

# The Ultimate CX Software Renewal Checklist

- 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.