

Customer Survey & Request Email Templates

Use these survey and email templates to run high-impact customer surveys and set yourself up for strong response rates.

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CUSTOMER SURVEY

These questions are designed to surface patterns in how your ideal customers typically 1) realize an existing solution or habit no longer works for them, 2) seek and evaluate new solutions, 3) make the decision to adopt your product as their new solution, and 4) build new habits around using your product.

Customer survey welcome screen

Hi there, we really appreciate you sharing your experience with [Product]! 🙏

We know you're super busy, so we promise to only ask a few key questions.

This should take *less than 5 minutes* to complete.

Customer survey questions

Important: *When building your survey, be sure to include a hidden field that automatically records identifying information, such as the respondent's name, email address, or user ID number.*

This is important because once you begin analyzing your results, you may need extra contextual information that customers don't directly state in their replies — like the type of company they work for, their industry, job title, etc. If you have the respondent's name or email, you can check these details in your CRM, look them up on LinkedIn or other relevant social profiles, etc.

[0. Hidden field capturing respondent's name / email / identifying detail]

1. Prior to [Product], what were you doing to [accomplish what they now accomplish with your product]?

If you were using any other tools or solutions, what were those?

2. When did you realize you needed a solution like [Product]?

In other words, what was going on in your world that caused you to start looking for something new, to replace what you were previously doing / using?

3. How did you find out about [Product]?

4. Why did you decide to choose us over other options? Can you recall if anything in particular appealed or stood out to you?
5. What dealbreakers would have prevented you from choosing [Product]?
6. When you signed up for [Product], what happened that made you feel certain it was right for you?
7. Now that you have [Product] in your life, what's the #1 thing you're able to do that you weren't before?
8. Thanks so much for sharing your input! Would you be open to discussing your experience with [Product] further on a short 1:1 call?

This is optional. If yes, please share the email address you'd like us to use to reach you. We'll use this information only to schedule a call with you (your address will not be added to any lists). If no, simply leave this question blank.

CUSTOMER SURVEY REQUEST EMAILS

When inviting your customers to complete a survey, be sure to send the email in plain text format. Do not use fancy design or a “newsletter”-style layout.

*This email should come from a **REAL team member’s name** and email address. **Avoid** using a generic name and address — for example, “The Success Team” and support@[product].com.*

Initial email

To: Your Customer
From: [Name] at [Company]
Subject: Could you help us out? 🙏

Hi [Name],

[Name] here, [Job Title] of [Company]. 🙌 Hope you're doing well!

My team and I are trying to make your experience with [Company] **even better** —and to do that, we have a few questions we’re hoping we could ask so we can get an understanding of what matters most to you.

Would you mind answering a few (short) questions? It shouldn't take more than 5 minutes of your time.

If so, we'd love to get your input here [\[link to survey\]](#).

Cheers, and thanks so much in advance — we’re excited to hear from you!

[Name]
[Job Title]
[Company]

Follow-up email 1

To: Your Customer
From: [Name] at [Company]
Subject: Re: [Initial subject line]

Hi [Name],

I reached out earlier this week hoping to ask you a few questions that would help make your experience with [Product] even better — would you be open to sharing your thoughts? It shouldn't take more than 5 minutes of your time, and we'd be so grateful. If so, we'd love to get your input here **[link to survey]**.

Cheers, and thanks so much!

[Name]
[Job Title]
[Company]

Follow-up email 2

To: Your Customer
From: [Name] at [Company]
Subject: Last check-in re: [Initial subject line]

Hi [Name],

I know you're super-busy, so just checking one last time to see whether you could answer a few questions about your experience with [Product]. It would really help us improve!

Again, it should take 5 min or less, and we'd really appreciate it. We'd love to hear from you here **[link to survey]**.

Thanks again,

[Name]
[Job Title]
[Company]