-style-type: none"> 1. What key features are included in your solution? <ol style="list-style-type: none"> a. Is there a key feature you have that no one else has? b. What features are currently missing that many of your competitors have? c. What features are on your roadmap? d. What features does management love? What about shoppers? 2. What is your product’s competitive advantage over other packages? Why? <ol style="list-style-type: none"> a. Price? Dashboard? Ease of use? Flexibility? Don’t say “all of the above”. 3. Can your solution provide survey feedback? <ol style="list-style-type: none"> a. How many different surveys are possible at one time? b. Can they be randomly assigned, assigned by customer group, by individual customer, by event? Please list all capabilities. 4. Can your solution tie into online, offline, phone, paper, etc., customer satisfaction sources of information? Into external surveys? Please describe. 5. Do you provide tools to help identify satisfaction metrics by customer group, by individual customer, or across all customers at one time? | <ol style="list-style-type: none"> a. How can your solution track metrics by customer groups? Does it help create the groups, or does it need them to be imported? 6. Can your solution provide voice of the customer feedback for a specific set of customers? 7. Does your solution utilize a customer satisfaction methodology? How does it compare to the ACSI Methodology? 8. Does your solution identify what’s driving customer satisfaction and what will have the greatest impact on behavior and financial performance? 9. How does your solution prioritize investments based on ROI? 10. Does the solution benchmark against competitors and leading websites? 11. How does the solution help with conversion? 12. Does your solution quantify the impact of a service or support experience on your customers’ perceptions about your organization and their likelihood to buy from you in the future? 13. Is post-sale analysis performed? How? 14. Does your solution publish and support APIs for integration with other systems (such as CRM, analytics, customer management), if I choose not to use your modules? If not, how do I integrate? |
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Pricing

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| <ol style="list-style-type: none"> 1. For technology providers; do you charge by the user/month or perpetual license? 2. How do you charge for annual support? What about maintenance? 3. For outsource partners; do you charge by the hour, by the dedicated CSR or some other model? | <p>What are the setup/training fees? What happens if calls to the center exceed forecast? What “value-add” services do you offer?</p> |
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