

# 21 QUESTIONS YOU NEED TO ASK

WHILE CHOOSING  
A CUSTOMER  
SUCCESS  
PLATFORM



A Customer Success Platform is the perfect tool to obtain key insights on all customer and user interactions with your business and can help you deliver a better experience to your customers. While choosing a customer success platform which is best suited for you can be tricky, we've collated a set of questions and divided them into segments so you can easily evaluate the best

Customer Success Platform for you.

## PLATFORM

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1. What is the USP of your platform? How does it stand different from others?
2. How will it help to ease my CS operations?
3. How does your platform calculate customer health score?
4. Will it help me track data from all customer touch points?
5. Can I add my unique success metrics to your platform?
6. Can I collaborate with other team members on customer issues through the platform?
7. Do you have a competitor feature comparison sheet? If yes, could you please share it with me?

## PRICING

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1. What does the pricing structure look like?
2. What is the initial cost, and would it change as we grow and scale?
3. Is the pricing user/seat based?
4. Are there any additional costs involved? If yes, what are they?

## INTEGRATIONS

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1. Can your product integrate with all major applications?  
(Make sure you have a list of all the key apps you use to track customer data)
2. How long does it take for integrations to be completed? Is it real-time?
3. Could you please share any documentation on integration capabilities and limitations, if available?

## ONBOARDING

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1. How long does it take to implement the platform?
2. What are the things I need to be prepared with before implementation?
3. What measures will be taken to make the implementation and adoption process smooth?

## OTHER QUESTIONS

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1. What security certifications do you have?
2. Do I need a technical person to manage your product?
3. What kind of support do you have? Is it paid or free?
4. What kind of reports can I generate from your product?