

Customer Engagement Platform (CEP) Self-Assessment

Introduction

Are you questioning whether it's time to switch Customer Engagement Platforms? Maybe you just need to tweak your current approach—or perhaps you're already operating at peak performance.

Built on over 10 years of industry experience working closely with marketers, this self-assessment is designed to help you evaluate your current strategy and identify opportunities to level up.

How to Use This Assessment

Step 1: Read through the statements and rate your agreement on a scale from 1 (Strongly Disagree) to 5 (Strongly Agree).

Step 2: Tally your total score once you've rated all of the statements. Refer to the "Scoring breakdown" to get a summary of your score.

Step 3: Refer to the "What your score means" section to understand your results and identify your next steps.





Step 1 - Statements

Read through these statements and rate your agreement on a scale from 1 (Strongly Disagree) to 5 (Strongly Agree).

Strategic impact and value	Score (1-5)
We consistently test, learn, and improve	
Personalization feels “real”. Not just {{FirstName}}	
We’re not overpaying for features we don’t use	
We feel the pricing matches the value we’re getting	
We’re valued as a customer by our CEP. They don’t treat us like we’re just a number	
We feel our CEP is honest and transparent, delivering on what they say is possible	
Day-to-day execution	Score (1-5)
Marketers can launch campaigns without engineering help	
Campaigns go live in days—not weeks	
Journeys and automations give us powerful tools to automate the customer journey	
We can confidently test how campaigns will appear to customers before sending them	
We can reach customers on the channels we want to	
Support is responsive when we need it	
Support is effective, going above-and-beyond to help us achieve our goals	
We’re confident our messages actually reach our customers’ inboxes and devices	
Customer and activity data	Score (1-5)
Our CEP integrates with all of the software, databases, APIs and other customer data sources we need it to	
We trust the data in our CEP	
Our engineering and data teams are supporters of the implementation approach needed by our CEP. They don’t complain about the way our vendor operates	
We can measure real outcomes—conversions, retention, LTV—not just clicks	
Total	

Step 2 - Scoring breakdown

Tally your total score. Read below for a quick breakdown of what your score indicates.

Score range	Interpretation	Summary
75-90	 Rock solid.	You've got a healthy, well-functioning CEP setup. Sounds like you've got the right platform and the right processes. You're doing a good job.
55-75	 Functional but frustrating.	This could go either way. Some of your pain may come from the platform but it's just as likely to be internal processes, team structure, or implementation debt.
35-55	 You're making it work... but it's hard.	You're compensating for your CEP more than benefitting from it. Could be time for an honest discussion.
<35	 SOS. Time to reassess.	Something's not working. It's probably not just you, it's the platform. Either way, you're being held back.

Step 3 - What your score means

Is it your CEP – or something else? Before you consider replacing your platform, take a step back. We're here to help you.

You might **not** need a new CEP. This assessment is geared to help you make an honest assessment, not drive you in the direction of unnecessary change. Sometimes the problem is how your team is using the platform, or the way it was implemented, or that you're asking it to do something it was never built for.

Other times, you'll be best to add other tools to your market stack. For example, adding a dedicated Customer Data Platform (CDP) is often a better choice than switching to a CEP that claims to have this functionality. CDPs can add huge potential for data collection, segmentation and personalisation.

But... sometimes it **is** your CEP. Especially if:

- You're paying for CDP-style features you're not using
- You want something leaner, more marketer-friendly
- You already have a CDP and want a CEP that plays nicely without overlap
- You're a B2B or PLG business being treated like an enterprise B2C

If that sounds like you, we'd be happy to walk you through what a leaner, more cost-effective CEP looks like, whether that's Vero, or just a better approach to your current setup.



Book a free discovery call with our team at

<https://www.getvero.com/demo>



Marketing automation platform for modern marketers



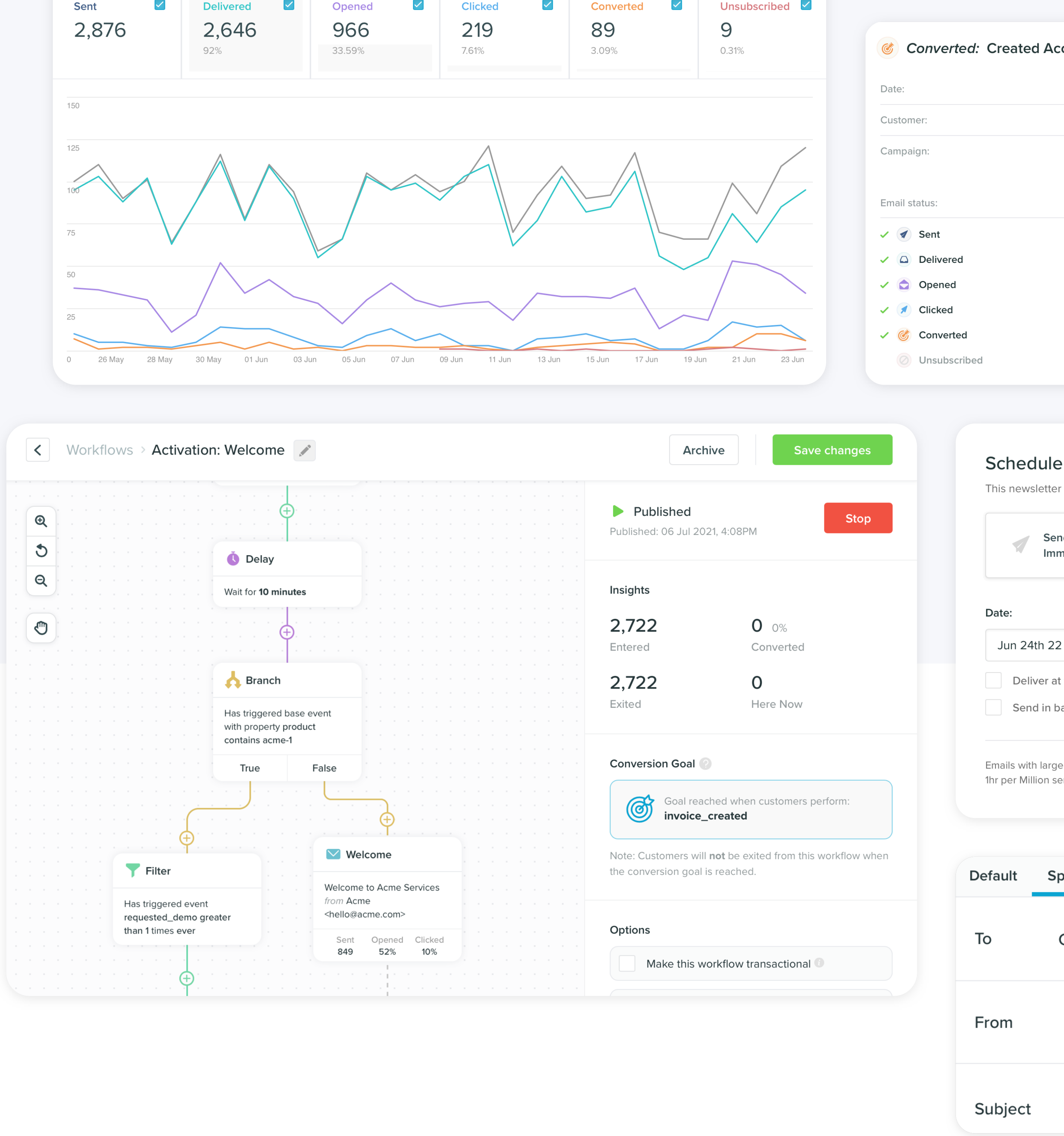
Pain points with your current CEP software?

- Pricing that doesn't align with your active subscriber base.
- Difficult to track customer activity.
- Difficult to make good use of customer demographic attributes and activity data to send personalised messages.
- Marketing team spends too much time and effort getting new campaigns live.
- Double-paying for both a CDP and CEP.
- Losing customers because it's hard to truly connect with them.

Why Vero?

With Vero, you can segment customers based on their attributes and activity, all of which is tracked in real-time. This lets you automate decisions and easily send messages across multiple channels.

Best of all, Vero's user-friendly interface makes it accessible to any marketer, so there is no need to let the complexity of modern marketing keep you from reaching your audience.



Explore Vero

Real-time activity tracking

Always keep track of what your customers do (and don't do) on both your site and in your product.

Advanced customer segmentation

Create, save and use dynamic groups of customers based on their attributes and web, product and email activity. This allows you to create truly personalized messages.

Usage-based pricing

Stop paying for inactive subscribers or "double paying" for overlapping CDP features (if you use a CDP). Vero's usage-based pricing is tailored for B2C and product-led B2B companies.

“Vero enables us to use real-time data to enrich our emails with relevant content to drive a higher ROI.”

Julien Catani - Head of CRM at Helloprint



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