

Customer Success Platform Comparison

Capability	Easy CS	Gainsight	Certinia	ChurnZero	Velaris	Vitaly	Totango
Success Plans	Basic, integrated with Salesforce, goal and initiative tracking	Advanced with CTAs and linked outcomes	Goal-driven plans with progress tracking	Collaborative plans, updated in real-time	Plans with progress tracking and internal collaboration	Collaborative plans, project-style workspaces	Journey-based goals linked to CS milestones
Health Scoring	Basic license and engagement-based scoring	Multi-input with AI churn prediction	Unified customer health dashboard	Predictive scoring based on usage and sentiment	Sentiment analysis and health scores	Real-time scorecards based on customer activity	Configurable real-time health monitoring
Task Automation	Manual task assignment and deadlines	Custom workflows and rule-based triggers	Automated flows with AI assistance	Automated Plays for lifecycle journeys	Workflow builder and playbooks	Automated workflows linked to events	Smart workflows triggered by behavior
Customer Collaboration	Voice of Customer only	Community features and goal alignment	Omnichannel communication and feedback	Shareable success plans with clients	Client portals and co-owned workspaces	Notion-style collaborative spaces	Collaborative tracking of shared customer goals
Analytics & Reporting	Basic reporting on usage and tasks	Custom dashboards and KPI tracking	Real-time dashboards and alerts	Detailed reporting with predictive insights	AI-powered reporting and data exports	Live dashboards and segmentation	Real-time reporting with health tracking
Salesforce Integration	Native, 100% inside Salesforce	Deep integration with Salesforce & CRMs	Built on Salesforce platform	Full support via Salesforce integrations	CRM integrations via API	HubSpot-native (limited Salesforce)	Salesforce and other CRM integrations
AI & Churn Prediction	Not available	AI for churn and upsell prediction	AI-driven insights on success	Churn prediction engine with AI	Sentiment & behavioral AI predictions	Not available	Predictive churn risk alerts

Key Highlights

- Easy CS: Best for companies using Salesforce that need a lightweight, natively integrated CS tool to structure plans, engagements, and feedback without added complexity.
- Gainsight: Enterprise-grade solution with deep analytics, AI, automation, and health scoring — ideal for mature CS teams.
- Certinia: Native to Salesforce with goal-oriented workflows and unified dashboards for CS, finance, and services.
- ChurnZero: Strong on journey automation and real-time visibility, great for high-velocity B2B SaaS.
- Velaris: Combines sentiment analytics with collaborative workspaces; strong on AI insights.
- Vitally: Streamlined and visual, focused on speed and clarity, best for startups and scaling CS teams.
- Totango: Flexible modular system with pre-built templates and customer journeys for quick deployment.