

Customer Reference Practices Baseline Survey

- ▶ Use this survey template to create a web survey to better understand how customer references are found and used in your sales environment today. The results will give you a clear picture of the process, volume, efficiency, and effectiveness of your current reference practices.

SURVEY TIPS:

Modify question #4 to reflect the known methods and practices used in your company. Add other essential questions but be careful not to make the survey too long, which will increase abandonment rates. It's critical that all recipients can answer each question and that you have a minimum of 25 responses in order to have a "statistically relevant" data set.

Note that this survey should be supplemented with post-survey follow up conversations with stakeholders to explore specific comments.

Finally, this isn't a one and done activity. This survey establishes a baseline, which should be compared to results from a follow-up survey in 6-9 months. The findings will be valuable in assessing the impact of the implemented improvements (i.e., policies, processes, technology).

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Transforming Customer Reference Management

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Customer Reference Practices Baseline Survey

Does your role include sourcing and providing customer references as part of your job responsibilities? • Yes - Continue to survey • No - Exit survey

- 1.** What percentage of your deals require references to close?
- None
 - 1-25%
 - 25-50%
 - 50-75%
 - 75-99%
 - All

- 2.** On average, how many reference requests from prospects do you handle PER MONTH?
- Less than 1
 - 1 • 2 • 3 • 4
 - Other (please specify)

- 3.** On average, how many hours do you spend managing EACH request?
- Less than 1
 - 1-2 • 3-4 • 5-6 • 7-8
 - Other (please specify)

- 4.** What methods do you use to line up references? (Select all that apply)
- A request to marketing (sales operations)
 - A mass email request to the sales team
 - Targeted email or phone calls to colleagues
 - Other (please specify)

- 5.** On average how much CALENDAR TIME does it take from request to reference call?
- Less than 3 days
 - 3-5 days
 - 6-10 days
 - More than 10 days
 - Other (please specify)

- 6.** What percentage of arranged reference calls DON'T happen?
- None
 - 1-25%
 - 25-50%
 - 50-75%
 - 75-99%
 - All

- 7.** What percentage of completed reference calls have NEGATIVELY impacted deals?
- None
 - 1-25%
 - 25-50%
 - 50-75%
 - 75-99%
 - All

- 8.** Has the overuse of a reference ever caused a temporary or permanent hold on their use?
- Yes
 - No

Comments: