



[TOOL]

# THE ULTIMATE RFP TEMPLATE FOR YOUR VoC PROJECT

Every requirement  
you need to consider

Critizr.



# WHY?

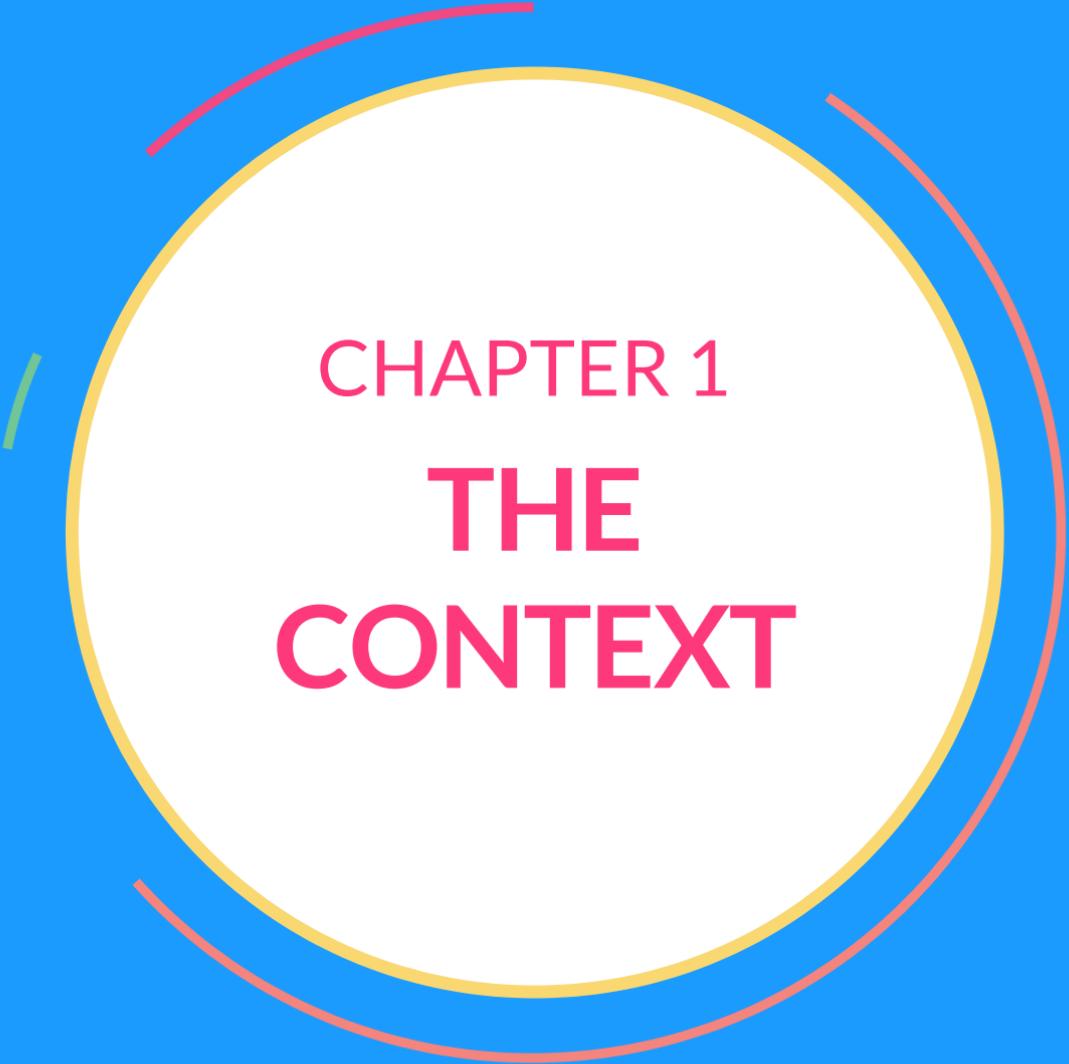
## *A brief introduction:*

This document aims to simplify the design of an RFP for a customer satisfaction project. With this tool, you're sure to tick every box and provide you future provider with all the key information they'll need.

A well-written RFP means that unpleasant surprises from a technical, functional, budgetary or planning perspective will be avoided.

With this model, we're hoping to help you:

- Structure your requirements;
- Enable candidates to understand your expectations;
- Receive detailed and customised offers;
- Avoid having to repeat the same information to different vendors;
- Compare offers in a coherent way;
- Lay out the project in advance in terms of deadlines, tasks, deliverables etc.



CHAPTER 1

**THE  
CONTEXT**

# 1. THE CONTEXT

This part is all about your company.

## A. ADMINISTRATIVE INFORMATION

In your RFP introduction, include the administrative information that vendors will need to respond to the RFP.

### THE COMPANY

Name of the company:

Headquarters - Street Address / City / Post Code / Country:

Additional Address - Street Address / City / Post Code / Country:

Telephone / Fax:

Legal status:

Trade Registry number:

Company Register number:

VAT number:

### - COMPANY CONTACTS

#### Contact 1

First name - Surname:

Direct phone number:

Mobile phone number:

Role:

Email:

#### Contact 2

First name - Surname:

Direct phone number:

Mobile phone number:

Role:

Email:

#### Contact 3

First name - Surname:

Direct phone number:

Mobile phone number:

Role:

Email:

## B. ABOUT THE COMPANY

### - ACTIVITY

Business sector:

Your distribution model:

URL of your website(s):

### - HISTORY OF THE COMPANY

Give a few lines about the history of your company/group/

### - KEY FIGURES

Revenue:

Number of employees:

### - GEOGRAPHICAL PRESENCE

Give as much detail as possible about your organisation.

Regional:

National:

International:

Number of retail outlets:

Merchant website:

### - RETAIL NETWORK TYPE

Give information on the different types of stores and the number of retail outlets per type. If growth is expected, outline your development strategy for the next few years.

	Number of retail outlets
Integrated	
Franchised	
Cooperative	

### - COMPANY BRANDS

If necessary.

## C. YOUR COMPANY'S STRATEGIC OBJECTIVES

Help the vendor better understand your company so that they can provide you with the most suitable response. See a list of examples below. You can rank them by priority if they are going to happen over time

	Priority 1 < DATE>	Priority 2 < DATE>	Priority 3 < DATE>
<b>Customer relationships</b> Identify and win back dissatisfied customers/prospects			
<b>CRM &amp; Marketing</b> Boost your customer knowledge and marketing performance			
<b>Online reputation</b> Capitalise on customer satisfaction			
<b>Management</b> Strengthen your distribution network's efficiency			
<b>Customer experience</b> Analyse and improve your customer experience			

## D. THE OPERATIONAL OBJECTIVES OF THE APPROACH

Just as with the strategic objectives, list the operational objectives along with current and expected KPIs as well as the pace.

<b>Customer relationships</b> Identify and win back dissatisfied customers/prospects	<ul style="list-style-type: none"> <li>○ Improve customer satisfaction by instigating a dialogue at all levels of the company</li> <li>○ Be identified as a customer satisfaction benchmark</li> <li>○ Be able to measure customer satisfaction throughout the purchasing process</li> <li>○ Identify dissatisfied customers and win them back</li> </ul>
<b>CRM &amp; Marketing</b> Boost your customer knowledge and marketing performance	<ul style="list-style-type: none"> <li>○ Capitalise on collected data to fine-tune marketing campaigns and boost interaction</li> <li>○ Enable satisfied customers to share their positive experience with others</li> </ul>
<b>Online reputation</b> Capitalise on customer satisfaction	<ul style="list-style-type: none"> <li>○ Highlight local online reputation: retail outlet referencing, promoting reviews on local sites</li> <li>○ Amplify the customer's voice across your digital platforms</li> </ul>
<b>Management</b> Strengthen your distribution network's efficiency	<ul style="list-style-type: none"> <li>○ Guide teams with localised data</li> <li>○ Use customer satisfaction levels as a management tool</li> <li>○ Identify the strengths and weaknesses within your network</li> </ul>
<b>Customer experience</b> Analyse and improve your customer experience	<ul style="list-style-type: none"> <li>○ Measure the customer experience in real-time, continuous and multi-channel ways</li> <li>○ Boost revenue by using your customer knowledge</li> <li>○ Implement and follow KPIs that monitor customer satisfaction</li> <li>○ Measure and monitor the NPS</li> <li>○ Identify sources of dissatisfaction and provide actionable data</li> </ul>

Add the relevant departments:

	Yes / No	What deadline? (time 1 / time 2)
Integrated retail outlets		
Franchised/cooperative retail outlets		
Customer Service		
Online retail service		

## E. THE INTERNAL ECOSYSTEM

A focus on customer satisfaction should be company wide. Therefore, various stakeholders will need to be brought in to work on the project. Identify who you want to involve well in advance as well as how early in the process you want to involve them.

### - DEPARTMENTS

	Yes / No
Marketing	
Digital	
Market research	
Customer Relationships	
Customer Service	
Voice of the customer	

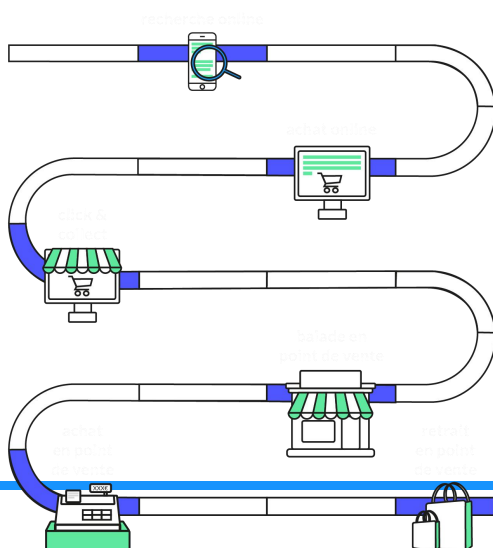
	Yes / No
Sales	
Communication	
HR	
Quality	
IT	
Purchasing	

### - YOUR CONTACTS AND THEIR OBJECTIVES

List the profile of the contacts from each department, their role, goals and objectives.

Example:

Service	Profile	Mission	Objectives
Marketing	Management		



## F. THE CUSTOMER JOURNEY

Describes in detail the customer journey(s) and the touchpoints you have identified.

Some examples:

- Online research via mobile
- Desktop research
- Online purchase

- Click and collect
- Visit a store
- Purchase
- Collection of goods

Key moments when you'd like to analyse the customer experience should be adapted depending on your organisation, business sector, company etc.

At a retail outlet	Via online store	With customer service
Web search: Find the required information on the store	Web search: land on the website	Finding contact information
Selecting the product	Selecting the product	Means of contact
Cleanliness	Research	Reasons for contact
Check out waiting time	Orientation	Response time per contact type (phone/email/chat etc.)
Welcome	Readability of the offer	Processing time
Payment process	The end of the payment process	Welcome
Product collection	Specific booking pages	
Click and collect	Researching delivery locations	
Online workshop booking	Information about the order	
Signage at a retail outlet	Delivery	
Signage on special offers	Click and collect	
Workshop experience		



# CHAPTER 2

# THE

# PROJECT

## 2. THE CUSTOMER SATISFACTION PROJECT

This part is all about your company.  
Here is an example list of objectives and problems.

### COLLECT

- instantly
- multichannel
- continuously
- with simple surveys that are adapted to the relevant aspect of the customer experience and that are integrated into your ecosystem
- regarding the customer experience

### DISCUSS

- feedback should be handled by the most relevant person (someone local for retail / the online sales team for e-commerce etc.)

### MEASURE

- in real time
- highly granular: from the retail outlet, to the region, to e-commerce, customer service and the franchise
- usable data thanks to authentication from consumers

### SHOWCASE

- the customer's voice throughout the company
- the process with trusted third parties
- the level of attentiveness towards and customer satisfaction among prospects
- ambassador customers by letting them voice their positive experiences

## A. THE PROBLEM

Outline your problem in a few sentences.

## B. YOUR EXPECTATIONS

Describe your expectations and relevant follow-up required for this project in a few sentences

## C. YOUR OBJECTIVES

There may be several objectives to your project. Detail the project scope.

## D. THE PLAN IN PLACE

Describe how you are currently organised in as much detail as possible. Don't forget to provide details of your specific operations (retail / web + retail / web / web + customer service etc.).

### - MYSTERY SHOPPING

Service provider:

Start date:

Who / What / When / Frequency / Comment:

Do you wish to continue?

Would you like to see more developments?

### - ONLINE SURVEYS

Service provider:

Start date:

Who / What / When / Frequency / Comment:

Do you wish to continue?

### - PHONE SURVEYS

Service provider:

Start date:

Who / What / When / Frequency / Comment:

Do you wish to continue?

### - SURVEYS AT A RETAIL OUTLET

Service provider:

Start date:

Who / What / When / Frequency / Comment:

Do you wish to continue?

## E. THE PROJECT SCOPE

### - CUSTOMER EXPERIENCE TOUCHPOINTS

Customer experience happens in your retail outlets as well as online or even when customers contact your customer service team. To get the best customer experience insights, we recommend looking at feedback across all aspects of the experience.

Retail outlets	
Online retail service	
Customer Service	

### - TYPE

B2B

B2C

B2B2C

### - TYPE OF “CUSTOMER”

What type of customer do you want to survey? Only keep those that you want to reach out to in the list.

Prospect

Non-buying customer

Customer

Partner

Consumer

Legal entity: business, school, charity etc.

Distributor

## F. COLLECTION CHANNELS

### - EXISTING PROCESS

Explain how you're doing it at the moment, what you would like to maintain or develop and why. Give the number of reviews you've gathered per source and type up until now.

For a retail outlet:

For Online retail:

For customer service:

### - EXPECTED PROCESS

For a retail outlet:

For Online retail:

For customer service:

### Additional platforms

List the platforms and your expectations in terms of collection frequency - weekly, real-time etc. Also indicate if you'd like to get reviews from all points of sale or just a selection. Find a non-exhaustive list below:

	Yes	No	Customisation needed	Comment
Google My Business				
TripAdvisor				
Facebook reviews				
Yellow Pages				
Bonial				
Tiendeo				
Critizr.com				
Other:				

### Your brand's online channels

To promote optimal use of customer feedback, think of two types of channel: solicited and unsolicited. For example, you can reach out to your customers by sending them an post purchase email but you can also leave it up to your customers to leave a review by including a link in your newsletter or on the website. Also remember that by using targeted channels, you can reach another category of customers, such as non-buying or non-loyalty-card holders.

	Yes	No	Customisation needed	Comment
Website				
Website - retail outlet's local page				
eCommerce site				
Mobile app				
Email				
Newsletter				
Text				
Facebook Messenger				
Community or customer chat service				
Other:				

### The chain's in-store channels

	Yes	No	Customisation needed	Comment
POS (detail your expectations: QR code, key word SMS, conversational SMS, redirection to your website, etc.)				
Receipt				
Interactive display				
Wi-Fi				
Other:				

### - VOLUME

If you have a fixed idea, give the exact number of ratings or reviews you would like to have per month and/or if you'd like a minimum number of ratings per point of sale to have optimal representation.

### - FEATURES

#### Type of questions

	Yes	No	Comment
Rating out of 5			
Emojis			
Scale			
Free-flowing text (would you like to have a character limit?)			
Categorised verbatim			
NPS			
CSAT			
CES			
Multiple-choice questions			
Subsidiary questions			
Yes / No			
Other:			

### Usability & Design

Ensure that the survey usability is optimised to maximise the completion rate. Don't forget to ask the supplier their average completion rate.

	Yes	No	Customisation needed	Comment
Responsive survey				
Customised survey design				
iOS integration				
Android integration				
Website integration				
Integrating the first survey question into an email and saving the response				

### Survey design

	Yes	No	Customisation needed	Comment
Possibility to introduce different surveys depending on the point of sale or purchasing process				
Customising the survey				

- o Is there a limited number of surveys? If so, how many?

### Posting reviews

Give details on the level of visibility you want for your reviews.

	Yes	No	Comment
On your website			
On other sites:			
Yellow Pages (reposting reviews)			
Google My Business (redirecting advertisers)			
TripAdvisor (redirecting advertisers)			
Other (give details):			

### Email routing

1/ Managed in-house

- o Name of the routing platform supplier
- o Is the data that triggers the email already available in the tool?

If not, interfacing with your checkout or other system to initiate after-sales or e-booking emails.

- o Supplier name
- o Ability to start sending emails via API

## 2/ You would like to entrust your future feedback management supplier with email routing

If you'd like the supplier to manage this, to ensure an optimal delivery rate, this service should be contracted out to experts. Feel free to ask for the supplier's name for reassurance's sake. Give information on any specific features that you require:

	Yes	No	Comment
Managing marketing pressure			
Customising the sender sub-domain			
Reminder			
How specific data is transmitted (saving a file on an SFTP or using an API)			
Other (give details):			

### Text r/ SMSouting

#### 1/ Managed in-house

- Name of the text routing service provider that you deal with

## 2/ You would like to entrust your future feedback management supplier with text routing

If you'd like the supplier to manage this, to ensure an optimal delivery rate, this service should be contracted out to experts. Feel free to ask for the supplier's name for reassurance's sake.

Give information on any specific features required and specify what instigated the routing process.

	Yes	No	Comment
Managing marketing pressure			
Customising the sender			
Reminder			
How specific data is transmitted (saving a file on an SFTP or using an API)			
Other (give details):			

### Limiting the number of verbatim collected

If you would like to cap the volume collected to maintain qualitative handling of them all by your teams, ask your service provider what sort of cap can be implemented.

	Yes	No	Comment
Per retail outlet			
Per day			
Per week			

## G. HANDLING REVIEWS

### - EXISTING PROCESS

Explain how you're doing it at the moment, what you would like to maintain or develop and why.

## - EXPECTED PROCESS

Depending on the scope of the first project (retail, e-commerce, customer service etc.), the most suitable people to respond to customers will vary. For example, if the satisfaction rate refers to the experience in a local store, the retail outlet managers and/or their teams will be the best people to respond to the customer. However, there may be a case where certain issues need to be addressed by support departments such as quality, health and safety or customer service for post-order e-commerce cases. Therefore, you should outline the desired approach.

Approaches	Who responds
LOCAL	Point of sale manager + deputy + department supervisor
CENTRALISED	Customer Service
MIXED	Handled by point of sale manager + unsatisfied customers dealt with by customer service

## - FEATURES

### Inbox

If cases are being handled locally, ensure that teams will respond quickly to voicemail. List all of the features you'd like to see.

	Yes	No	Customisation needed	Comment
Instant notification of a new review				
Possibility of moderation (before posting)				
Checking the review with details on questions/ratings/comments				
Categorising reviews				
Specific handling of unsatisfied reviews - possibility to pre-determine an action such as calling the customer				
Ability to delegate to customer service				
Transfer option (to a platform user or alternative) to provide an answer				
Sharing option (for a platform user or alternative)				
Possibility to add an internal message				
Possibility to add an attachment to the response				
Printing option				
Ability to have a single view of the customer				
Put on hold function				
Individual and automatic signature				

Default response option				
Voicemail available via iOS app				
Voicemail available via Android app				

### Follow up on review handling

	Yes	No	Customisation needed	Comment
Measuring response time				
Measuring response rate				
Measuring the quality of a review response				
Alert workflow if a negative review has not been handled				

## H. MEASUREMENT

### - KPIs

Which KPIs would you like to track?

	Yes	No	Comment
NPS score (recommendation score)			
CSAT score (satisfaction score)			
CES score (effort measurement score)			
Local team engagement score (indicator of how feedback is handled)			
Other:			

### - FREQUENCY

	Yes	No	Customisation needed	Comment
Would you like real-time visualisation?				
Time-frame: daily/weekly/monthly/per trimester/annual				
Customisable time-frame (date to date)				

## - DASHBOARDS

	Yes	No	Customisation needed	Comment
Centralise all KPIs on a page for a coherent visual.				

## - REPORTING

### Customisable based on criteria

	Yes	No	Customisation needed	Comment
<b>Geographic</b> Per retail outlet Regional National				
<b>Per user profile</b> Retail outlet manager Regional manager Digital Headquarters				

### Analysis breakdown

	Yes	No	Customisation needed	Comment
<b>Geographic</b> Per retail outlet Regional National				
<b>Per chain</b>				
<b>Per survey</b>				
<b>Per category NPS/CSAT</b>				
<b>Request type</b>				
<b>Or other (give details):</b>				

### Ranking/Comparison

What would you like to compare or rank? What kind of breakdown would you like?

### Statistical viewing filters

	Yes	No	Customisation needed	Comment
Average basket				
Purchase date				
RFM segment				
Period (historical depth)				
Other:				

## - ANALYSIS

Depending on the level of analysis and the desired frequency, ask the service provider what they can do themselves or via partners.

	Yes	No	Frequency	Comment
Representation analysis				
Data adjustment				
Satisfaction drivers				
Analysis based on transactional criteria cross-referenced with satisfaction indicators				
Other:				

### Text Mining

- Filter types
- What languages are supported

### Semantic analysis

- Integrated with which partners

### - FEATURES

### Export format

	Yes	No	Customisation needed	Comment
CSV				
XLS				
Print				
PDF				

## I. SHOWCASING REVIEWS

### - EXISTING PROCESS

If there's already a process in place, please describe it.

### - EXPECTED PROCESS

### Website

	Yes	No	Customisation needed	Comment
Highlighting your satisfaction score				
Highlighting your customer relationship score				
Highlighting interactions with your customers				
Other:				

### Rich Snippet (SERP)

Ask the service provider if they can boost the ranking of information on your website.

	Yes	No	Customisation needed	Comment
Rich snippets of each point of sale or store locator				

### Third-party websites

List third-party websites where you'd like your reviews to appear more and the ideal update frequency.

	Yes	No	Customisation needed	Comment
Yellow Pages				
Google My Business				
Yellow Pages				
TripAdvisor				
Facebook Reviews				
Other:				

## J. ACCESS TO THE PLATFORM

### - WHICH METHOD

- Online back office
- Mobile app (Android/iOS)

### - MANAGING PERMISSIONS

Features

	Yes	No	Customisation needed	Comment
Read only				
Response				
Moderation				
Custom access per profile - Breakdown				

### Configuring accounts

Indicate what profile types and which resources should have access to your partners.

- Which profiles can access the back office?
- How many points of sale can a user access?
- How will the user be able to connect (devices, browsers)?

	Scope	Methods	Comment
Description of profile 1			
Description of profile 2			
...			

### - SUPPORTED LANGUAGES

Indicate what languages you need for the back office.

### - SSO

If you have a large number of points of sale and as such, users, Single Sign On (SSO) could really simplify access to the platform. Ask the service provider if they can implement it and under what circumstances.

**NB: SSO is very useful for the following instances:**

- 1/ Manage access rights to the service provider's platform independently
- 2/ Enable automatic updates of the scope of user access to the platform

The current standard is version 2 of SAML.

	Yes	No	Customisation needed	Comment
SSO				

## K. INTEGRATION WITH THIRD-PARTY SYSTEMS

### - THE BRAND'S WEBSITE

List everything that you would like to see appear on your website and ask the service provider to give details on the technology used and how easy it is to implement.

	Yes	No	Customisation needed	Comment
Location of the feedback form				
Posting ratings as a score from 1-5 or stars				
Posting reviews				
Displaying rich snippets on each point of sale's page				

### - WEB BROWSERS USED

Indicate the web browser and version utilised by future users of the interface (response + consultation)

### - CRM / DATA LAKE / RCU

Ask the service provider if they already have an integration for the system you use. Feel free to provide details if you have several service providers.

- Name of your software:
- Or proprietary technology:
- What information:
- Should the information be descending or ascending?

Example:

Descending > adding the customer profile to the feedback management interface to adapt the response

Ascending > enriching your CRM with the NPS or other data from feedback-providing customers to enhance your customer knowledge

### - CUSTOMER SERVICE PLATFORM

Ask the service provider if they already have an integration for the system you use. Feel free to provide details if you have several service providers.

- Name of your software:
- Or proprietary technology:
- What information:
- Should the information be descending or ascending?

### - SEMANTIC ANALYSIS

Ask the service provider if they already have an integration for the system you use.

You aren't working with a service provider yet but you'd like to start? Just say so in order to get recommendations.

Name of your software:

Desired frequency of analysis:

### - API

Ask the service provider what kind of API can be implemented.

Some service providers will have technical documentation or an interface contract that can be sent to your IT management team.

If you already have an API, give details on its main functions.

	Yes	No	Comment
API			
If yes:			
Gather the list of data collected to enhance your information system (CRM profile, datalake)			
User admin: updating profiles and their scope			
Triggering email/text routing			

### - TECHNICAL CONSTRAINTS

Provide information on any constraints you have with operating systems, browsers or other.

## L. SUPPORT

The success of your project depends on selecting the right tools as well as good support during set-up and throughout the process. Don't underestimate this element.

## - FUNCTIONAL WORKSHOPS

Once you have chosen your service provider, the project will kick off. To do this, the best practice is to have different workshops so that needs can be outlined in a functional manner. Ask the service provider to give information on their process and what kind of workshops they host. Examples of workshop types.

## - TRAINING

Ask the service provider to describe how training is conducted per user type (headquarters, managerial roles, local teams, customer service, e-commerce etc.)

- Type:
  - Online
  - In person
- For whom
- Duration
- Output devices used

## - THE DOCUMENTATION

For project success, you'll need a certain number of resources: technical, educational etc. Ask the service provider what type of resources they'll provide (guides, webinars, white papers, blogs, sectoral reports etc.)

## - TEAM SETUP

Ask for a description of the selected organisation for the success of your project. Here is an example:

Onboarding project manager  
 Customer Success project manager  
 Local Success project manager  
 Technical Support  
 Data analyst

# M. DATA STORAGE AND SECURITY

## - STORAGE

State if you would like your data to be stored in France or in Europe and if you have specific constraints if data collection is desired in non-EU countries.

## - ENCRYPTING DATA

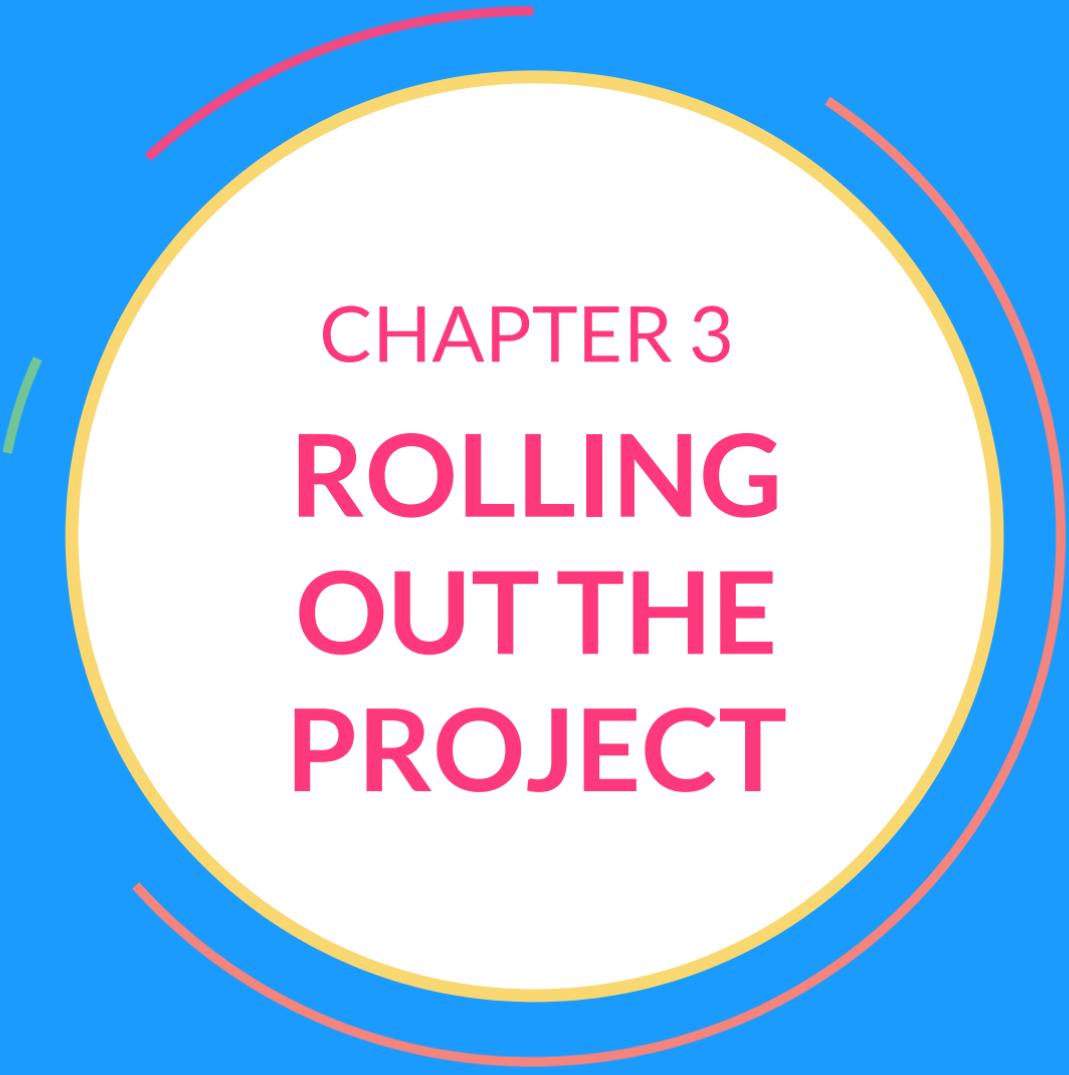
Encryption provides your system with additional security, mainly for protecting personal data in circulation.

There are two ways of using encryption in exchanges:

- 1/ Using an encrypted protocol by default such as HTTPS or SFTP
- 2/ By also encrypting personal data when required

## - GDPR

Ensure that your service provider is meeting all GDPR requirements.



CHAPTER 3

**ROLLING  
OUT THE  
PROJECT**

## 3. ROLLING OUT YOUR PROJECT

### A. INTERNAL RESOURCES

#### - THE PROJECT MANAGER

As with any project, having a project manager is key to its success. Another key element is that the project must be a company-wide effort and foster departmental cooperation (marketing, customer relationships, digital, sales, IT, operations etc.), your project manager should be recognised by all of these stakeholders.

First name:

Name:

Role:

Email:

Landline:

Mobile phone number:

Street Address / City / Post Code / Country:

#### - THE STEERING COMMITTEE

Choosing a steering committee is also very important. We strongly recommend involving someone from the store operations to understand their needs/constraints as well as assuring you of optimal commitment in the future.

- Who is involved in the steering committee?
- The role and responsibility of everyone in the project

### B. PLANNING

The aim is to give the service provider as much visibility as possible so they can organise themselves and provide you with the most customised and suitable response possible. Feel free to mention how many service providers will be short-listed.

Launch date of the RFP:

Questions/responses:

Response deadline:

Interview phase:

Short-list phase:

Second interview phase:

Final selection date:

Final contract signing date:

Deployment phase:

Training phase:

Go live date:

Incubation period:

## - RECOMMENDATIONS

Have you identified risk areas, or do you have questions? See the service provider as a partner who is there to assist you along the way.

## C. THE SELECTION

### - SERVICE PROVIDER SELECTION CRITERIA AND WEIGHTING PERCENTAGE

A few examples of selection criteria. Assign a weighting.

Example: budget 20% / technical 50%

Criteria	Weighting
Expertise in measuring satisfaction	
Models in the sector	
Assistance & methodology	
Understanding the request & proposed solution	
Usability of the interface	
Functionality of the interface	
The budget	

### - DECISION-MAKING PARTIES

State who will make the final decision.

- Steering committee
- Executive committee
- Management committee
- CEO

## D. RECEIVING APPLICATIONS

Response deadline:

Response format (give details):

- Email
- Post

Expected file format:

- PPT / Word / Excel / PDF
- Specific constraints:
  - limit on number of slides
  - possibility of adding videos (yes/no)

Interview process and preparation:

- Beforehand:

Will you provide a list of questions/answers?

Will an exhaustive presentation of the answer be sent?

Will all participants have knowledge of the answers provided?

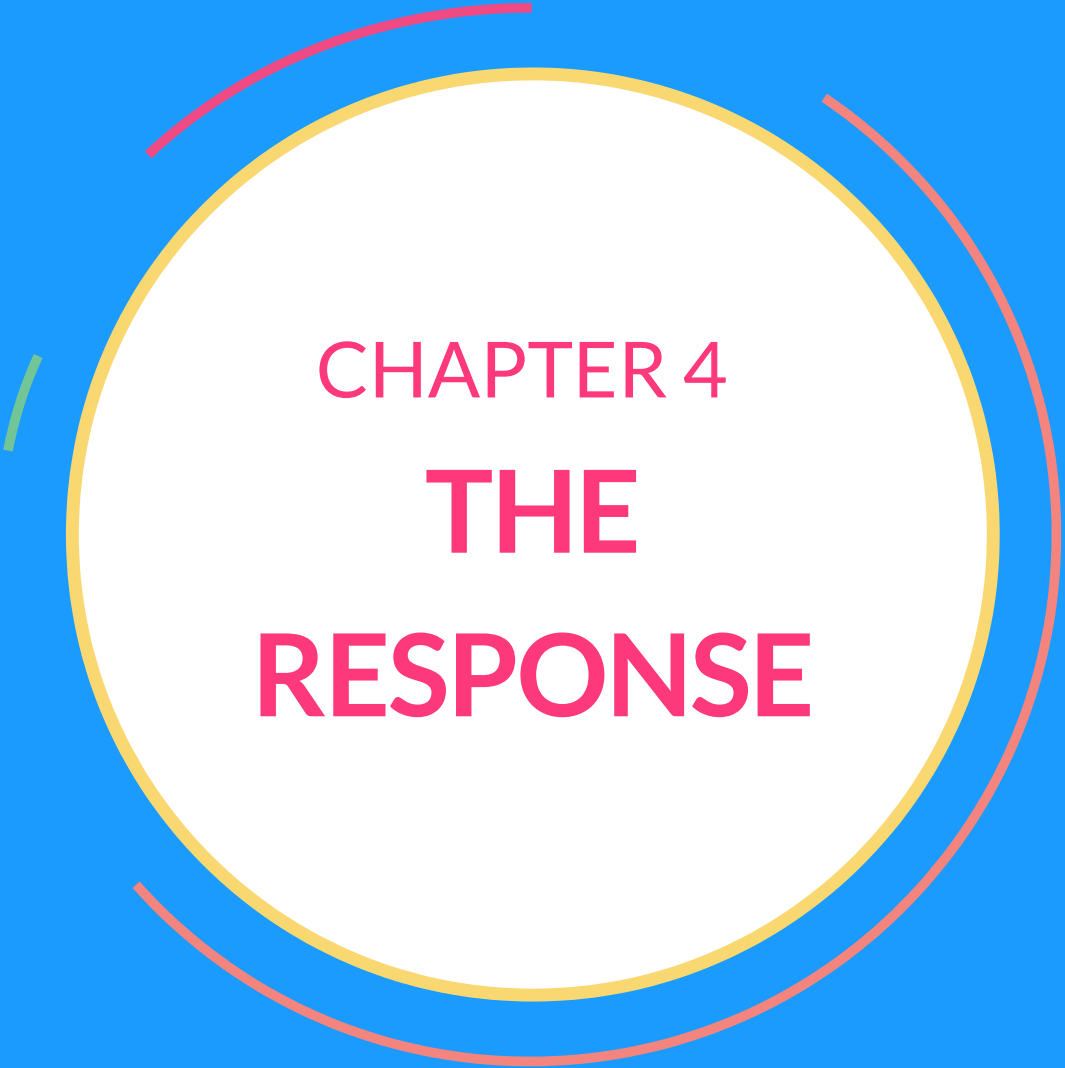
- Interview day

Expected duration?

Will you be expecting a live demonstration?

Example of a document to be fill out

Expected documents	Role of the people who will read the documents	When
Functional response	IT management team	Response
GDPR documentation		For the interview
Financial offer	Marketing Director and Digital Director	Response

A decorative graphic consisting of a large white circle with a yellow border, centered on a blue background. Two red arcs and one green arc are positioned around the white circle, creating a sense of motion or a stylized frame.

# CHAPTER 4

# THE

# RESPONSE

## 4. RESPONDING TO THE RFP

Don't forget, the more precise the information the better your chances will be of having a clear response and as such, responses that are easy to compare. For this part, the service provider will make their financial proposal.

### A. SOFTWARE EDITOR

Presentation of the company:

Key figures:

- Total number of staff
- Staff at R&D or a percentage
- Creation date
- Number of users worldwide
- ...

Geographical presence:

Countries where the solution is in use:

Member of a group or not:

### B. PRESENTATION OF THE PRODUCT

Name:

Position:

What makes it stand out:

- Functionality
- Assistance
- Expertise

Does the software offer additional modules that haven't been used as part of the project but that could be used at a later stage?

References to major clients involved in the project:

- Name of the group brands:
- Number of connected retail outlets:
- Issues that the solution addresses:
- Time to production:
- Collection channels used:
- Number of surveys:
- Type of feedback handling:
- Type of promotion:
- KPIs:
- Benefits gained:
- Is the client willing to provide a testimonial?

### C. THE ROLL-OUT PLAN

Ask the service provider to commit to roll-out milestones and give details at each stage.

	Dates
PHASE 1 - FUNCTIONAL SCOPE	
○ Give information on the workshops	
PHASE 2 - ROLL OUT	
○ Tool set-up	
○ Coordination with IS/IT management for integration	
○ Testing phase	
○ Training	
PHASE 3 - GO LIVE	
PHASE 4 - INCUBATION	

## - TRAINING

Ask for as much detail as possible.

Who	How (in person/online)	Duration	When
Headquarters			
Network management			
Retail outlets			

Material provided after training:

	Yes	No	Customisation needed	Comment
Video				
Written documentation				
E-learning portal				

## Possibility of additional assistance on specific areas.

Does your service provider have a training catalogue that will assist you throughout your project? We think that local training in order to get to grips with the results and turning them into action plans, or for headquarters on issues such as “how to really place the customer at the heart of my organisation?”.

## - ASSISTANCE THROUGHOUT

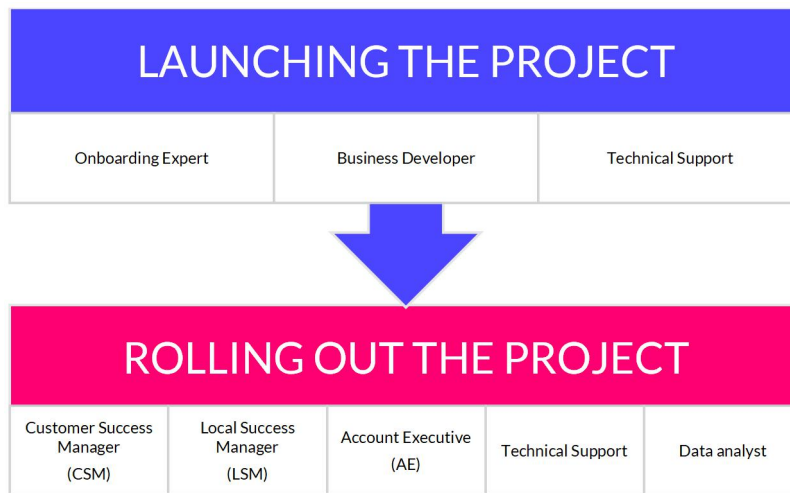
Naturally, assistance will evolve over time and your service provider will have to aid you as time goes on, not only to help you reach your objectives but also any future goals.

Here's an organisational example:

When starting, you'll still have the same sales contact (often known as business developer), in order to ensure that what you signed up for is what you're getting throughout the project.

On the other hand, when the project is rolled out, it is normal for this point of contact to change.

Ensure that you have a project manager assigned to headquarters but also to local sites. This is the difference between the Customer Success Manager (CSM) and the Local Success Manager (LSM)!



## - RECOMMENDATIONS

In terms of project issues, give the service provider an opportunity to give recommendations regarding roll out.

## - THE FINANCIAL OFFER

Ask for as much detail as possible so you can compare offers. Ask for details on whether the cost is per point of sale or per user, for example.

Here's a basic example:

<b>Service</b>	
Onboarding (number of workshops)	
Training (amount/time/type)	
Roll out (what)	
<b>Overall budget</b>	
<b>Licences</b>	
Collection channels	
Approaches	
Measurement and reporting	
Promotion channels	
Number of retail outlets	
<b>Monthly budget</b>	

## Investment table year 1 / year 2

## *About...*

Critizr is a technology company that draws on customer focus to allow businesses to measure and optimize consumer experience.

A trusted third party on customer relationships with its service between consumers and directors of points of sale, Critizr also has a platform for Customer Feedback Management, "Critizr for Business," which has allowed it to become a major player in Europe over the last several years. Critizr is a daily partner of headquarters and points of sale, and involves the entire company in a global approach to transform customer experience.

Critizr is used by the biggest brands in Europe such as Carrefour, Crédit Mutuel, Havas Voyages, Nocibé, Galeries Lafayette and Flunch. Critizr is available in 30 countries and aims to become the world leader in customer experience.



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