Customer Questionnaire Checklist

Expectations: What do you expect from us?

Model: What is you business model?

Success: What are you company’s success factors/key predictive indicators?

Value: How do you see us adding value?

Highest Value: What is the most value to you?

Alternative: What are your alternatives (products and competitors) to this solution?

Pains: What are your current problems?

Stresses: What keeps you up at night?

Growth: What are your growth plans?

Lottery: If price were not an issue what would you have us do?

Standards: What service standards do you have of us?

Switch: Why are you changing firms?

Turnaround: How quick do you expect responses to e-mails and delivered product?

Privacy: What privacy issues do you have and are there certain pieces of information or meetings you want us to stay away from?

Associates: May we contact your associates for information?

Costs: What is your cost of not solving this problem?

Referral: How did you hear about us?

Decision Timeline: How much time do you have to select a firm?

Who’s Money: Are you paying with your money or billing this out?

Newness: How new is your firm?

Options: Are you pricing with other firms?

Boomerang: Have you returned after pricing elsewhere (usually means pricing is too low and customer is only focused on price – not a great customer)

Restrooms: What is the state of your restrooms?