

Sample Stakeholder Questionnaire

1. How did you first hear of / come in contact with COMPANY?
 - a. When was this?
2. How often do you interact directly with COMPANY?
3. How do you hear from or about COMPANY?
 - a. For example: email, mail, phone calls, reading media, newsletter, etc.
 - b. Do you hear from or about COMPANY frequently enough?
4. What three words best describe COMPANY?
5. How is COMPANY different than other [asset firms / consultants / wealth managers/ tech providers, FILL IN THE BLANK]
6. What makes COMPANY better than the competition?
7. In what areas could COMPANY improve?
8. Would you refer COMPANY to someone?
9. What media do you consume regularly that you find are informative on your industry / for your particular role?