

Vendor Evaluation Checklist

Choosing the right Customer Experience Intelligence vendor can be challenging. This template outlines key criteria to help you evaluate and compare vendors effectively, ensuring you select a solution that fits your business needs.

Feedback unification capabilities

ASK THIS TO YOUR VENDOR	DECISION CRITERIA	
Which feedback data sources can I connect?	Choose a solution that can manage multiple customer feedback sources - surveys, support tickets, review sites, social media, and voice calls - and easily integrate internal data from your CRM or data warehouse.	☐
How difficult is to add new integrations?	The best providers make adding new integrations easy - choose the one that is open to building custom ones on request if there's a clear need.	☐
Can you customize pre-built integrations to suit our needs?	When evaluating a provider, look for one that allows customization of pre-built integrations - ideally, they should let you map and filter the data to fit your workflows. This flexibility is key to making the analysis meaningful and aligned with how your team operates.	☐

FEEDBACK UNIFICATION CAPABILITIES

ASK THIS TO YOUR VENDOR	DECISION CRITERIA	
Which languages does the platform support for detection and translation?	If your business operates in multiple regions, you'll need a system that can accurately detect and translate feedback in all relevant languages.	☐
Does your platform support API integration?	Seek a solution that offers API connectivity, allowing you to tie in to your wider technology ecosystem and automate workflows. This includes importing feedback into the platform from diverse sources, and sending analyzed data and insights directly to internal systems such as data warehouses and BI platforms.	☐
Can the platform unify feedback from all sources into one aggregated view?	Choose a solution that allows to combine all feedback into one view - so you can track trends across touchpoints and compare data from different sources with ease.	☐
Can the platform link feedback to our customer data?	Look for a solution that lets you enrich feedback with metadata such as customer ID, country, SKU, or transactional details. This context makes analysis more precise and allows teams to slice the data in meaningful ways.	☐
Can the platform automatically filter out low-value or duplicate feedback?	Ensure your solution can filter out irrelevant or low-value data - such as greetings and unrelated chatter - and eliminate duplicate entries to keep results accurate.	☐
How do you handle and anonymize PII in feedback data?	Always consider how vendors handle personally identifiable information (PII). Ensure that sensitive data, like phone numbers or credit card details, is anonymized or removed when necessary.	☐

AI capabilities

ASK THIS TO YOUR VENDOR	DECISION CRITERIA	
How do you ensure the taxonomy is tailored and stays relevant to our business?	Choose a solution that customizes the taxonomy for your specific datasets, tagging feedback with themes unique to your products and services, not just broad industry terms.	☐
How do you know what's the most important?	Evaluate whether your solution's theme structure offers multiple levels of detail - from broad categories to specific themes - so you can easily switch between a high-level overview and in-depth analysis.	☐
How does the platform capture context and sentiment, not just keywords?	Choose tools that analyze conceptual themes instead of just keywords or mentions. While keywords show how often a specific word like "bug" appears, conceptual themes group related feedback to reveal the underlying issue, such as "app reliability problems" or "frustration with app crashes." This provides a deeper, more accurate understanding of customer feedback.	☐
How do you track emerging themes?	Look for a solution that gives you the flexibility to track the themes that matter most to you. To do this, it should tag 100% of your data without missing any feedback and let you choose which themes to focus on.	☐
Can we edit the taxonomy and add new themes?	Ask if you can customize the taxonomy and themes. Since you know your product best and priorities evolve, the platform of your choice needs to be flexible and adaptable.	☐
How do you handle sentiment analysis?	Look for a solution that detects both negative and positive sentiment in customer feedback, helping to understand the holistic overview of the customer experience.	☐
Can your solution tag multiple themes to a single piece of feedback?	Look for a solution that can tag multiple themes to each piece of feedback. Limiting tags to one theme misses important details and results in incomplete, less accurate insights.	☐

AI CAPABILITIES

ASK THIS TO YOUR VENDOR	DECISION CRITERIA	
Will you tag 100% of our data?	Choose a solution that allows you to tag 100% of your data, ensuring there is not a single piece of customer feedback that remains ignored.	☐
Will we need to manually update or maintain the theme structure?	Make sure the platform can operate autonomously without the need for regular updates or ongoing maintenance - it reduces the total cost of ownership, while providing consistent and reliable results you can trust.	☐
What if our customers start using different words and phrases - will the AI still understand and tag the feedback accurately?	Choose a solution that goes beyond fixed lexicons and rule-based systems. Look for intelligent platforms that can understand new words and phrases, learning concepts on their own to accurately analyze evolving customer feedback.	☐

Reporting capabilities

ASK THIS TO YOUR VENDOR	DECISION CRITERIA	
What metrics does the platform support?	Make sure that the platform supports the analysis of diverse metrics - NPS, CSAT, net sentiment, sentiment distribution, positivity and negativity indexes - and lets you include your own internal business metrics.	☐
Can users filter and segment data by dimensions such as customer demographics, products, transaction history, or lifetime value to build custom reports?	Find a platform that allows you to filter and segment data with multiple breakdown layers, creating tailored reports that answer your specific business questions. The solution should include metadata capabilities and provide an easy-to-use interface for dimensional analysis.	☐
Can I compare different time periods or customer segments?	Look for a solution that allows you to compare data across user segments, geographic locations, and time periods to quickly analyze performance across different markets or customer groups.	☐
Can your platform track historical trends and benchmark current results against past periods?	Ensure the vendor retains historical data for a significant period and supports time-series analysis to track changes over time and enable benchmarking against past periods.	☐
How can I connect feedback analysis to business outcomes?	Ensure your vendor offers the expertise and product capabilities needed to support key use cases such as NPS analysis, product returns, retention, product feedback, and share of wallet. This should include custom dashboards, reports, and alerts tailored to each use case.	☐
Can I identify which themes impact positively or negatively our key metrics?	Choose a solution that helps you understand how different themes affect your key metrics. By ranking issues by priority, your team will be able to focus its efforts on the initiatives that will deliver the greatest impact.	☐
In what ways can I prioritize actions e.g for product roadmap planning?	Check whether the provider can rank issues by impact, volume, or severity to help you clearly identify what to address first and how to prioritize going forward.	☐

ASK THIS TO YOUR VENDOR	DECISION CRITERIA	
How can I identify and prioritize the biggest customer issues?	Choose a solution that provides a clear list of your biggest customer issues - quantified by volume and impact. It should offer granular, actionable insights that let you prioritize what to address next without needing to analyze feedback manually.	☐
Can I link insights directly to user quotes, with easy drill-down to full original comments, posts, or reviews?	Ensure the solution supports each insight with direct customer quotes to provide context and build trust, and that users can easily access the full original feedback within the platform from the analytics with just one or two clicks.	☐
Can I get a summary of the key findings?	A cutting-edge AI solution will be able to provide accurate, context-rich summaries of feedback - saving time and helping you quickly understand the key issues without reading full transcripts.	☐
Are the dashboards and reports easy to configure and use?	Look for a solution that lets you build customizable dashboards - with filters, time ranges, comparisons, annotations, and GPT summaries - so different teams can easily access and understand the insights that matter to them.	☐
Is the dashboard creation process simple enough for all team members to use?	Choose a solution that's intuitive and easy for everyone in your organization to use. Make sure creating and managing reports or dashboards, adding widgets, and filtering data is simple. Features like templates and quick summaries are especially helpful for beginners.	☐

Collaboration & sharing capabilities

ASK THIS TO YOUR VENDOR	DECISION CRITERIA	
Can I send reports and dashboards via email and Slack?	Check if you can assign different team members to receive relevant reports via email or Slack. Also, see if the tool offers notifications for changes in themes, emerging topics, or anomalies in your data.	☐
Can I share reports and dashboards outside of my organization?	If you work closely with third-party providers, look for a solution that lets you share specific reports or dashboards with them - without requiring a full platform login.	☐
Can the platform create tickets from critical feedback automatically?	If you work closely with Engineering, look for a solution that can automatically create tasks or tickets when critical bugs or product issues are flagged in customer feedback - this helps ensure nothing falls through the cracks.	☐
Can I export analyzed data?	Make sure the solution lets you export analyzed data to formats like PDF, CSV, or access it via API.	☐
Can the platform send alerts automatically when it detects anomalies?	Check if your solution can trigger alerts when the algorithm detects anomalies - values that fall far outside the usual range in your data.	☐
How many users can I add?	Look for vendors that don't charge per seat, so everyone in your organization can access the platform without extra fees.	☐

Enterprise readiness

ASK THIS TO YOUR VENDOR	DECISION CRITERIA	
Do you support Single Sign-On (SSO)?	Check if the provider supports SSO setups, ensuring secure, streamlined login for users while simplifying access control and reducing password-related risks across your teams.	☐
Is Two-Factor Authentication (2FA) available to protect against unauthorized access?	Check if the vendor supports Two-Factor Authentication to add an extra layer of security, protecting your data from unauthorized access even if passwords are compromised.	☐
Can your platform automatically redact sensitive customer data?	Verify if the platform lets you automatically hide or remove sensitive information like names, phone numbers, or payment details from customer feedback to protect privacy and comply with data protection rules.	☐
How does your solution handle GDPR compliance?	Ensure your provider offers strong solutions to meet GDPR rules, including automatically removing personal data (PII) and handling requests to delete customer information.	☐
What measures do you have in place to ensure data security and privacy?	Make sure the vendor holds SOC 2 type II certification and complies with ISO 27001 standards to ensure strong security practices for enterprise software.	☐
Is my data used to train the AI?	Make sure the vendor's AI training approach aligns with your company's policies or can be adapted to meet them.	☐

Operationalization

ASK THIS TO YOUR VENDOR	DECISION CRITERIA	
Can you help identify our gaps and build a clear improvement plan?	Choose a vendor that can conduct a comprehensive CX maturity assessment and provide a detailed report outlining your current strengths, weaknesses, and any barriers to progress. They should also help you define customized KPIs that are directly tied to your core business metrics and develop a clear, tailored roadmap to help you move forward.	☐
How will you help us operationalize our use cases?	Look for a partner who can turn your strategy into a clear, actionable plan. They should align with your business goals, help prioritize high-impact use cases, recommend the right data sources, ensure accurate analysis, support cross-team sharing, drive action, and help you measure impact.	☐
Can we count on your help with tailoring dashboards and reports to our use cases?	Make sure they offer hands-on help customizing dashboards, adding relevant metadata, setting up the right segments and filters, and tailoring reports and alerts to fit every team and use case - so insights are clear, actionable, and truly useful across your organization.	☐
What support do you offer to improve our data collection strategy?	Choose a provider who truly understands your feedback challenges and can help improve your data collection process. They should be able to conduct touchpoint gaps analysis, assist in designing effective surveys, and ensure the data you gather is accurate, comprehensive, and aligned with your key business questions.	☐
What types of consulting do you offer to help ensure our program's success?	Choose partners that offer a range of expert resources, including 1:1 consultations, in-person deep dives or team workshops designed to help you get the most from your program.	☐
Do you offer bespoke reporting on demand?	Look for a vendor with a dedicated insights team that offers tailored, deep-dive analyses on demand - helping you uncover hidden trends, risks, and opportunities beyond what your internal team can spot.	☐

ASK THIS TO YOUR VENDOR	DECISION CRITERIA	
How fast can you onboard our team?	Choose a vendor with a proven onboarding process that gets your team up and running within weeks - not months. They should provide clear timelines, a dedicated onboarding specialist, and thorough training to ensure quick and effective platform adoption.	☐
What support resources are included in the contract?	Look for a provider that assigns a dedicated Customer Success Manager who understands your goals and acts as a strategic advisor. You should also have access to technical experts who can support custom integrations, AI model understanding, or taxonomy management.	☐
Do you offer on-demand training and platform certification?	Choose a provider that offers a mix of in-person training, on-demand courses, and certification programs to support self-paced learning. This approach helps drive adoption across teams, empowering all users to confidently leverage the platform and ensuring sustainable, long-term success.	☐

About Chattermill

Chattermill, the Customer Experience Intelligence company, enables leading brands to unlock their customers' reality. Global enterprises like Amazon, H&M, and Uber rely on Chattermill to operationalize CX data. Chattermill is the best-in-class AI-powered platform for CX, Product, Marketing, and Support teams to action insights from their customer data at scale, ranked no.1 in multiple G2 categories.

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