

## Customer Interview Questionnaire

Company Name \_\_\_\_\_

Date: \_\_\_\_\_

1. What is the name of your phone system?

\_\_\_\_\_

2. What communications problem would you like to solve?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

3. What goals would you like to achieve?

\_\_\_\_\_ Increase revenues

\_\_\_\_\_ Manage growth

\_\_\_\_\_ Increase service

\_\_\_\_\_ Reduce costs

4. How many calls are received each day related to this goal

\_\_\_\_\_

5. What are the peak hours for these incoming calls?

\_\_\_\_\_

6. How many call are received during a peak hour?

\_\_\_\_\_

7. What is the average duration of these incoming calls?

\_\_\_\_\_

8. By percentage, how are these incoming calls classified?

Prospective customers \_\_\_\_\_ %

Repeat customers \_\_\_\_\_ %

Vendors \_\_\_\_\_ %

Internal employees \_\_\_\_\_ %

External employees \_\_\_\_\_ %

Other \_\_\_\_\_ %

Total 100%

9. How many people are available to answer these incoming calls?

\_\_\_\_\_

10. Is it difficult to staff this department? Yes \_\_\_\_\_ No \_\_\_\_\_

11. Is staffing turnover a problem for this department? Yes \_\_\_\_\_ No \_\_\_\_\_

12. What are your normal business hours?

\_\_\_\_\_

13. How much business is conducted after normal business hours?

\_\_\_\_\_

14. After business hours how are calls routed?

\_\_\_\_\_ Night bell

\_\_\_\_\_ Voice mail

\_\_\_\_\_ Answering service, if yes, what does it cost?

\$ \_\_\_\_\_

\_\_\_\_\_ Ignore

\_\_\_\_\_ Other

\_\_\_\_\_

15. If the goal involves distributing information (e.g. reading from a database) to callers complete the following:

a) Describe the type of information, which is being requested by callers \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

b) What type of information that is distributed?

\_\_\_\_\_ Numeric values

\_\_\_\_\_ Alphabetic names or descriptions

\_\_\_\_\_ Long text messages

\_\_\_\_\_ Status codes

\_\_\_\_\_ Other

\_\_\_\_\_

c) How is this currently being handled?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

d) Does the information being inquired change frequently?

- \_\_\_\_\_ Every minute
- \_\_\_\_\_ Hourly
- \_\_\_\_\_ Daily
- \_\_\_\_\_ Weekly
- \_\_\_\_\_ Other \_\_\_\_\_

16. If the goal involves collecting information from caller, complete the following:

a) Describe the type of information, which is being asked for:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

b) How is this currently being done?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

c) What type of information do you receive from callers?

- \_\_\_\_\_ Numeric
- \_\_\_\_\_ Alphanumeric
- \_\_\_\_\_ Alpha
- \_\_\_\_\_ Voice messages

d) How many digits or characters do you receive from callers? For example, do you ask for a 5-digit customer number, a 9-digit zip code or a 30-character company name?

\_\_\_\_\_

17. What happens after the caller either inputs or receives the information?

- \_\_\_\_\_ Hang up
- \_\_\_\_\_ Transfer call
- \_\_\_\_\_ Repeat application
- \_\_\_\_\_ Other

\_\_\_\_\_

Note: If possible obtain a flowchart of the application or inquire if one is being developed.

Financial Information

Is money budget for his project?

\_\_\_\_\_ Yes

\_\_\_\_\_ No

Which department has the budget?

\_\_\_\_\_

What price range is expected? \$\_\_\_\_\_ to \$\_\_\_\_\_

What is the time frame for implementation?

\_\_\_\_\_

Have you talked to other vendors?

\_\_\_\_\_ Yes, who?

\_\_\_\_\_ No

Do you plan to use an RFP process?

\_\_\_\_\_ Yes

\_\_\_\_\_ No

Who makes the final decision and how does it get made?

\_\_\_\_\_

\_\_\_\_\_