Customer Survey Template

Revised: November 2011

Survey Instructions

The template below can be used to create an online survey that will help you answer the "what", "where" and "how" of your customers' buying process. Find out what types of content they are looking for. Find out what content formats they prefer. Find out where they are going to look for it. And ultimately…How you can use this data to improve the effectiveness of your marketing efforts.

In order to increase survey completions, try to keep your survey tight with as few questions as possible. Not all of the questions included in this template have to be used. Pick the questions that seem the most relevant to you based on the information you are trying to glean.

When you've finalized your questions and set up your online survey, walk through it and time yourself. It's always good to let your survey recipients know how long the survey will take. You also might want to test the survey with a customer to ensure your questions are clear and their responses are hitting the mark.

Another way to increase survey completions is to offer some sort of incentive for completing it. Common incentives include: Starbucks gift cards, free ebook/whitepaper downloads or a coupon/discount on your products or service. You don't have to provide an incentive, but these do help boost responses. The more data you have, the more accurate your customer insights will be.

Recommended Online Survey Tools: SurveyMonkey.com, SurveyGizmo.com

Survey Introduction
Below is a possible welcome message that you can use/modify to introduce your survey.

Dear (Customer Name),
In full transparency, we are in the process of improving the quality and relevance of the content that we offer as part of our sales and marketing efforts. We would love to get your feedback with a quick survey that shouldn't take you more than 3 minutes.

Needs / Pain Identification

1. When you think about _____ (product/service category), what is the single biggest challenge related to that topic?

2. Which product/service features are most critical to your business? (checkboxes listing all features)

Research / Purchasing Process

3. When you become aware of your need for a new product or service, which resource do you use first to research potential solutions?
   - Search Engine (Google, Yahoo, Bing, Other)
   - Specific Industry Websites *(online forums, blogs, etc.- list if you know of specific sites)*
   - Trade publications (magazines, journals, etc.)
   - Tradeshows / Live Events
   - Word of Mouth
     - If word of mouth, then who: _____
   - Email / eNewsletters
   - Yellow Pages
   - Newspaper

4. What other research tools might you use? (checkboxes with same list)

5. Approximately what percentage of your shopping do you do online? (0-10%, 10%-25%, 25%-50%, 50%-75%, 75%-100%)

6. Which search engine do you use most? (Google, Yahoo, Bing, Other)

7. If you were trying to locate a solution for _____ product/service, what are the first keywords or phrases that come to mind that you would type in a search engine?
(open-ended text box)

8. When researching a solution, which content format would you prefer to use to learn about the solution?
   - Text (articles, website content, whitepapers)
   - Video
   - Audio (mp3 downloads, audio seminars)

9. When researching a solution, which type of content would be the most helpful in making a purchase decision? Rank these five content types as 1 being the least helpful and 5 being the most helpful.
   - High-level content that shares industry trends, insights and thought leadership.
   - Educational content that helps you understand the functions, features and benefits of the product/service
   - Promotional content that informs you of the latest products/services, offers or discounts.
   - Community-supported content that shows this company's commitment to a specific cause, topic or message.
   - Entertaining content that gives you a feel for the personality of the company.

10. Based on your day-to-day workload, do you HAVE time to keep up with the latest information on _____ (product/service category)?
(Yes/No)

11. Based on your day-to-day workload, do you MAKE time to keep up with the latest information on _____ (product/service category)?
(Yes/No)

12. Would you prefer to have informational content delivered to you vs. you going and finding it?
   - I'd like content sent to me.
   - I prefer to find the information myself.

13. Do you like to receive relevant emails or email newsletters from companies/brands you've purchased from or care about?
(Yes/No)

14. In which social media / social networking sites do you currently have an account?
(Facebook, Twitter, LinkedIn, YouTube, Other relevant networks/industry sites)

15. How much time (in minutes) per week do you think you spend visiting social media websites?
(0-30 minutes/week, 30-60 minutes/week, 60-120 minutes/week, more than 120 minutes/week)

16. Do you use a mobile device / smart phone to access the internet?
(yes/no)

17. Do you use a mobile device / smart phone to check your email?
(yes/no)

18. Do you use a mobile device / smart phone to participate in social media?
(yes/no)

Company Demographics

- Indicate your company's size (# of employees (ranges))
- Number of Locations
- Industry (drop-down list of the industries you serve)

Buyer Demographics

- Gender
- Age
- Title/Position

Which of the following most accurately describes your role in the buying process?
- Decision Maker
- Researcher
- End User
- Purchasing Agent
- Board Member / Group Representative

Optional Contact Info

Name:

Email Address:

Phone:

Address: *(If sending an incentive item)*