InMoment

CUSTOMER EXPERIENCE (CX) FOR B2B TECH

Software Buyer's Guide

10 Questions to Ask to Make Sure You Buy the Best Software for Your Needs

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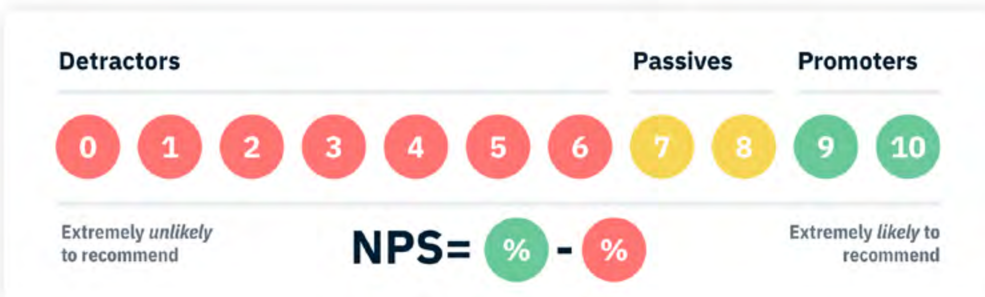
Why Read This Guide Before You Buy?

When the boss said, “We need a customer experience (CX) program!” you became the CX champion. Right? Now you have to find and evaluate several vendors, and you don’t have much time.

There are some great customer feedback management software vendors out there. And we know, we’re one of them. But while they all offer, in one form or another, the ability to ask all-important questions like, “On a scale of one to 10, how likely are you to recommend this product?” that's where their similarities end.



> **“Customers who had the best past experiences spend 140% more compared to those who had the poorest past experiences.”**
>
> **Peter Kriss, Harvard Business Review**

Comparing several platforms will make you wish you had a spreadsheet just to be able to chart all of their different capabilities, services, and prices (spoiler alert: we’ll give you that spreadsheet below!). But even that won’t help you answer the most important question: is this the right software for you?

If your business is high-growth or enterprise-level, you’d benefit from having more than a CX tool. And, especially if you are B2B, SaaS, or digitally driven, there are cutting-edge CX metric innovations you’ll very much want to look into.

This guide is designed to help you ask the right questions and compare the right things to be able to confidently choose the software that meets your needs now, and will grow with you later.

Let's Start With You: What Is Your Goal?

Finding not only a good CX program, but the right one, really begins with you. What are you trying to accomplish? Voice of customer programs aren't the end goal: they're the means to an end.

Is your company working toward being more customer centric? Are you trying to retain more customers? Get more business?

Or, maybe this isn't your first rodeo. Maybe you've used a survey platform before. Now, you're looking for software that will help you drive experience improvement. One that offers a more modern customer journey approach with advanced survey triggers, AI-driven analytics, or is simply more aligned with your stage of growth.

Whatever your larger goal is, keep it top of mind, because you're not just looking for survey software. You're looking for the best way to help your company serve your customers.

Asking these questions will get you there.

QUESTION #1

What Metrics Do You Want to Track and Improve?

Net Promoter Score is used quite a bit as the foundation of a CX program. It is a powerful question that cuts to the truth of customer loyalty. Will customers recommend you, or won't they?

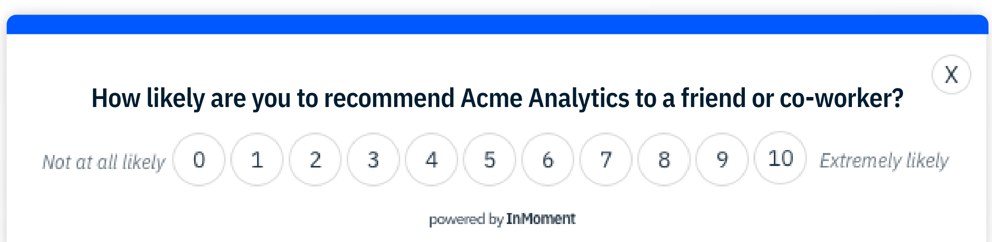
Over time, as you build out your voice of customer (VoC) program, you may find that additional CX metrics like CSAT (Customer Satisfaction) and CES (Customer Effort) can compliment NPS and help you understand the customer journey in a more holistic way.

For example, with journey point triggers, you may want to consider whether NPS is the right question to ask in all cases. You may want to ask customer satisfaction (CSAT) questions about a specific feature or interaction. Or ask customer effort questions (CES) around how much work is required to achieve a goal. Sometimes these questions are more relevant than NPS.

Here's what each question reveals:

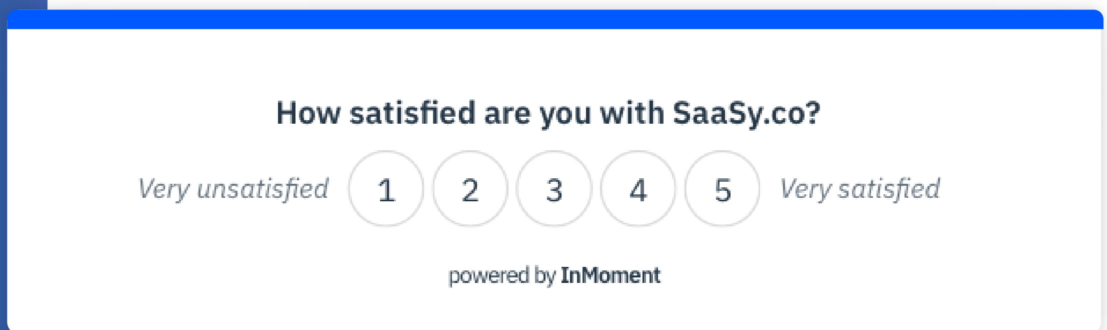
Net Promoter Score

NPS asks, "How likely are you to recommend this product/company to a friend or colleague?" This consummate loyalty question is a great one to start with. It can help you identify customers who are likely to give negative reviews, customers who are at risk of leaving if their concerns aren't addressed quickly, and customers whose enthusiasm you can leverage to expand brand awareness.



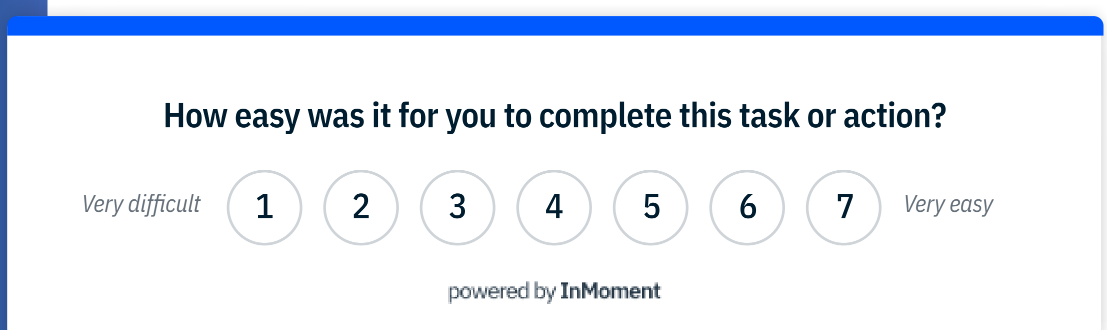
Customer Satisfaction Score

CSAT asks “How satisfied were you with the product/interaction?” and is useful for measuring satisfaction about specific features and products. It is common to ask the CSAT question after a support interaction.



Customer Effort Score

CES gauges how much effort the customer puts forth to complete a task or solve a problem. Research by CEB, the creators of the Customer Effort Score, found that organizations “create loyal customers primarily by reducing customer effort—i.e., helping them achieve their goals quickly and easily.” SaaS companies often ask CES questions at the end of onboarding or after a support interaction.



If these metrics are of interest or are already being used by your company, you may want them on your radar as you evaluate software vendors.

QUESTION #2

What Is the Best Way to Survey Your Customers?

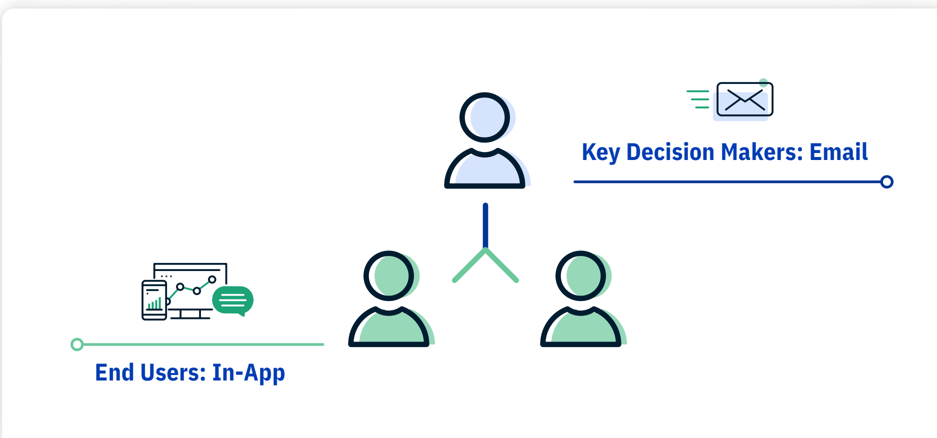
Read our blog about how to choose the best feedback channels for your business.

LEARN MORE

In theory, you can communicate with your customers in any number of ways—on your website, inside your web or mobile app, through email, social, or even via text.

Each segment of your customer base probably has a preferred method of communication. For some—like senior leaders—it might be email. Meanwhile, some others may not respond to you at all unless you are asking inside your app.

With SaaS in particular, you should ask: who are your stakeholders? Who are the decision makers, and are they the ones using your product on a daily basis? Probably not. Those are often two separate groups. And that determines which channel you'd use to send a survey. If you want the buyer's feedback, and they aren't logging into your product every day, then an in-app survey wouldn't reach them. But, if you want the opinions of people who are using your software, they might not respond to email, but would respond to an in-app survey.



The right channel can also depend on the customer journey touchpoint. It may be better to send an email survey after a support interaction but use an in-app survey to ask for product feedback.

When choosing a CX platform, it's important to take your customers' preferred channels of communication into account. After all, the survey doesn't work if people don't respond.

QUESTION #3

Which Channel Do You Want to Start With?

It's common for people to ask us about email surveys because they think email is the only option. Clearly, that isn't the case. If you've answered the first question, then here's the follow-up: Where would you like to start? Each channel has pros and cons.

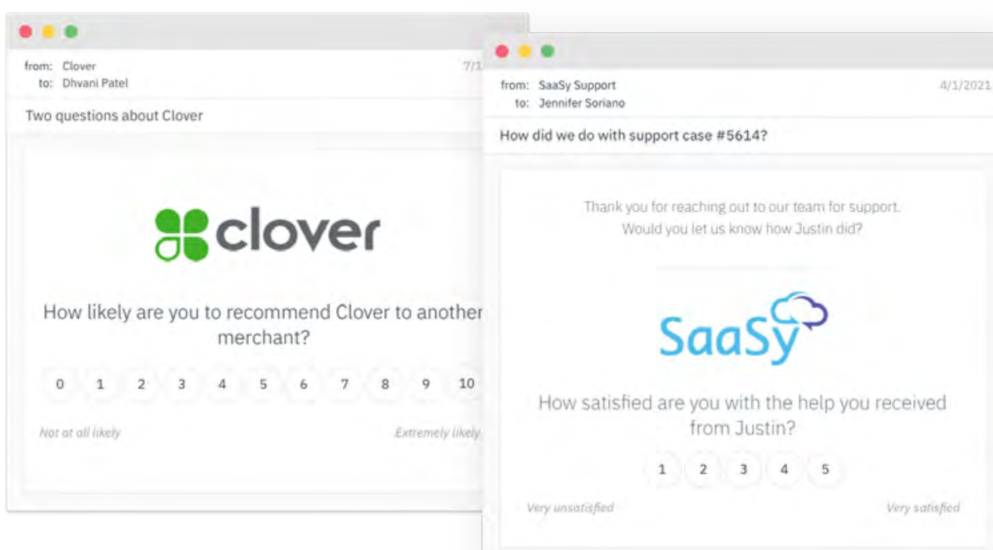
Email

PROS

Higher rates of qualitative feedback (customers who do take the time to answer a customer feedback survey via email are more likely to be invested in your brand and take the time to write more detailed comments).

CONS

Lower response rates (inboxes are already so crowded and emails can be easily deleted).



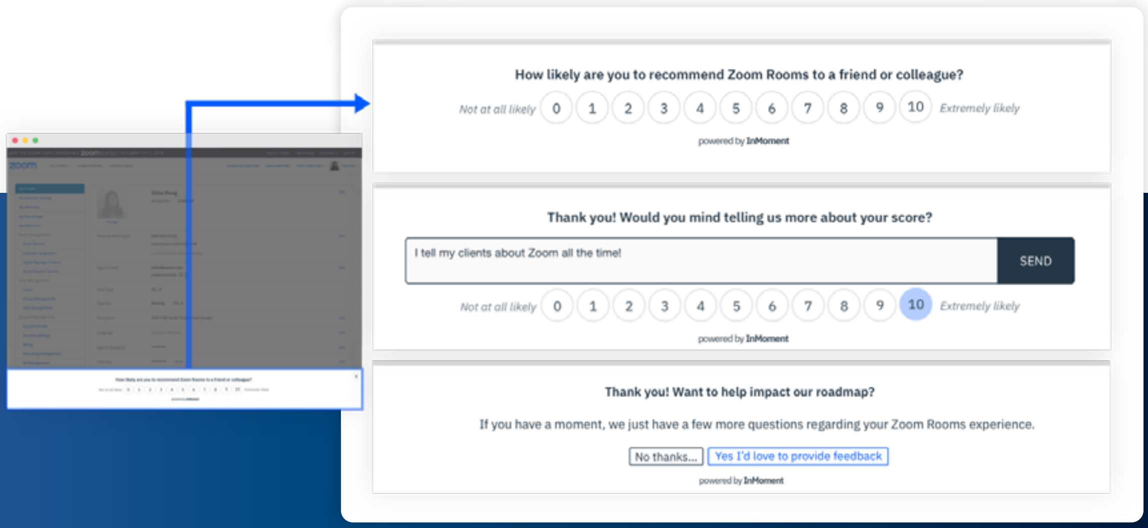
In-App (Web or Mobile)

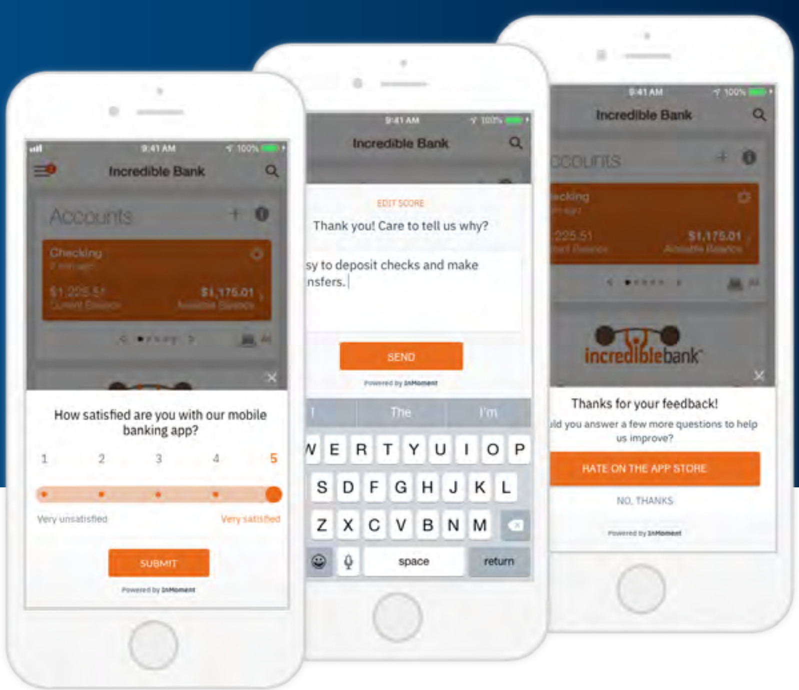
PROS

Higher response rates. In-app surveys can deliver contextual feedback (when customers are using the product when they answer the survey). So you hear from more of your users.

CONS

Fewer in-app respondents will take the time to give qualitative feedback.





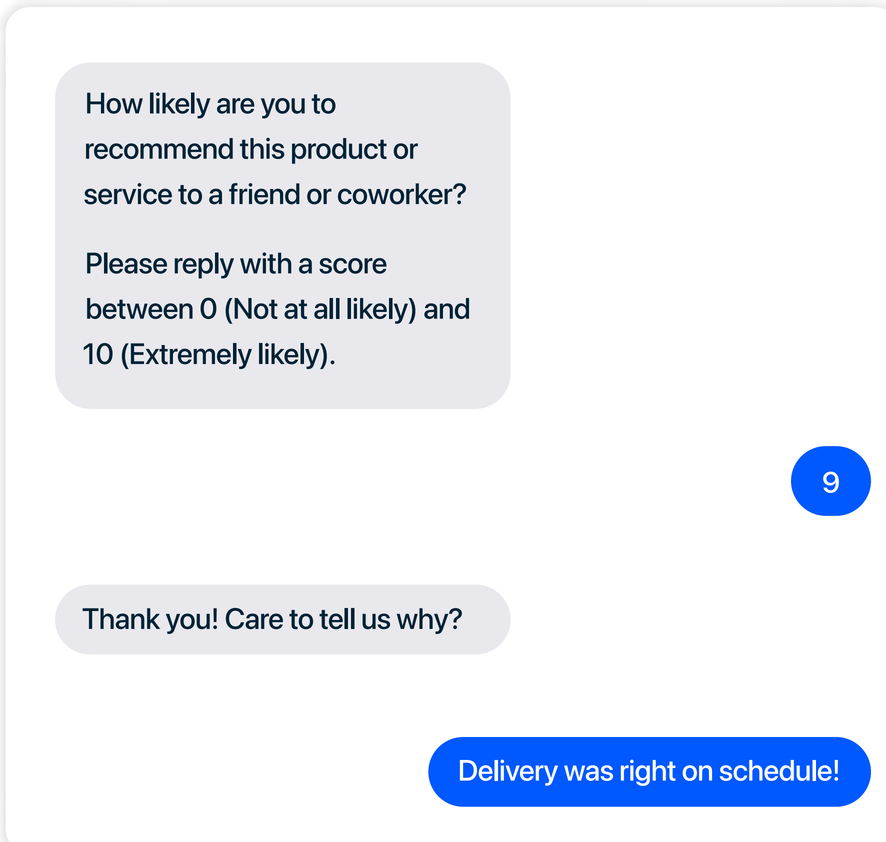
SMS

PROS

More effective and immediate method for grabbing customer insights after transactions, deliveries, and services.

CONS

Appropriate only if a customer is expecting to hear from you via text. Even if you have a customer's phone number, be cautious here. Also, SMS coverage can vary by region or country.



There's no shame in starting small. It's not easy to take on a huge customer feedback program if you're just starting out. Choose a channel, pick a customer base, and start getting feedback. You'll eventually find that different customer segments or journey points benefit from different channels, and your CX program will evolve accordingly.

Expect your CX program to mature over time and select a vendor able to support the increasing sophistication you'll likely need.

QUESTION #4

When Will You Survey Your Customers?

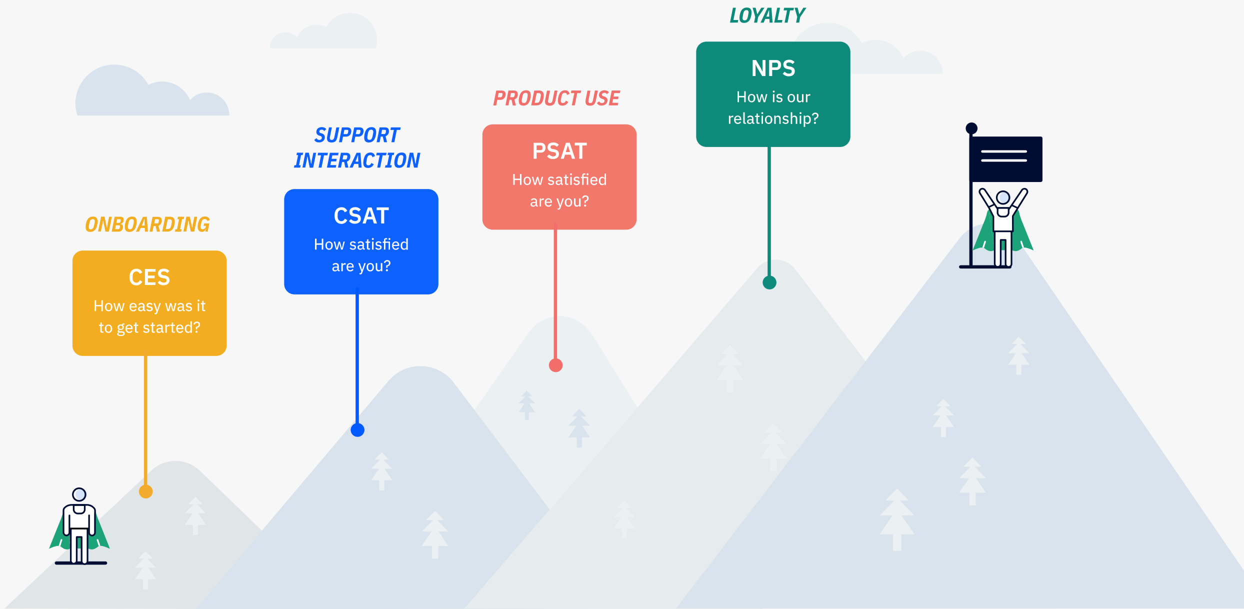
When it comes to deploying your CX surveys, there are two primary approaches:

Relationship Monitoring

This approach sends surveys at regular intervals overtime to assess your customer's overall loyalty to your brand—rather than just their satisfaction with their last interaction. Here's a closer look at using CX metrics to monitor customer relationships.

Campaign Style: Email is traditionally used to send surveys to your customers en-masse (often quarterly or annually). Annual surveys suffer from a few issues: they aren't very relevant to the customer, they don't give you timely feedback, and the sheer amount of data present at one time can be overwhelming. That said, this method may be appropriate if you're committed to doing an annual brand or relationship survey (but if your focus is NPS, it's terribly old-school).

Drip-Cadence Style: This is the update to the classic relationship approach and is used by many subscription-based products and services. The survey rolls out to check customer pulses every three to six months as part of an ongoing customer health program. Not every customer is surveyed at the same time, so you get a constantly updated score based on the overall satisfaction of your customers.



Checking in at Journey Points

In this case, often called "transactional CX," surveys are sent after a customer has an interaction or completes a transaction with your company. This approach works well when you've mapped out your customer journey and can find logical points at which to check in with your customers via a survey. CX software platforms that can integrate with Mixpanel, Intercom, Salesforce, Zendesk, and other systems of record work especially well for this type of timing. The transactional survey model pairs well with a campaign and cadence style approach.

Once you know the approach you need, dig in and see if vendors can deploy surveys the way you prefer. Each vendor has different capabilities. For example, if you are sending email surveys, do you want to do so from your own platform via Hubspot or Marketo? Or do you prefer to upload a list of customers and have the vendor's software send the surveys? And, do you need the ability to trigger surveys based on customer attributes and actions recorded in your CRM?

What is the right question to ask at journey points?

In some contexts, a Customer Satisfaction (CSAT) or Customer Effort (CES) question is more relevant than Net Promoter Score. Read our post on the InMoment XI blog to learn more.

QUESTION #5

Who Else Should See Your Customer Feedback Data?

Every department in your company can benefit from understanding your CX metrics, and we encourage our clients to share their data as widely as possible. Departments like customer support, marketing, customer success, and product development will be more accountable for customer experience improvement if they have easy access to this data.

In addition, it is often helpful to have multiple team members access your CX platform so they can help close the loop with customers, dig into analytics, and see a dashboard customized for their needs.

Check to see how easy it is to give others in your company access to your analytics platform. Are there different admin permission levels? Is there a limit to the number of people who are allowed access?

> **"For metrics like NPS, CSAT, or CES to drive customer-centricity, the CX champion must evangelize the program across the company, and that means making customer feedback data accessible. Software can support this if it is sophisticated enough to meet the needs of product development, marketing, support and success without requiring those teams to learn a complex new platform. Find a balance."**
>
> **David Joiner, Chief Technical Officer, InMoment**

QUESTION #6

Will You Need Text and Sentiment Analytics?

QUESTIONS TO ASK:

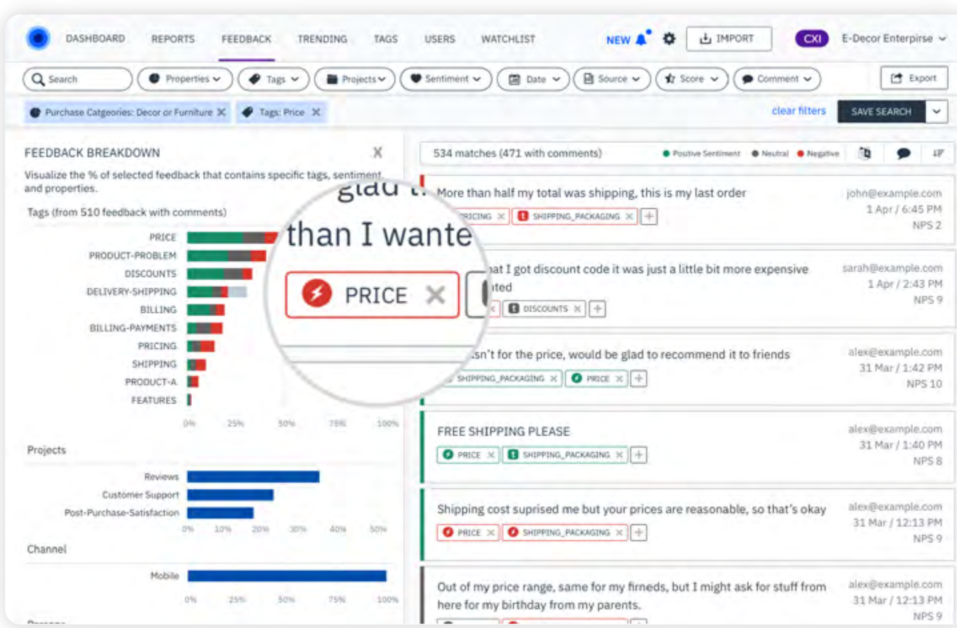
Will I need to seek an additional vendor for text and sentiment analytics? Are text and sentiment analytics worth it?

Yes for some companies, no for others. Read this [InMoment XI Blog](#) to learn whether or not your program needs it.

Today's customers have little patience for lengthy surveys. Modern microsurveys invite customers to explain their score in their own words. This yields rich qualitative feedback that can guide product and process improvements. However, deriving insight from free text is a time-consuming challenge—and many companies don't bother! If you think you'll receive more than a few hundred comments each month, AI-driven analysis is something you should consider.

By surfacing themes and issues for you, text analytics software can reveal why your customers love you—or don't. This insight makes a CX program actionable whether you are prioritizing product improvements, getting a handle on operational issues, or taking customer experience to the next level.

Machine learning can now quickly auto-tag and assign sentiment to each customer comment right down to the tag level—but getting it right is tough. A good software vendor combines cutting-edge technology with a team that works with you to ensure you get quality results out of the gate. This leaves you free to focus on taking action.



QUESTION #7

Does the Software Play Well With the Rest of Your Tech Stack?

Moving Data to Other Systems Using Integrations

You should be able to take your data and share it through communication tools like Slack and Intercom (or into CRMs like Salesforce). This is the best way to get customer feedback in the hands of teams that can take action and close the loop with customers.

Triggering Surveys Based On Events in Other Systems

This is especially helpful if you are using surveys to monitor customer journey touchpoints like onboarding, support interactions, and renewal. Look for native integrations.

Look for Native Integrations

Whatever your tech stack is, you'll want to take note of CX vendors that offer native integrations to your systems of record. Native integrations remove technical and logistical hurdles to the setup and ongoing maintenance of your program.

For example, we offer a native, two-way Salesforce integration. If a vendor isn't on the AppExchange, you may still be able to get data into Salesforce, but it would require coding and technical support on your end.

When vetting a CX program, you may want to ask whether the vendor has native integrations with your existing tech stack. If not, what would be required to make it happen?

QUESTION #8

How Much Effort Will It Take to Set Up?

Small teams can often set up and go very quickly, while larger, cross-functional efforts may require additional consultation. This means that using software and services that offer customer support and success at all levels can give you a substantial leg up. Some CX platforms require service hours to get set up. Others, like us, go so far as to offer live support.

Ideally, your potential vendor will add value right from the start by listening to your goals and providing unbiased advice on how to best achieve them—not just deliver you a score. The customer success team can coach you on voice of customer (VoC) best practices, including proven approaches to implementation that align with your business model.

Does the solution require training? Can you set it up yourself? Will customer success teams be there to support you if you need it? These are all excellent questions to ask.

The self-serve style usually translates to limited customer support and robust FAQ content. If you are a small business and that's all you need, then these programs can be good options. But if you are a larger company with more sophisticated needs, having a customer success manager in your corner can make all the difference.

INMOMENT OFFERS ONE-ON-ONE COACHING VIA CONFERENCE, CHAT, AND EMAIL

QUESTION #9

How Innovative Is the Software Vendor?

Software for improving experiences is changing all the time. Customer expectations change quickly and so does technology. If it feels like you are in a customer experience arms race with your competition, you aren't alone. You need an innovative CX platform to ensure you keep up. Innovative doesn't have to mean expensive or complex; what it does have to mean is that the software you choose has to be committed to defining the cutting edge.

How can you tell? Check to see if the vendor is producing thought leadership content on their blog and website. Look at their resources: blog, ebooks, case studies, social media. Are these resources genuinely helpful, or just covers packed with fluff? Is the vendor talking about upcoming product upgrades, improvements, and expansions?

More specifically, will experts be there to advise you as your VoC program matures, and will the software be able to meet your changing needs? Innovation is paramount, especially when it comes to customer experience.

THOUGHT LEADERSHIP & INNOVATION:

What does this look like? Read this article to track the latest product innovations.

QUESTION #10

Does the Vendor Work With Companies Like Yours?

If the CX vendor works with companies similar to yours, they probably understand your needs better than one that doesn't. It will be better able to help you get the information you need to improve the experiences of your customers.

Look at its customers page and review sites to find out who it's working with. And, during your product demo, don't hesitate to ask: "What customers do you work with that resemble me?"

DECISION TIME

Vendor Evaluation

You may want to start making your vendor evaluation list by first talking to friends and/or colleagues who have used a CX vendor before (and have recommendations). Or, read customer reviews on sites like G2 and factor those opinions into which platforms you choose to investigate further.

Then, using the answers to the questions we've listed in this guide, develop a matrix spreadsheet. Here's a downloadable Excel template to get you started. Once you have that vital data in one place, request a product demo from two or three vendors.

Demos can tell you a lot about a company. And, once you schedule a demo, notice which companies respond fastest—it's your first look into how customer centric they really are and how they will treat you in the future.

Good luck!

For more information please visit our website:
https://inmoment.com/

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About InMoment

Improving experiences is why InMoment exists. Our mission is to help our clients improve experiences at the intersection of value—where customer, employee, and business needs come together. The heart of what we do is connect our clients with what matters most through a unique combination of data, technology, and human expertise. With our hyper-modern technology platform, decades of domain authority, and global teams of experts, we uniquely deliver a focus on Experience Improvement (XI) to help our clients own the moments that matter. Take a moment and learn more at inmoment.com