Review your current license and contract with your CX partner.

Evaluate whether you need to upgrade (or downgrade) your software pricing tier based on how much you use it, your needed functionality, and the size of your team.

Analyze your CX solution’s close competitors to see how they compare on pricing and features.

Review the support interactions you’ve exchanged with your vendor over the past year (or however long your term has been).

Consider your brand’s long-term plans for CX and whether your current partner offers scalability.

Outline some potential negotiation points for the renewal process.

In order, rate the following in terms of priority to you: Price (Cost), Product (Current Needs / Future Innovation), and Partnerships (Support, Guidance, and Events).

Now rate your current CX system in order of what benefits you are currently receiving most to least.

Now rate your ideal CX system the same way. Is it the same order? If not, what has changed? Why? If it has changed, that may be a reason to compare another CX platform with yours.