SUCCESS.co

CLIENT QUESTIONNAIRE

Ready to Switch?

A quick check on how well your current EOS® software is working for your team.

COMPANY

DATE

CONTACT NAME & ROLE

CURRENT EOS SOFTWARE

How to use this questionnaire

Go through it together as a conversation. Scores run from 0 to 100. A lower score means more pain with the current setup, and a stronger case for switching.

1. **Fill in the details above.** If the team runs EOS on spreadsheets or documents, answer every question for that setup.
2. **Part 1: Your current EOS software.** For the 1–10 ratings, circle or X the number the client gives; that number is the points. For the other questions, tick the answer that fits best.
3. **Part 2: Pain points.** For each pain point, tick one box: Not a problem, Sometimes or Big pain.
4. **Score it.** Write the points for each answer in its Points box, add up Parts 1 and 2 on the Scoring page (out of 100) and find the next step.
5. **Have the conversation.** Ask the conversation starters (not scored) and write the answers down word for word.
6. **Plan the follow-up.** Use the guide on the last two pages to choose what to demo first and to answer common concerns.

Tip: Write the answers down in the client's own words so you can come back to exactly what matters to them.

PART 1

Your current EOS software up to 40 points

Circle or X the client's rating for questions 1 to 3; the number is the points. Tick one answer for question 4. Write the points in each Points box.

> If the team runs EOS on spreadsheets or documents, answer for that setup.

1 Overall, how would you rate your current EOS software from 1 to 10? POINTS ____

Poor 1 2 3 4 5 6 7 8 9 10 Excellent

Points = the number circled

2 How does your team feel about your current software, from 1 to 10? POINTS ____

Poor 1 2 3 4 5 6 7 8 9 10 Excellent

Points = the number circled

3 How well does it help your team actually learn and adopt EOS, from 1 to 10? POINTS ____

Poor 1 2 3 4 5 6 7 8 9 10 Excellent

Points = the number circled

4 How often do bugs, slow loading or glitches get in the way, especially during meetings? POINTS ____

- ☐ Rarely — 10 pts
- ☐ Sometimes — 5 pts
- ☐ Often — 0 pts

Questions 1–4 **Part 1 total** ____

PART 2

Pain points up to 60 points

For each one, how much does it cost your team today? Tick one box per row.

#	PAIN POINT	NOT A PROBLEM 10	SOMETIMES 5	BIG PAIN 0
5	Running the meeting and keeping track of IDS, To-dos and Headlines takes too much time and attention	☐	☐	☐
6	Entering Scorecard numbers by hand every week	☐	☐	☐
7	Pulling together a snapshot of how the company and each team is doing	☐	☐	☐
8	Copying To-dos into your project management tool (Asana, ClickUp, Monday, etc.)	☐	☐	☐
9	Taking notes and capturing what was decided	☐	☐	☐
10	Following up on Rocks and To-dos between meetings so nothing slips	☐	☐	☐

Questions 5–10 **Part 2 total** ☐

SCORING

Add it up total out of 100

A lower score means more pain with the current setup, so a stronger case for switching.
Parts 1 and 2 are scored; the conversation starters are not.

STEP 1 Add up both parts

In Part 1, copy the four Points boxes across: questions 1 to 3 score the number circled, and question 4 scores the points next to the answer ticked. In Part 2, each “Not a problem” is 10 points, each “Sometimes” is 5 and each “Big pain” is 0.

Part 1: Q1 ☐ + Q2 ☐ + Q3 ☐ + Q4 ☐ = ☐ / 40

Part 2: Not a problem ☐ × 10 + Sometimes ☐ × 5 = ☐ / 60

Total score ☐ out of 100

STEP 2 Find the next step

Circle the band the total falls in.

0–44	**Ready to switch**	Book a live demo now, start the 30-day trial with their own data, and offer free migration.
45–74	**Some friction**	Worth a demo. Send the instant live demo and focus on their top 2 pain points.
75–100	**Happy for now**	Stay in touch. Share The Practice Builder and EOS guides; check in before their renewal.

NOT SCORED

Conversation starters

Write their answers down word for word, so you can come back to exactly what matters to them.

1 **If you could fix one thing about how your team runs EOS today, what would it be?**

2 **Which features on your current platform are you paying for but not using, especially non-EOS ones?**

3 **How are you using AI in your meetings today (notes, To-dos, summaries)? What's worked and what hasn't?**

4 **What would have to be true for you to switch?**

5 **Who else would be part of the decision?**

6 **What worries you most about switching to a new platform?**

FOR THE PERSON RUNNING IT

Pain point to demo

Start with the pain points the client marked as a big pain: show that part of Success.co first, and use these lines in your own words.

IF THIS IS A BIG PAIN	WHAT YOU CAN SAY
Low ratings in Part 1 (adoption, learning EOS)	"Success.co teaches EOS inside the app with short Mastery courses, so new people learn the tools while they use them. And your V/TO and Accountability Chart are one click away during the meeting, so the vision stays in the room."
Bugs or slow loading	"It's built to be fast, and it keeps working offline, so a bad connection won't stall your L10. There are desktop and mobile apps too."
Running meetings and tracking IDS	"The L10 runs in one flow: timers keep each section on track, and Issues, To-dos and Headlines all sit in the same screen, so whoever's running it can focus on the conversation instead of the software."
Scorecard entry by hand	"Your Scorecard numbers can come in automatically from the tools you already use, through integrations and the API, and you can even update them by asking an AI assistant like ChatGPT or Claude. No more typing them in every week."
Company snapshot	"Insights shows the health of the whole company and each team in one place: health scores, meeting ratings and Rock completion. You see how everyone's doing without building a report."
To-dos into project tools	"To-dos sync both ways with Asana, ClickUp, Monday.com and Teamwork.com, so nobody copies them over by hand and updates show up in both places."
Taking notes	"AI picks up To-dos and Issues as they come up in the meeting, so nobody is stuck taking notes and nothing that was decided gets lost." (This is in beta.)
Follow-up between meetings	"Rocks have milestones, so you can see progress between meetings. You can capture Issues and To-dos straight from Slack or Microsoft Teams, and they sync with your calendar and task list, so nothing slips."

FOR THE PERSON RUNNING IT

Common concerns

What to say when these come up.

CONCERN	WHAT TO SAY
“Migration will be a lot of work”	It’s free. Success.co’s desktop importer moves data from Ninety, Bloom Growth or EOS One in about 15 minutes, or the Success.co team does it for you in 7–10 business days.
“We’ll lose our history”	Rocks, Issues, To-dos, Scorecard history, the V/TO and the Accountability Chart all come over.
“The team won’t adopt another tool”	Success.co is built to be simple and fast, and Mastery teaches EOS inside the app. Second Life Mac had 100+ people using it within a week.
“What if it doesn’t work for us?”	30-day free trial, no credit card, and a 100% money-back guarantee for the first 12 months.
“Our implementer uses another tool”	Implementers get a free account and the Implementer Hub; invite yours to the demo.

NEXT STEP

See Success.co in action

The EOS software your team will actually use.
Officially licensed by EOS Worldwide and built with experienced EOS Implementers.

- ✔ 30-day free trial, no credit card
- ✔ Free migration from your current tool
- ✔ 100% money-back guarantee for the first 12 months

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