

CLIENT ORDER AND CONTRACT PACKAGE



InfoQuest Customer Relationship Management Limited
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INFOQUEST PROJECT SET-UP

This package contains everything you need to launch InfoQuest. Simply follow these easy steps.

STEP 1 – Select the content of your survey

From the [Library of Categories and Questions](#) choose up to fourteen question sets. Each set will consist of four cards for your deck. Category Number 1, the Standard Questions, will automatically be added to your selection.

STEP 2 – Fill in the service agreement of your choice

There are four Service Agreements in this booklet for surveys ranging from 60 to 250 boxes. Each one can be expanded as required and will be explained to you before you go ahead.

STEP 3 – Prepare your customer contact / mailing list

We will need a list of the [customers you've selected](#) to participate in the programme. For each customer, please provide the company name and address, the contact person's name and title and the contact person's phone number. If you wish to have the Problem Identification Matrix organised by account revenue, you will need to add revenue information to each customer listing. For international surveys, please tell us the language we should use for each contact.

Note that when preparing your customer list, and when mailing the letter to each customer, you should add a 20% buffer to your target number of surveys. For example, if your target is 60 boxes, provide 72 names and letters; for 150 boxes, provide 180 names, and so on. This will allow for those customers that decline participation or we cannot reach.

STEP 4 – Making your report even more actionable

Additional customised reports can be created for Product Type, Region or Account Type, to reflect any internal responsibilities and accountabilities. The details should be added to the database as extensions against each customer. One-way segmentation is at no cost. Multiple segmentation can be done and if you would like the raw data, please ask before the exercise begins.

We would appreciate having this list E-mailed to us on an Excel spreadsheet. A requested format is found on page 9.

STEP 5 – Branding the survey

We will need a high-resolution company logo for your supplemental information sheet in a jpeg or Gif file format. If you have a corporate logo and a brand logo then we can use both. Just let us know.

STEP 6 – Getting your senior team involved

InfoQuest usually run post-survey workshops with the senior management team and one workshop is included in the price for all but the smallest project. If you give InfoQuest a list of the senior managers who will be attending the workshop, we will give them the opportunity to predict how your customers will respond.

STEP 7 – Asking your customers to be involved

We ask you to send out advance customer notification letters two business days before the programme begins. A format for this letter appears below. We strongly recommend that the most senior person in your organisation sign this letter in order to give the process the weight it deserves. In the example letter it mentions “sharing the results” of the survey with the customers. The most common ways of doing this include sending out a Thank You letter after the survey or publishing a Newsletter. InfoQuest can provide samples or examples of these if you wish.

RECOMMENDED FORMAT CUSTOMER CONTACT LETTER

**** Sent out in advance, on your letterhead, to everyone on your survey list ****

May 7, 2016
Mr Chris Horner
ABC Company
100 Main Street
London HD8 9NH

Dear Mr Horner

In our continuing efforts to identify those areas in which we may better serve our business partners, and to give us the tools to adequately plan for the future, [company name] needs your help.

In the next few days we will be conducting a survey of some of our key customers. InfoQuest will manage this exercise on our behalf and they have been asked to contact you as a desired participant. The purpose of the exercise is to gather data that will enable us to identify areas in which we may be able to improve our service to you. As one of our valued customers, we would appreciate it very much if you would take the few minutes needed to complete the survey.

Once the survey is finished we would like to share the results with you, along with our plans for dealing with any issues or problems the survey identifies. In that regard your completely candid thoughts, insights and responses to the survey will help make that effort productive for all of us. From the time we start, the survey will take about three months to complete.

InfoQuest will be contacting you in the near future seeking your agreement to participate in this program. It is my sincere hope that your response will be positive.

Thank you in advance for your input and recommendations. If you have any questions, please feel free to give me a call.

Yours sincerely,

STEP 8 – Timing!

The start of the project needs to be carefully coordinated – the timing of your letters going out; the assembly of the deck of cards; and, where applicable, all the translations to be checked. And please let us know if we should quote a purchase order number on our first-half invoice, which needs to be issued and paid before the survey starts.

SERVICE AGREEMENT INFOQUEST ELP 60 BOXES

AGREEMENT, entered into this _____ day of _____, 20____ by and between InfoQuest Customer Relationship Management Limited (hereinafter "InfoQuest CRM") and _____, (hereinafter the "Client").

1. InfoQuest CRM is hereby engaged to perform an InfoQuest Business Process Review of _____ of the Client's customers. The Client recognizes and agrees that it is absolutely vital for the success of the survey that InfoQuest be provided complete, accurate and up-to-date contact information, and that its failure or inability to do so will be to the detriment of the project. If InfoQuest is unable to deliver the required number of surveys because of dated, inaccurate or insufficient information, Client will be given the opportunity to either update problem information, or provide additional contact names.

2. Upon completion of the survey, InfoQuest CRM will prepare reports that will contain the following elements:

- A. An executive summary of the overall findings.
- B. A summary of findings for each category of questions.
- C. A Problem Identification Matrix showing, by respondent, all dissatisfied responses to key satisfaction questions.
- D. Individual reports which will show, by respondent, replies to each question and statement posed in the survey.
- E. A Revenue Index, which calculates the relationship between customer satisfaction and revenue maximization.
- F. Written customer comments, on a form we will provide to each customer surveyed.
- G. (Where appropriate) summary of responses to any Management Surveys conducted.
- H. Reports will be delivered approximately 8 to 12 weeks after Client's completion of Item 3 below.

3. Client is responsible for the following:

- A. Delivery of a contact list, by e-mail on Excel if possible, containing for each customer to be surveyed the company name, the contact person's name and title, and the contact person's mailing address and phone number.
- B. Delivery of an advance notification letter to each customer. A recommended format has been presented to Client with this Agreement.
- C. For both Items A and B above, quantities provided should be the number of surveys being contracted for plus an additional 20%.
- D. Printing out additional copies of the report(s) for the post-survey workshops.

4. InfoQuest CRM represents and warrants that all information it receives and processes on Client's behalf is highly sensitive and confidential, and will at all times be held and treated as trade secrets. InfoQuest CRM will not at any time disclose or allow to be disclosed to any unrelated third parties, under any circumstance or by any means, any information, data, results, charts, graphs or other material, of any kind whatsoever, that could in any way be used to identify your company, or the names, identities or responses of any of the customers we survey on your behalf. InfoQuest CRM fully accepts this provision as a binding legal obligation on behalf of itself, its affiliated corporations, and their respective employees, officers, directors, agents, personal representatives, successors and assigns, and each of them, without reservation and without limitation of time.

5. The cost of this engagement is as follows:

- Base Program (60 outbound surveys entailing 9 categories - 1 standard and any 8 you choose).....	£ 6,300.00
- Additional Customers (61-100 @ £68.90 each).....	£ _____
(101-250 @ £63.60 each).....	£ _____
(251+ @ £58.30 each).....	£ _____
- Additional Categories (£225 each).....	£ _____
- Additional Management Surveys (£35 each).....	£ _____
- Additional Post-survey workshops (£736 per day plus expenses).....	£ _____
- Local Language Work - Europe (£315 per language).....# _____ languages.....	£ _____
- Local Language Work - Asia and ROW (£435 per language).....# _____ languages.....	£ _____
- Courier Delivery (parts of Africa / Asia / Latin America / Russia) Via FedEx	£ <u>T.B.A.</u>
- Extra Reports for Segments, Regional Offices etc.)pdf (£300 ea.) # _____ reports.....	£ _____
- Extra Reports in Local Language - pdf (£500 ea.)# _____ reports.....	£ _____
TOTAL COST	£ _____

(all prices plus VAT @ 20%)

6. Payment Terms are one half prior to commencing survey, and the balance upon delivery of the results.

The undersigned, having the legal right and authority to act on behalf of their respective companies, hereby mutually accept and agree to abide by the terms and conditions of this agreement, dated as of the date first shown above.

By: _____
Client

By: _____
InfoQuest CRM Limited

Date

SERVICE AGREEMENT INFOQUEST PROFIT BUILDER 100 BOXES

AGREEMENT, entered into this ____ day of _____, 20____ by and between InfoQuest Customer Relationship Management Limited (hereinafter "InfoQuest") and _____, (hereinafter the "Client").

1. InfoQuest is hereby engaged to perform an InfoQuest Business Process Review of _____ of the Client's customers. The Client recognizes and agrees that it is absolutely vital for the success of the survey that InfoQuest be provided complete, accurate and up-to-date contact information, and that its failure or inability to do so will be to the detriment of the project. If InfoQuest is unable to deliver the required number of surveys because of dated, inaccurate or insufficient information, Client will be given the opportunity to either update problem information, or provide additional contact names.

2. Upon completion of the survey, InfoQuest will prepare reports that will contain the following elements:

- A. An executive summary of the overall findings.
- B. A summary of findings for each category of questions.
- C. A Problem Identification Matrix showing, by respondent, all dissatisfied responses to key satisfaction questions.
- D. Individual reports which will show, by respondent, replies to each question and statement posed in the survey.
- E. A Revenue Index, which calculates the relationship between customer satisfaction and revenue maximization.
- F. Written customer comments, on a form we will provide to each customer surveyed.
- G. (Where appropriate) summary of responses to any Management Surveys conducted.
- H. Reports will be delivered approximately 8 to 12 weeks after Client's completion of Item 3 below.

3. Client is responsible for the following:

- A. Delivery of a contact list, by e-mail on Excel if possible, containing for each customer to be surveyed the company name, the contact person's name and title, and the contact person's mailing address and phone number.
- B. Delivery of an advance notification letter to each customer. A recommended format has been presented to Client with this Agreement.
- C. For both Items A and B above, quantities provided should be the number of surveys being contracted for plus an additional 20%.
- D. Printing out additional copies of the report(s) for the post-survey workshops.

4. InfoQuest represents and warrants that all information it receives and processes on Client's behalf is highly sensitive and confidential, and will at all times be held and treated as trade secrets. InfoQuest will not at any time disclose or allow to be disclosed to any unrelated third parties, under any circumstance or by any means, any information, data, results, charts, graphs or other material, of any kind whatsoever, that could in any way be used to identify your company, or the names, identities or responses of any of the customers we survey on your behalf. InfoQuest fully accepts this provision as a binding legal obligation on behalf of itself, its affiliated corporations, and their respective employees, officers, directors, agents, personal representatives, successors and assigns, and each of them, without reservation and without limitation of time.

5. The cost of this engagement is as follows:

- Base Program (100 outbound surveys entailing 10 categories - 1 standard and any 9 you choose).....	£ 9,300.00
- Up to 10 Management Surveys and one management workshop on your site (included)	
- Additional Customers (101-250 @ £63.60 each).....	£ _____
(251+ @ £58.30 each).....	£ _____
- Additional Categories (£225 each).....	£ _____
- Additional Management Surveys (£35 each).....	£ _____
- Additional post-survey workshops (£736 per day plus expenses).....	£ _____
- Local Language Work - Europe (£315 per language)..... # _____ languages.....	£ _____
- Local Language Work - Asia and ROW (£435 per language)..... # _____ languages.....	£ _____
- Courier Delivery (parts of Africa / Asia / Latin America / Russia) Via FedEx	£ T.B.A.
- Extra Reports for Segments, Regional Offices etc.)pdf (£300 ea.) . # _____ reports.....	£ _____
- Extra Reports in Local Language - pdf (£500 ea.)# _____ reports.....	£ _____

TOTAL COST £ _____

(all prices plus VAT @ 20%)

6. Payment Terms are one half prior to commencing survey, and the balance upon delivery of the results.

The undersigned, having the legal right and authority to act on behalf of their respective companies, hereby mutually accept and agree to abide by the terms and conditions of this agreement, dated as of the date first shown above.

By: _____
Client

By: _____
InfoQuest CRM Limited

Date

SERVICE AGREEMENT INFOQUESTCORPORATE 150 BOXES

AGREEMENT, entered into this _____ day of _____, 20____ by and between InfoQuest Customer Relationship Management Limited (hereinafter "InfoQuest") and _____, (hereinafter the "Client").

1. InfoQuest is hereby engaged to perform an InfoQuest Business Process Review of _____ of the Client's customers. The Client recognizes and agrees that it is absolutely vital for the success of the survey that InfoQuest be provided complete, accurate and up-to-date contact information, and that its failure or inability to do so will be to the detriment of the project. If InfoQuest is unable to deliver the required number of surveys because of dated, inaccurate or insufficient information, Client will be given the opportunity to either update problem information, or provide additional contact names.

2. Upon completion of the survey, InfoQuest will prepare reports that will contain the following elements:

- A. An executive summary of the overall findings.
- B. A summary of findings for each category of questions.
- C. A Problem Identification Matrix showing, by respondent, all dissatisfied responses to key satisfaction questions.
- D. Individual reports which will show, by respondent, replies to each question and statement posed in the survey.
- E. A Revenue Index, which calculates the relationship between customer satisfaction and revenue maximization.
- F. Written customer comments, on a form we will provide to each customer surveyed.
- G. (Where appropriate) summary of responses to any Management Surveys conducted.
- H. Reports will be delivered approximately 8 to 12 weeks after Client's completion of Item 3 below.

3. Client is responsible for the following:

- A. Delivery of a contact list, by e-mail on Excel if possible, containing for each customer to be surveyed the company name, the contact person's name and title, and the contact person's mailing address and phone number.
- B. Delivery of an advance notification letter to each customer. A recommended format has been presented to Client with this Agreement.
- C. For both Items A and B above, quantities provided should be the number of surveys being contracted for plus an additional 20%.
- D. Printing out additional copies of the report(s) for the post-survey workshops.

4. InfoQuest represents and warrants that all information it receives and processes on Client's behalf is highly sensitive and confidential, and will at all times be held and treated as trade secrets. InfoQuest will not at any time disclose or allow to be disclosed to any unrelated third parties, under any circumstance or by any means, any information, data, results, charts, graphs or other material, of any kind whatsoever, that could in any way be used to identify your company, or the names, identities or responses of any of the customers we survey on your behalf. InfoQuest fully accepts this provision as a binding legal obligation on behalf of itself, its affiliated corporations, and their respective employees, officers, directors, agents, personal representatives, successors and assigns, and each of them, without reservation and without limitation of time.

5. The cost of this engagement is as follows:

- Base Program (150 outbound surveys entailing 11 categories - 1 standard and any 10 you choose).....	£14,100.00
- Up to 10 Management Surveys and one management workshop on your site (included)	
- Additional Customers (151-250 @ £63.60 each).....	£ _____
(251+ @ £58.30 each).....	£ _____
- Additional Categories (£225 each).....	£ _____
- Additional Management Surveys (£35 each).....	£ _____
- Additional post-survey workshops (£736 per day plus expenses).....	£ _____
- Local Language Work - Europe (£315 per language)..... # _____ languages.....	£ _____
- Local Language Work - Asia and ROW (£435 per language)..... # _____ languages.....	£ _____
- Courier Delivery (parts of Africa / Asia / Latin America / Russia) Via FedEx	£ T.B.A.
- Extra Reports for Segments, Regional Offices etc.)pdf (£300 ea.) . # _____ reports.....	£ _____
- Extra Reports in Local Language - pdf (£500 ea.)# _____ reports.....	£ _____
TOTAL COST	£ _____

(all prices plus VAT @ 20%)

6. Payment Terms are one half prior to commencing survey, and the balance upon delivery of the results.

The undersigned, having the legal right and authority to act on behalf of their respective companies, hereby mutually accept and agree to abide by the terms and conditions of this agreement, dated as of the date first shown above.

By: _____
Client

By: _____
InfoQuest CRM Limited

Date

SERVICE AGREEMENT INFOQUEST GLOBAL 250 BOXES

AGREEMENT, entered into this ____ day of _____, 20____ by and between InfoQuest Customer Relationship Management Limited (hereinafter "InfoQuest") and _____, (hereinafter the "Client").

1. InfoQuest is hereby engaged to perform an InfoQuest Business Process Review of _____ of the Client's customers. The Client recognizes and agrees that it is absolutely vital for the success of the survey that InfoQuest be provided complete, accurate and up-to-date contact information, and that its failure or inability to do so will be to the detriment of the project. If InfoQuest is unable to deliver the required number of surveys because of dated, inaccurate or insufficient information, Client will be given the opportunity to either update problem information, or provide additional contact names.

2. Upon completion of the survey, InfoQuest will prepare reports that will contain the following elements:

- A. An executive summary of the overall findings.
- B. A summary of findings for each category of questions.
- C. A Problem Identification Matrix showing, by respondent, all dissatisfied responses to key satisfaction questions.
- D. Individual reports which will show, by respondent, replies to each question and statement posed in the survey.
- E. A Revenue Index, which calculates the relationship between customer satisfaction and revenue maximization.
- F. Written customer comments, on a form we will provide to each customer surveyed.
- G. (Where appropriate) summary of responses to any Management Surveys conducted.
- H. Reports will be delivered approximately 8 to 12 weeks after Client's completion of Item 3 below.

3. Client is responsible for the following:

- A. Delivery of a contact list, by e-mail on Excel if possible, containing for each customer to be surveyed the company name, the contact person's name and title, and the contact person's mailing address and phone number.
- B. Delivery of an advance notification letter to each customer. A recommended format has been presented to Client with this Agreement.
- C. For both Items A and B above, quantities provided should be the number of surveys being contracted for plus an additional 20%.
- D. Printing out additional copies of the report(s) for the post-survey workshops.

4. InfoQuest represents and warrants that all information it receives and processes on Client's behalf is highly sensitive and confidential, and will at all times be held and treated as trade secrets. InfoQuest will not at any time disclose or allow to be disclosed to any unrelated third parties, under any circumstance or by any means, any information, data, results, charts, graphs or other material, of any kind whatsoever, that could in any way be used to identify your company, or the names, identities or responses of any of the customers we survey on your behalf. InfoQuest fully accepts this provision as a binding legal obligation on behalf of itself, its affiliated corporations, and their respective employees, officers, directors, agents, personal representatives, successors and assigns, and each of them, without reservation and without limitation of time.

5. The cost of this engagement is as follows:

- Base Program (250 outbound surveys entailing 13 categories - 1 standard and any 12 you choose).....	£21,900.00
- Up to 15 Management Surveys and one management workshop on your site (included)	
- Additional Customers (£58.30 each).....	£ _____
- Additional Categories (£225 each).....	£ _____
- Additional Management Surveys (£35 each).....	£ _____
- Additional post-survey workshops (£736 per day plus expenses).....	£ _____
- Local Language Work - Europe (£315 per language)..... # _____ languages.....	£ _____
- Local Language Work - Asia and ROW (£435 per language)..... # _____ languages.....	£ _____
- Courier Delivery (parts of Africa / Asia / Latin America / Russia) Via FedEx	£ T.B.A.
- Extra Reports for Segments, Regional offices etc. pdf (£300 ea.)# _____ reports.....	£ _____
- Extra Reports in Local Language - pdf (£500 ea.)# _____ reports.....	£ _____
TOTAL COST	£ _____

(all prices plus VAT @ 20%)

6. Payment Terms are one half prior to commencing survey, and the balance upon delivery of the results.

The undersigned, having the legal right and authority to act on behalf of their respective companies, hereby mutually accept and agree to abide by the terms and conditions of this agreement, dated as of the date first shown above.

By: _____
Client

By: _____
InfoQuest CRM Limited

Date

**REQUESTED FORMAT
CUSTOMER LIST**

TITLE	FIRST NAME	LAST NAME	JOB TITLE	COMPANY	ADDRESS 1	ADDRESS 2	ADDRESS 3	POST CODE	PHONE NO.	SALES VALUE OF ACCOUNT	CUSTOMER PENETRATI ON	REGION	PRODUCT	LANG- UAGE
Mr	John	Smith	Logistics Manager	Acme Widget Co	2 Main Street	Clayton	Leeds	HD8 9NH	01484 868 390	£85,000	80%	North	Valves	English
Herr	Jan	Fischer	Einkäufer	Arcelor	Sandweg 10	Duisburg	Germany	41169	0049 2169 60313	£60,000	50%	Germany	Pumps	German

N.B. Please also provide e-mail addresses where possible – these can be useful as a back-up.

Prepared in Microsoft Excel or similar