

ESSENTIAL QUESTIONS FOR MSPS TO UNCOVER CUSTOMER NEEDS



▾ Basic Information

What is your company's primary business focus?

- Tip: Understanding their core business helps tailor your pitch to how your services can enhance their operations.

What is your role within the company?

- Tip: Knowing their role helps in understanding their decision-making power and specific needs.

▾ Timeline and Implementation Questions

What is your timeline for implementing a new VoIP/UCaaS system?

- Tip: Understanding their timeline helps manage expectations and project planning.

How urgent is the need to resolve your current communication issues?

- Tip: Urgency can indicate how quickly they might make a decision.

Are there any upcoming projects or events that make this timeline critical?

- Tip: Key events can drive the urgency for your solution.

▾ Budget and Authority Questions

Who is the primary decision-maker for purchasing new technology solutions in your company?

- Tip: Identifying decision-makers ensures you address the right people.

▾ Business Impact Questions

What impact do you expect from upgrading your communication systems?

- Tip: Clarifying expected outcomes helps tailor your pitch to their expectations.

How do you measure the success of your current communication tools?

- Tip: Metrics can guide how you present the benefits of your solution.

What qualitative improvements (like efficiency or employee satisfaction) are you hoping to achieve?

- Tip: Soft benefits can be just as compelling as hard metrics.

▾ Competitor and Industry Questions

Who are your biggest competitors and what communication tools do they use?

- Tip: Understanding their competition can help highlight how your solution offers a competitive edge.

What trends in the MSP industry are you currently following?

- Tip: Aligning with industry trends shows you are on the cutting edge.

▾ Revisiting and Upselling Questions

What has changed in your business since we last spoke?

- Tip: Stay updated on their evolving needs and conditions..

Have you seen improvement in your communication efficiency with our trial services?

- Tip: Positive feedback from trials can lead to a sale.

How can we continue to support your business growth through our services?

- Tip: Position yourself as a long-term partner in their success.

What additional features or support would make you more comfortable with our solution?

- Tip: Customizing your offer to meet their needs can seal the deal.

Would you consider additional services like network monitoring or cybersecurity along with VoIP/UCaaS?

- Tip: Bundling services can offer more value and convenience

Awareness and Need Questions

What challenges are you currently facing with your VoIP/UCaaS systems?

- Tip: Identify specific pain points to address directly with your solutions.

What are your biggest priorities this year in terms of communication and collaboration tools?

- Tip: Align your solutions with their strategic goals.

Have you used VoIP or UCaaS services before? If yes, what was your experience?

- Tip: Previous experiences can highlight what they liked or disliked, guiding your pitch.

Are you currently using a CRM system? If so, which one?

- Tip: Knowing their CRM system allows you to propose solutions that integrate seamlessly.

Do you require your VoIP/UCaaS system to integrate with your CRM?

- Tip: Addressing integration needs upfront prevents future surprises and ensures a smooth setup.

How are you currently handling click-to-dial functionality within your CRM?

- Tip: Identifying their current methods helps tailor your solution to their existing workflows.

Do you use Microsoft Teams for internal communication and collaboration?

- Tip: Understanding their use of collaboration tools helps in proposing comprehensive solutions.

Would an integration between your VoIP/UCaaS system and Microsoft Teams be beneficial for your team?

- Tip: Highlighting integration benefits can drive interest in comprehensive solutions.

What other tools or software do you use daily that you would like to integrate with your VoIP/UCaaS system?

- Tip: Exploring their full tech stack allows for proposing a more integrated, efficient solution.

How do you currently track customer interactions and communication history?

- Tip: Understanding their tracking methods helps identify gaps that an integrated solution can fill.

Have you faced any issues with your current setup where an integrated solution could have helped?

- Tip: Past issues can highlight the need for integration and drive interest in a more holistic solution.

Would you like to schedule a review of your current systems to identify potential integration opportunities?

- Tip: Offering a review positions you as a proactive partner interested in their long-term success.

How important is it for your communication tools to sync with other business applications?

- Tip: Emphasizing the importance of sync helps justify the need for integration.

▾ Advancement and Closing Questions

How do you prefer to receive updates and follow-ups from us?

- Tip: Respecting their communication preferences ensures smoother interactions.

Do you see our VoIP/UCaaS solutions fitting well with your current tech stack?

- Tip: Compatibility can be a major selling point.

What concerns do you have about switching to a new communication system?

- Tip: Addressing concerns early can prevent roadblocks later.

If we can address your main concerns, would you be ready to move forward?

Tip: This question can help gauge their readiness to close.

▾ Tips and Tricks

- Quick Tip: Always listen more than you speak. Use the 70/30 rule – let the customer talk 70% of the time.
- Quick Tip: Personalize your approach based on their responses to show genuine interest in their specific situation.



By asking these targeted questions and utilizing tips and tricks, MSP partners can effectively uncover their customers' needs and pain points, particularly around VoIP and UCaaS services.

