**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 projects30% 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.