CHURNZERO

Customer success software request for proposal (RFP) template

Use this template to outline and organize the high-level questions you should include in your request for proposal (RFP) for customer success software. Strategically structuring your RFP ensures you solicit quality vendor responses that are relevant, useful, and clear while improving overall process efficiency. It's important to note that depending on your unique business goals, you may not need to include every question.

Access our customer success software RFP worksheet.

GET THE WORKSHEET

Platform functionality

Ask the potential customer success software provider:

- Does your software have the ability to build groups of customers/users based on criteria such as customer/ user characteristics, usage, and engagement?
- Does your software offer alerts via multiple channels to our team regarding customer health, usage, etc.?
- Does your software support parent/child relationships?
- Does your software support multiple user role types and permissioning/access control?
- Does your software provide a mobile application/mobile compatibility?

Things to consider

Ensure the customer success software provider delivers robust segmentation features for active engagement and smart automation. Choose a system with alert capabilities that integrate with tools like Slack, email, or Teams for instant updates on customer health and behavior. You will want a system that can manage parent/child relationships to effectively maintain customer data. Finally, confirm permission settings and mobile compatibility to ensure flexible and secure access.”

Workflow automation

Ask the potential customer success software provider:

- Does your software support functionality to create tasks/log activities within your application? If yes, are they generated manually by users and/or automatically by the system?
- Does your software support notifications of task assignment and provide reminders for incomplete/overdue tasks?
- Can you support round robin assignment? If so, how?
- Does your software support automated email communication to customers based on customer usage behavior or engagement history for example?
- Can these automated emails be directed to a specific contact or multiple contacts within an account?
- Can automated emails be configured in a sequence or cadence to send more than one email out over time?
- Does your software support any other workflow automations?
- Can your automation features leverage branching or conditional logic?
- How is a customer exited from this automation? Is this manual or automated?
- Does your software support permissions to restrict who can view or edit a customer record?
- Does your application allow for configurable/custom views based on user role?
- Does your software support manual or automated assignment of tasks to a user or non-user of the system?
- Does your software provide dashboarding & reporting capability?
- Does your software allow exporting of our data to a Microsoft excel/CSV file?
- Does your software support uploading documents to a relevant account, meeting, or task?

Dashboards and reporting

Ask the potential customer success software provider:

- Does your software support external reporting to our internal leadership and external stakeholders?
- Can your platform support and perform the following reporting capabilities?
    - CSM Book/portfolio summarizing account health and upcoming renewals
    - CSM activity reporting such as time spent with accounts, account engagement tracking such as missing QBRs, time since last communication?
    - Overall team/leadership view of account health prioritizing upcoming renewals, key accounts, industry breakdown, etc.
    - Upsell and renewal forecasting including GRR, NRR, and churn rate calculations
- Can your software assist with the preparation and sending of client-facing reports? Please elaborate.
- What methods can be used to deliver the reports listed above?
- Does your software assist with managing and optimizing customer onboarding?
- Does your software assist with customer lifecycle management?

AI technology

AI technology integration strategy

Describe your company's strategy and roadmap for adopting AI technology and integrating it into your products for the benefit of customers. Please provide details on how you plan to leverage AI to enhance existing features, introduce new functionalities, or improve overall user experience.

Use cases and applications

Share specific use cases or applications where you foresee incorporating AI within your products. Highlight areas where AI will play a pivotal role in providing value to end-users. Additionally, elaborate on how these AI-driven features align with your overall product development and business objectives.

Data handling and privacy considerations

Address how your company plans to handle data when implementing AI technologies. Specify any measures taken to ensure data privacy and compliance with relevant regulations. Provide insights into the data governance practices that will be employed to maintain the integrity and security of user information.

Things to consider

When evaluating AI tools in customer success software, focus on solutions that enhance the strategic aspects of your role. Look for AI that streamlines daily workflows, deepens personalization, and provides actionable insights into customer behavior. Essential AI features include:

- Sentiment analysis to adapt engagement based on customer emotions.
- Topic detection to align conversations with customer needs.
- Engagement network mapping to optimize your team's interactions with customers.
- Advanced summarizations of customer interactions with actionable intelligence and sharing options.

Select AI that transforms routine tasks and predicts growth and churn, pivoting your role towards strategic advisement backed by comprehensive data.

Customer health scoring

Ask the potential customer success software provider:

- Does your software support scoring a customer's health. Can this be customized?
- Does your software support the ability to create multiple health scores using different criteria and weighting?
- Can your software use [insert criteria] as health score criteria?
- Does your software support triggering alerts based on changes in health score?
- Does your software support triggering workflows based on changes in health score?

Things to consider

Customer health scoring is the process of evaluating a customer's overall engagement and satisfaction with your company in a simple score. It is used to gauge renewal likelihood. Companies score in many ways, including assigning points, implementing rankings (A, B, C, D), or using a color-coding system (green, yellow, or red) to indicate good, average, or poor health. Health scoring methodologies need a combination of several data types and sources to be an effective key performance indicator (KPI). Potential data sources include marketing automation platforms, customer relationship management (CRM) software, ticketing systems, customer messaging platforms, and your own product.

Integration within our application

Ask the potential customer success software provider:

- Does your software provide tools to communicate with users within our application, such as pop-up messages, chat, and tutorials?
- Does your software support the ability to guide users (step by step) through a particular task based on specific criteria such as first login, a new feature released, user click, etc.?
- Does your software support the ability to launch a guide based on the page they are on?
- Does your software support the ability for messages and notifications displayed in our application to match our branding?
- Does your software support the ability for guides or tutorials to be launched following an upgrade to highlight new features?
- Does your software support the ability to send NPS® and other surveys to users through our application?
- Does your software support the automation of sending the NPS survey to customers via email?
- Does your software support automatic sending of follow-up questions based on NPS responses?
- Does your software present the NPS for each account and track the historical performance?
- Does your software support the ability to report on feature usage correlated with NPS?

Tracking usage in our application

Ask the potential customer success software provider:

- Does your software display and report on usage data at the account level of our application?
- Does your software display and report on usage at the individual level of our application?
- Does your software track user logins?
- Does your software track the time the user spends in our application?
- Does your usage data include clicks, page views, save events, etc.?
- What methods does your software support for gathering this data? How frequently is this information updated in your system?
- Does your software support receiving usage data from on-premise applications?
- Does your software report on usage trends?
- Does your software support receiving user information such as title, phone number, or address from our application?
- Does your software view the number of active users over time in a given account?

Onboarding, implementation, and ongoing support

Ask the potential customer success software provider:

- Does your software offer functionality to manage a new customer onboarding process?
- What resources do you provide during implementation? Post implementation?
- What resources or headcount will we need to provide?
- Does your software require your professional services to install, maintain or upgrade an integration? Do you have third party partners complete implementations?
- How do you support or enable training (of our CSMs), both at implementation and for new starters?
- What is your post-implementation account management/success offering?
- What level of internal technical resources will be needed to maintain your software post-implementation?
- What is your support SLA, who can raise support issues and what is the process to raise them & track updates?

Things to consider

- Ensure the software allows you to create custom onboarding journeys with defined milestones.
- Successful implementation is critical. Confirm you will receive a dedicated team (which should include a data specialist, configuration specialist, CSM, and support.
- Ensure your team receives and has access to training.
- Check the software's support SLA details, including support hours, who is authorized to raise issues, and the process for tracking updates and resolutions.

Business systems integration

Ask the potential customer success software provider:

- Does your software integrate with [insert CRM]?
- Does your software integrate with [insert support ticketing software]?
- Does your software integrate with [insert billing/invoicing system]?
- Are there any other relevant systems you integrate with?
- Does your software require us to purchase any third-party tools? What integrations will we need?
- Does your software integrate with Microsoft Outlook 365 email/G Suite Gmail?
- Does your software integrate with Microsoft Outlook 365 Calendar/G Suite Calendar?
- Does your software integrate with Microsoft Excel/Google Sheets?
- Does your software integrate with Salesforce and how often is the data synchronized?
- Does your software retrieve the following Salesforce records: Account Information, Opportunities, Contacts, License count, and License Type?
- Does your software write data back to Salesforce?
- Can CSMs manage Salesforce Opportunities within your platform?

Compliance, security, and governance

Ask the potential customer success software provider:

- Are you GDPR compliant?
- Where will our data be hosted?
- What is your security posture? Please link to or attach relevant documentation.
- Do you perform an external penetration test? If so, how often?
- Are you SOC-2 Type 2 compliant? If so, when were you last certified? Please provide a copy of your audit report.
- Are you ISO 27001 compliant? If so, when were you last certified?
- Are you HIPAA compliant? Can you provide your attestation report?

About the potential software provider

Ask the potential customer success software provider:

- Are you funded? If so, by whom, last round and when?
- Please point to user reviews of your software. (G2, Trust Radius, Capterra)
- How many customers do you have?
- Are you able to provide customer references upon request?