**CLIENT SUCCESS STORY QUESTIONNAIRE**

# Company Information

| Client Name |  |
| --- | --- |
| Client Website |  |
| Client Spokesperson Name |  |
| Client Spokesperson Job Title |  |

# Story Information

## **Background**

| Short description of the client’s business. \* *(Size, location, headquarters, global presence, revenue, market share, etc.)* |  |
| --- | --- |
| Client’s brand mission/ vision. \* |  |
| Industry \* |  |
| What ERP/business solutions were you using previously? |  |

## **Challenges**

| Describe the client’s business challenges. \* |  |
| --- | --- |
| Why did the client choose to work with {Product Name}/ {Company Name}? \* |  |

## **Outcomes**

| How has the implemented solution benefitted the client?\* |  |
| --- | --- |
| Quantifiable business metrics post-deployment. \*  *Examples:*  15% reduction in the billing time on client projects  30% more visibility towards profitability projections 10% reduction in the sales cycle |  |
| Why did the client choose the solution? \*  *(Any key differentiators from competition.)* |  |
| Based on the current implementation, are there any enhancements/ next phases planned? If yes, please provide details. \*  *Example:*  *In the future, X company plans to implement {add-on or another product} to gain a better view of their order to cash cycle.* |  |
| How is {Company Name} helping the client digitally ‘transform’ their business or their industry? \* |  |
| What was the client’s experience of teaming with {Product Name}/{Company Name}? |  |
| {Company Name} is centered around {core values}’. Were any of these three values evident in this project? If so, please provide an example? |  |

# **Software Specific Questions**

| Can you tell me about your experience using {Product Name}? What was your overall impression of it? |  |
| --- | --- |
| How has {Product Name} impacted your day-to-day operations? |  |
| Have you used any similar software products in the past? If so, how does our software compare to those products? |  |
| How do you see our software product fitting into your long-term business strategy? |  |

**Notes:** You and your team will have the opportunity to review and edit the case study before external distribution.