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# Checklist

## Customer Success Platform Evaluation & Implementation

Developed based on our years of experience in implementing Customer Success Platforms and the challenges faced during these projects, this checklist is designed to help you evaluate and prepare for your CSP implementation.

Use it to guide your assessment of current processes, identify key areas for improvement, and ensure a smooth transition to a new CSP. For each topic, answer the questions, mark them as completed, and add any relevant notes. This will help you track your progress and ensure all critical aspects are addressed.

Topic	Questions	Completed	Notes
<b>Strategy</b>	How do you currently measure customer success, and what metrics are most critical?	<input type="checkbox"/>	
	What key processes and workflows need to be operationalized within the CSP to enhance the customer journey?	<input type="checkbox"/>	
	What specific obstacles are preventing you from reaching your current customer success goals?	<input type="checkbox"/>	
	How do these challenges impact your overall customer experience and business outcomes?	<input type="checkbox"/>	
<b>Data</b>	What essential data sources are required for successful data integration for your CSP?	<input type="checkbox"/>	
	Do your data sources share common identifiers?	<input type="checkbox"/>	
	If applicable, what specific data points need to be transferred when migrating from one customer success solution (CSP) to another?	<input type="checkbox"/>	
	What critical data needs to be in place on the first day of system use? What should be included in your initial data migration?	<input type="checkbox"/>	
	If you're looking to bring in revenue data, do you have one place where you keep contracts with start and end dates?	<input type="checkbox"/>	
	Do you have product usage data available and ready for integration?	<input type="checkbox"/>	

Topic	Questions	Completed	Notes
<b>Resources &amp; Responsibilities</b>	Change Agent: Who will champion the implementation of the CSP and ensure team alignment and adoption?	<input type="checkbox"/>	
	Decision Maker: Who will have the final say on the strategic direction and design of the CSP?	<input type="checkbox"/>	
	Operations: Who will oversee the technical implementation and ensure it aligns with the strategic design?	<input type="checkbox"/>	
	Data Integration: Who will manage the integration of existing data systems with the new CSP?	<input type="checkbox"/>	
	End Users: What roles within your organization will interact with the CSP daily?	<input type="checkbox"/>	
<b>Change Management</b>	How does the Customer Success team feel about the current technology stack?	<input type="checkbox"/>	
	What specific benefits and improvements will the new CSP bring to the team's daily operations?	<input type="checkbox"/>	
	What support and resources will be available to your team during and after the implementation of the CSP?	<input type="checkbox"/>	
	What strategies will you use to ensure consistent and effective communication with the team throughout the implementation process?	<input type="checkbox"/>	

Topic	Questions	Completed	Notes
<b>Training &amp; Enablement</b>	Who will be responsible for developing and delivering the training program for the CSP?	<input type="checkbox"/>	
	What essential tasks must team members be proficient in to effectively use the CSP immediately?	<input type="checkbox"/>	
	What specific tools and resources will be utilized to support the training and enablement process?	<input type="checkbox"/>	