Customer Survey Template

Goals:

Examples

- Understand how customers first learn about "Company Name"
- Understand the most common platforms and media customers use
- Understand customer demographics
- Understand true differentiators compared to perceived differentiators for key messaging

Section 1: Your Relationship With "Company Name"
Please select the option that best fits you.

1. I am a current customer of "Company Name".
2. I am a past customer of "Company Name".
3. I have never been a customer of "Company Name".

<branching: A goes on, B & C are disqualified>

How long have you been a customer of "Company Name"?

- Less than 1 year
- 1 year
- 2 years
- 3 years
- 4 years
- 5 years
- 6 years
- 7 years
- 8 years
- 9 years
- 10 years or more

Of the following "Company Name" solutions, which solutions has your company utilized? (Select all that apply)

1. Solution/Product 1
2. Solution/Product 2
3. Solution/Product 3
4. Solution/Product 4
5. Other (please specify)
6. None of the above/I don't know

<Branching: those selecting F are disqualified>

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Which of the following "Company Name" solutions are you currently using?

<Design: answers should pre-populate based upon what was previously selected>

1. Solution/Product 1
2. Solution/Product 2
3. Solution/Product 3
4. Solution/Product 4
5. Other (please specify)

Section 2: Customer Journey

How much time per week do you spend on the following platforms?

<matrix: none, less than 1 hour, 1-2 hours, 3-4 hours, 5-6 hours, 8-9 hours, 10+ hours>

- Facebook
- Instagram
- LinkedIn
- Snapchat
- TikTok
- YouTube
- Twitter

<Awareness> When you first begin exploring solutions or products for your business, where do you go to find more information? (Select all that apply)

<randomize except last>

- Facebook
- Instagram
- LinkedIn
- Snapchat
- TikTok
- Twitter
- YouTube
- Third-party blogs
- Online reviews
- Search engine (i.e. Google, Bing, etc.)
- Company website
- Friends, family members or work colleagues
- Other (please specify)

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<Awareness> Think about the first time you learned about "Company Name". How did you become aware?

<randomize>

- Facebook
- Instagram
- LinkedIn
- Snapchat
- TikTok
- Twitter
- YouTube
- Third-party blogs
- Online reviews
- Search engine (i.e. Google, Bing, etc.)
- Company website
- Friends, family members or work colleagues
- Trade show
- Other (please specify)
- None of the above/I don't remember

<Consideration> When conducting initial research about companies that offer solutions and products for your business, where do you go to find more information about those companies? (Select all that apply)

<randomize except last>

- Facebook
- Instagram
- LinkedIn
- Snapchat
- TikTok
- Twitter
- YouTube
- Third-party blogs
- Online reviews
- Search engine (i.e. Google, Bing, etc.)
- Company website
- Friends, family members or work colleagues
- Other (please specify)

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<Consideration> When conducting initial research about companies that offer solutions and products for your business, on average how many companies do you contact before making a decision.

- 1
- 2
- 3
- 4
- 5 or more

Section 3: Solutions Considerations

<Consideration> When considering selecting a company that offers "company services/product", what factors are most important to you? (Select all that apply).

<randomize>

1. Cost: The cost is competitive and provides additional value for the cost.
2. Fulfillment: The company's solutions meet all or most of my needs.
3. Integration: The company's solutions integrate with my current processes.
4. Ease of Doing Business: The company and its technologies make it easy to do business with them.
5. Ease of Use: The company's solutions are easy for my team to use or manage.
6. Customer Experience: The company's offerings provide a great experience for my customers.
7. Existing Customers: The company's existing customers are relevant to my company's industry.
8. Customer Service: The company's customer service is responsive and delivers timely communication.
9. Custom Solutions: The company is able to customize their solutions to meet my needs.
10. Innovation: The company's solutions are innovative and provide regular updates enhancing the current offerings or new products.
11. Resources: The company provides content (blog, white papers, case studies) that enhance my education about a specific topic related to my field.

<Branching: the respondent should be served the following questions if they selected the corresponding choice above>

<note, not all of the above elements have follow-up questions>

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<Cost: if A is selected answer the following> When selecting a company that offers "company services/product", which of the following is most likely to influence your decision to select the company.

- The provider's cost is the lowest cost.
- The provider's cost is competitive (not the lowest or the highest) and meets most of my needs.
- The provider's cost is the highest but the solution encompasses all of my needs.
- Regardless of the price, the provider provides additional value for the cost in terms of expertise and customer service.
- Other (please specify).
- None of the above.

<Fulfillment: if B is selected answer the following> When selecting a company that offers "company services/product", which of the following is most likely to influence your decision to select the company.

- The provider's solution fulfills all of my needs.
- The provider's solution fulfills majority of my needs and those that are not fulfilled are not meaningful.
- The provider's solution fulfills the most important needs, though not the majority of my needs.
- Other (please specify).
- None of the above.

<Integration: if C is selected answer the following> When selecting a company that offers "company services/product", which of the following is most likely to influence your decision to select the company.

- The provider's solution fully integrates with my existing software.
- The provider's solution eliminates the need for my existing software.
- It is not important how the solution integrates with the existing software.
- Other (please specify).
- None of the above.

<Existing Customers: if G is selected answer the following> When selecting a company that offers "company services/product", how important is it that the company's existing customers are relevant to your industry?

- Very important
- Moderately important
- Neutral
- Low importance
- Not at all important

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Section 4: Recent Experience
On a scale from 0-10 where 10 = meets all needs and 0 = does not meet any need, how well does "Company Name" meet your needs?

<sliding scale>

0 - Does Not Meet Any Need 10 - Meets All Needs

How likely are you to recommend "Company Name"?

<Net Promoter>

Section 5: Competition & Market Share
Who would you consider to be "Company Name"'s top competitor?

<open ended>

Think about the company that provides the largest volume of "company product or service", what percentage of your needs do they fulfill?

10% or less

11% to 20%

21% to 30%

31% to 40%

41% to 50%

51% to 60%

61% to 70%

71% to 80%

81% to 90%

91% to 100%

Please select the top three reasons that would make you consider changing your "company service/product" provider.

<list of reasons from stakeholder and customer interviews>

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