










## Checklist for customer surveys

### 1. What are the survey objectives?

-  Increasing customer satisfaction and loyalty
-  Identifying market potentials
-  Planning advertising measures and monitoring advertising success
-  Analyzing the customer value
-  Positioning the company against its competitors
-  Determining the company value (due diligence)

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### 2. What are the information objectives and what do I need the information for?

-  Customer satisfaction
  - General (overall) customer satisfaction
  - Satisfaction with selected areas of business performance (e.g. customer service, product performance, performance of salesmen, agents, dealers)
  - Causes for satisfaction and dissatisfaction
  - List of priorities for measures of improvement (that increase customer satisfaction in the most efficient way)
  - Checking/monitoring measures for improvement
  - Degree of customer loyalty
-  Market potential
  - Knowledge of existing customers about your product/service portfolio
  - Knowledge of potential customers about your product/service portfolio
  - Opportunities of your product/service portfolio with customers
-  Advertising planning and monitoring advertising success
  - Media usage of the target group to determine the right advertising media
  - Monitoring success based on the sales trend
  - Improving awareness
  - Image changes
-  Customer analysis
  - Determining customer groups (customer segmentation)
  - Analyzing customer loyalty
  - Establishing the actual value / potential of a customer (to justify expenditure like customer visits / sales calls, special efforts etc.)

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## Competitive analysis

- Analysis of strengths and weaknesses
- Benchmarking aspects
- Image-related factors
- Ranking of major competitors

## Who do I need the information for?

### Internal recipients

- Company management
- Marketing-/sales-/service management
- Quality management
- R&D or production

### External recipients

- Customers
- Certification authorities
- Financial institutions or other companies
- Media

## When do I need the information?

- Just once and fast for short-term decisions
- Continuously for supporting and controlling my decisions

### **3. Which information and data is to be used?**

- Already existing material (data quality – date of the survey/data generation, trends, representative?)
- Still to be collected
- Or both

### **4. Which target groups are to be surveyed?**

- All active customers
- Random sample of x % of all customers
- Selected customers (e.g. only A and B clients)
- Lost customers
- (Potential) desired customers
- Dealers
- Managers/directors
- Purchasing agents
- Service and/or product users (end users)

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## 5. Where is the information to be collected?

- Nationally
- Internationally (e.g. Europe, worldwide, limited to certain regions)

## 6. Which languages are to be used for the survey?

- English
- German
- National language of each country
- One language per region (e.g. Chinese in Asia, Spanish in South America, English in Northern Europe, Russian in Eastern Europe)

## 7. Who is going to conduct the market and/or customer survey?

### ◆ My own staff, if

- free capacities and resources exist
- (necessary) know how exists
- experience and software, if necessary, exist
- conflicts of interest, “coloring” of results (i.e. interpretation/misinterpretation) are tolerable
- evaluation, analysis and interpretation of the results is ensured

### ◆ An external provider, if

- he has professional (industry/market) know-how
- impartiality and neutrality are indispensable
- professional statistical/analytical methods are preferable
- neutral presentation and discussion of results is required
- good price-performance ratio is important
- fast and efficient execution is desirable

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## 8. How do I want the data to be presented?

### ◆ Results depending on the recipient of the information

- Tables, diagrams, charts, text
- Management summary
- PowerPoint presentation by the researcher/analyst
- Re-use, e.g. in CRM
- Analysis combined with data from other sources
- Feedback report for customers
- Special reports for banks, media etc.

**If you need more detailed advice, just click on Contact and send us a message!  
Or send this questionnaire by fax with your marks, wishes and ideas. You will  
receive our quotation within a few days. FAX No.: +49 (0)2137-9178817**

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