

CUSTOMER QUESTIONNAIRE

Below are suggested questions for developing your customer story. Note - your internal team should answer as many of these questions as possible BEFORE anyone speaks with a customer to find out more. Doing this homework first makes the most of their time. The remaining questions could be handled over a call with your customer (we would recommend that) or via email if that is more convenient for them. If you do conduct an interview over the phone/zoom, make sure to record it (and of course ask for your customer's permission to do so). Not only is this helpful for your writer to capture details and potential quotes for the case study, but you could also use pieces of the recorded interview for a future customer testimonial.

1. What is your name and contact information?

2. Tell us about your organization and the community it serves (i.e. # of employees, city/county(s), square miles covered, public/private, etc.).

3. How did you first hear about us and our tools/products/services?

4. What tools of ours do you use?

5. When did you start using our tool(s)?

6. What challenge were you facing when you decided to make a change?

7. How did you work with our team to customize and implement that tool to address the concern?

8. How did/do you use our tool?

9. How many people in your organization use the tool?

10. Do you have any photographs/graphics of how your organization is using our tool?

11. What kinds of results did you see and when did you see them? (Any visual/graphics data depicting these results available?)

12. How are you tracking your results and/or measuring success (over time, using what benchmarks or analytics tools, etc.)?

13. What kind of ROI have you seen on this effort so far in saving time and/or resources?

14. What are the major takeaways from your experience using our tool?

15. If you had to give a one-sentence review of our organization and our tool, what would you say?

16. What could we do to improve our processes or tool to make your life easier?

17. What would you do differently next time?

18. What advice would you give to others facing a similar situation?