

The CX Platform Evaluation Scorecard

Move beyond the demo. Rate your top vendors on the capabilities that drive operational success.



Instructions: Rate each vendor on a scale of 1 (Poor) to 5 (Excellent). Tally the totals at the bottom to see which platform aligns best with your business goals.

Criteria & Key Question	Vendor 1	Vendor 2	Vendor 3
Omnichannel workflow Can customers easily move between channels (e.g., chat to voice) without friction or context loss?	■ ■ ■ ■ ■	■ ■ ■ ■ ■	■ ■ ■ ■ ■
Unified customer view Does the platform accurately match customer identity across channels and show a single history?	■ ■ ■ ■ ■	■ ■ ■ ■ ■	■ ■ ■ ■ ■
Routing & call handling How sophisticated are the queuing, skills-based routing, and callback rules?	■ ■ ■ ■ ■	■ ■ ■ ■ ■	■ ■ ■ ■ ■
Automation depth Is automation (tagging, workflows, bots) easy to configure without engineering help?	■ ■ ■ ■ ■	■ ■ ■ ■ ■	■ ■ ■ ■ ■
Reporting & analytics Can you easily customize reports to see the metrics that matter to your KPIs?	■ ■ ■ ■ ■	■ ■ ■ ■ ■	■ ■ ■ ■ ■
Integration ecosystem Does it connect cleanly with your CRM and backend systems (API quality)?	■ ■ ■ ■ ■	■ ■ ■ ■ ■	■ ■ ■ ■ ■
Usability & admin Is the agent interface intuitive? Is the admin burden low?	■ ■ ■ ■ ■	■ ■ ■ ■ ■	■ ■ ■ ■ ■
Reliability & support What is their uptime track record and reputation for implementation support?	■ ■ ■ ■ ■	■ ■ ■ ■ ■	■ ■ ■ ■ ■
Total Score	/40	/40	/40

Pro Tip: Prioritize these categories based on your goals. If you're voice-heavy, weigh "Routing & Call Handling" higher than other categories.