Choosing the right CX platform

The key considerations, topic areas and killer questions you need to ask when 'kicking the tyres' of a new CX platform.

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State of the nation

SaaS platforms are table stakes in VoC programmes. The market is overwhelmed with demos and slick 'talk tracks'.

On the surface, technologies can appear to do the same thing… So how do you inspect under the hood and ensure the platform you select stands up to scrutiny?

Ipsos has (based on our extensive implementation experience) put together the top capabilities to assess, killer questions you need to ask and red flags to watch out for.
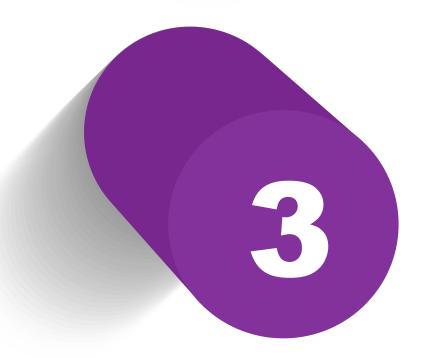
You're welcome!

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Three things to consider

1 **Functionality:** **What do you need today versus what's on the roadmap?** Make sure the tech has sufficient bandwidth for this to be a **future proofed solution** (at least for the next 3-5 years).

2 **Commerciality:** **Based on scope, what is your Y1 investment and total contract liability?** Platform providers have unique ways of pricing, make sure you build in **features you intend to adopt** in the short term so there are no additional licencing surprises.

3 **Brand Fit:** **How does the vendors purpose, culture, vision and values align with your organisation?** Think about how this solution will **integrate with existing technologies** and how it will be adopted by key users.

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Topic areas and killer questions

Rather than exhaustive list, this is a summary of basic watch outs and platform differentiators that may influence your technology decision. They cover:

1. **Signal capture**
2. **Reporting**
3. **Insight activation**

Factors that impact how much you dive into each topic include your:-

- Current programme maturity

- CX ambition

- Intended pace of change

- Wider tech ecosystem

- Desire to self serve (which is a whole article in itself!)

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1. Signal capture

Be clear about what you need now in capturing solicited and unsolicited, structured and unstructured data.

Vendors are great at long lists of ways to collect feedback. Don't get distracted by nice to haves that require effort to mobilise and will not deliver a cost/benefit to your programme.

Ask which features are core to the solution versus bolt-ons from legacy acquisitions.

This can impact the implementation effort and reporting user experience.

Understand the pricing model.

What is part of the baseline pricing and what would be an upsell later down the line? Are costs based on number of responses, additional users or a combination of the two?

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2. Reporting

Get to grips with role based reporting.

Think about key audiences in your business and the data they need to access. The number of roles you have drives up complexity and can impact implementation effort and the licence fee.

Meet users where they are.

Many vendors have mobile versions of their reporting solution – check is this is a native app or a cut down browser view. Make sure you see a demo of the app on a mobile device and bring end users into the discussion to ensure it meets their needs.

Stress test the Text Analytics solution.

This is an area where there is clear differentiation between providers. Are you getting a glorified word cloud? Can you conduct impact analysis on unstructured data sets? Do all roles have access? How accurate is the industry or channel starter pack and how easy is it to personalise and update?

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3. Insight activation

Model how closed loop work flows will integrate with your existing processes.

Most vendors have operationalised closed loop systems. Check out what templates are available and how you can capture root cause, re-allocate tickets and if the system works natively on the go (or if this is just a desktop feature).

Explore what monitoring solutions are out of the box.

Some vendors have 'healthcheck' reports as part of their core solution to measure engagement including logins and session time. These can prove to deliver valuable insight when embedding the programme and developing targeted training and support.

Understand how easily the technology integrates with other systems?

Really dig into this and ask for case studies. Be clear on the use case for integration and if the workflow should be single or bi-directional. Ask what integrations are out of the box and which are custom. Establish if the solution is sufficiently flexible or will you need to change import files to ingest data? Critically make sure you have IT engagement and understand the effort on your side for the integration to go live.

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Now what?

We've been there, done that and got the T-shirt!

Lean on Ipsos' agnostic and impartial expertise to help you develop a clear set of requirements to procure the right platform for your CX programme in the short, medium and long term.

We're just scratching the surface

Want to find out more?

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