The Customer Survey Manual

How to monitor customer experience, detect problems and turn feedback into action

How to use this manual

Most customer surveys are conducted online and run repeatedly. They monitor KPIs such as customer satisfaction, NPS, customer effort, onboarding or support experience. When a score falls or a customer reports a serious problem, the survey acts as an early warning and tells management where to investigate.

Organizations also use ad hoc surveys when they need information about a particular decision or change, for example to follow up on a product launch. This manual covers both uses, but its main focus is building a reliable online survey programme that can operate continuously across customer touchpoints.

It is written for managers responsible for customer experience, marketing, service, product development or business performance. You do not need to be a statistician. Each chapter explains what to do, what to monitor and how to turn a signal into action.

The governing principle Begin by defining either the customer experience you need to monitor or the decision you need to support. Then ask only the questions that serve that purpose.

The seven-step process

Step	Purpose	Your output
1. Define what to monitor	Choose the experience, KPI or decision the survey should support.	A half-page survey brief
2. Choose the survey	Match a recurring or ad hoc survey to the purpose.	A measurement plan
3. Select recipients	Reach the customers or contacts who had the relevant experience.	An eligibility and contact rule
4. Design the questionnaire	Ask clear questions that respondents can answer accurately.	A tested questionnaire
5. Collect responses	Make participation easy and monitor who is missing.	A trustworthy response set
6. Interpret results	Recognize important patterns without overreacting to small changes.	Decision-ready insight
7. Act and follow up	Assign action and determine whether conditions improve.	A closed feedback loop

What a survey can and cannot do

A survey can show how customers evaluate an experience and alert the organization when something changes. It does not always explain why. Combine feedback with relevant operational data, such as purchases, churn, support cases, delivery performance and product usage, and investigate important signals before deciding what caused them.

Contents

1. Define what to monitor or decide

Before writing questions, decide whether the survey will monitor an important customer experience over time or answer a particular business question. This keeps the questionnaire focused without assuming that management already knows which problem the survey will uncover.

Two useful starting points

Recurring monitoring	Ad hoc investigation
Track a stable KPI or touchpoint and detect deterioration early.	Collect information for a defined decision, change or problem.
Examples: customer satisfaction, NPS, onboarding, support and delivery.	Examples: evaluate a proposed service change or investigate a recurring complaint.
The survey runs on a schedule or after a customer event.	The survey normally runs for a defined period.
A result can trigger an alert and further investigation.	The findings directly inform the defined decision.

Define the purpose

For a recurring survey, name the experience or risk that management needs to monitor, the KPI that will indicate change and who should respond when an alert is triggered. For an ad hoc survey, describe the decision and the information management needs.

Vague purpose	More useful purpose
Understand customer satisfaction	Track overall satisfaction quarterly and investigate sustained deterioration.
Evaluate onboarding	Ask every newly onboarded customer about ease, clarity and remaining problems.
Measure loyalty	Monitor willingness to recommend and identify recurring issues associated with low ratings.
Evaluate support	Measure satisfaction after closed support cases and alert the service owner to critical responses.

Turn the purpose into a survey plan

1. Name the customer experience, KPI or decision the survey will support.
2. Identify the customers or contacts who have the relevant experience.
3. Choose the main measure and the few questions needed to explain it.
4. Decide what customer data already exists in CRM or operational systems.
5. Define who will receive an alert and what should happen next.

Example Purpose: monitor onboarding. KPI: customer effort. Diagnostics: clarity of instructions, access, responsibilities and remaining problems. Alert: notify the onboarding lead when a customer cannot complete the process or gives a critical rating.

Define what requires attention

A recurring survey needs simple rules for when management should look more closely. This may be a serious individual response, a sustained fall in a KPI, an increase in negative comments or a difference affecting an important customer group. A signal is a reason to investigate, not automatic proof of the cause.

- Primary outcome: the measure that most directly reflects the purpose.
- Diagnostic measures: questions that help explain the primary outcome.
- Operational measures: relevant facts from other systems.
- Decision rule: what finding would justify action, further investigation or no change.

Complete the survey brief

Field	Question to answer
Purpose	What experience, KPI, risk or decision will this survey support?
Owner	Who is accountable for the decision and the follow-up?
Target group	Whose recent experience is relevant?
Primary measure	What is the main outcome we need to understand?
Diagnostics	What might explain that outcome?
Other data	What do CRM, support, product or financial systems already tell us?
Timing	When must the insight be available?
Alert and action	Who should be notified, and what should happen next?

2. Choose the right survey

Online surveys can run on a schedule, after a customer event or for a defined ad hoc purpose. Use an overall score to monitor development, supported by focused diagnostic questions that explain specific experiences and identify opportunities for improvement.

What the survey measures

Relationship surveys

A relationship survey measures the customer's overall experience of the organization rather than one recent interaction. It is normally sent at a stable interval to relevant contacts. Use stable KPI questions, such as overall satisfaction or NPS, and analyze trends across time and important account groups. The findings support broader priorities for customer experience, service and account management.

Transactional surveys

A transactional survey measures a defined interaction, such as onboarding, delivery or support. Keep it short and ask soon after the customer can evaluate the outcome. Analyze results by touchpoint, process, team or customer group where relevant. Individual critical responses can trigger customer follow-up, while recurring patterns can guide operational improvements.

The customer journey perspective

The customer journey perspective brings together feedback from different stages and touchpoints, such as onboarding, support and renewal. It is not a separate survey type, but a way of combining relationship and transactional surveys to understand the customer experience as a whole. For reliable analysis, define the journey stages clearly, use consistent customer or account identifiers, coordinate reporting periods and include some common questions or KPIs across the surveys.

When collection begins

A scheduled survey is sent at a fixed interval and is well suited to recurring relationship KPIs. An event-triggered survey is sent automatically after a known customer event and is well suited to transactional measurement. An always-available feedback channel lets customers initiate feedback whenever they choose. Use those voluntary responses to detect issues and collect explanations, while scheduled or event-triggered surveys provide the more systematic KPI measurement.

Recurring or ad hoc

A recurring survey uses stable questions, timing and dashboards to track development and detect change. An ad hoc survey runs for a limited period to investigate a particular question or proposed change. Either can measure a relationship or transaction, although recurring programmes are usually more valuable for ongoing management.

Select a metric by what it measures

Measure	Useful for	Do not assume
CSAT	Satisfaction with a defined product, service or interaction.	That it measures loyalty or the entire relationship.
CES	Perceived ease or difficulty of completing a task.	That an easy experience is always satisfying or valuable.
NPS	A standardized indication of willingness to recommend.	That it explains causes or universally predicts growth.
Overall satisfaction	A broad evaluation of a specified relationship or experience.	That it identifies what should change.
Behavioral intention	Reported likelihood to renew, return or expand.	That stated intention is the same as actual behavior.

Use NPS carefully

Net Promoter Score is calculated by subtracting the percentage of respondents who select 0 to 6 from the percentage who select 9 or 10. Scores of 7 or 8 are included in the denominator but not in either percentage.

NPS is simple and widely recognized, which makes it useful for consistent monitoring. It is not a complete loyalty measure and should not be treated as a diagnosis. Research has not established that NPS is universally superior to other satisfaction or loyalty measures.

- Keep the wording, scale and eligible customer group stable when tracking trends.
- Ask a focused follow-up, such as “What is the main reason for your rating?”
- Examine the full 0 to 10 distribution, not only the final score.
- Connect the score with actual retention, expansion or referral data where possible.

- Compare markets cautiously because response styles and recommendation norms may differ.

A better question Do not ask which metric is best in general. Ask which measure gives management the information needed for this decision.

Create a measurement plan

For a recurring survey, define the core KPI, frequency or trigger, recipients, diagnostic questions and alert owner. For an ad hoc survey, define the main measure and only the questions needed for the decision. In both cases, a focused questionnaire is more useful than one that touches every possible topic.

3. Select the right recipients

Most customer surveys should invite all eligible customers or contacts who had the experience being measured. The important question is not whether the survey represents a demographic population. It is whether the right customers receive it consistently.

Define who should receive the survey

Use a simple eligibility rule. Examples include all active customer contacts, everyone who completed onboarding, all customers whose support case was closed, or customers approaching renewal.

Example eligibility rule Invite every customer contact who completed onboarding during the previous week.

Invite all eligible customers when practical

For recurring online surveys, sampling is usually unnecessary. Configure the platform to invite every eligible contact after the relevant event or at the agreed interval. Sampling is mainly a special case for very large customer populations or situations where frequent invitations would create excessive survey fatigue.

Choose the correct unit

In B2B feedback, decide whether the unit is a person, contact, account, site or organization. Inviting five contacts from one account and one contact from another gives the first account more influence unless the analysis accounts for that structure.

- Use individual-level analysis when each person's experience is the subject.
- Use account-level analysis when management decisions concern the customer organization.
- If several contacts represent one account, decide how their responses will be combined or weighted.

Check the survey rule and contact data

Before launch, confirm that the right event or schedule triggers the survey, that the appropriate customer contact is used and that invalid or duplicate invitations are controlled. Check whether the process systematically misses customers handled through another system or journey. Once the rule works, let the platform apply it automatically and review it periodically.

Monitor who responded

Response rate is useful, but it does not tell the whole story. Check whether the people responding are the customers or contacts who experienced the touchpoint. Look more closely only at business characteristics that could plausibly change the experience, such as customer role, product, service model or stage in the relationship.

Do not write "The response rate was high, so the results are representative." Report who was invited, who responded and which important groups may be underrepresented.

Avoid survey fatigue

- Coordinate surveys across departments and touchpoints.
- Set contact rules for how frequently the same person may be invited.
- Use existing operational data instead of asking customers to repeat known facts.
- Stop recurring invitations when the experience is no longer relevant.
- Give participants evidence that previous feedback produced action.

4. Design a questionnaire people can answer

Good questions are clear, natural and easy to answer. For a recurring survey, keep the core KPI questions and scales stable so results remain comparable. For a new or ad hoc survey, begin with the information the organization needs.

Use a clear questionnaire structure

1. Brief introduction: purpose, sponsor, expected time and how responses will be used.
2. Eligibility or routing: confirm that the respondent has the relevant experience.
3. Core measure: ask the stable KPI or central evaluation early in the survey.
4. Diagnostics: include only the questions needed to explain the result.
5. Open follow-up: invite the main explanation or improvement suggestion.
6. Classification: ask only information not already available elsewhere.
7. Close: thank the respondent and explain what happens next.

Write one clear question at a time

Problem	Weak wording	Improved wording
Two subjects	How satisfied are you with our product and support?	How satisfied are you with the product? Ask support separately.
Undefined term	Was delivery fast?	How satisfied are you with the time from order confirmation to delivery?
Leading wording	How helpful was our excellent support team?	How helpful or unhelpful was the support you received?
Assumption	Why did you find onboarding difficult?	How easy or difficult was it to complete onboarding?
Vague recall	How often do you have problems?	During the past three months, how often did you encounter a problem?

Build response options that fit the question

- Make categories mutually exclusive. A response should not fit two options.
- Cover all reasonable answers.
- Use balanced positive and negative options when measuring evaluation.
- Label scale points clearly enough that respondents interpret them consistently.
- Include “not applicable” when the experience may genuinely not apply.
- Include “don’t know” when a respondent may reasonably lack the information.
- Do not use an agreement scale when a direct evaluation, frequency or likelihood question is clearer.

Avoid making questions mandatory unless the survey cannot serve its purpose without an answer. Use routing and “prefer not to answer” where appropriate.

Use open questions selectively

Open questions can reveal causes, language and problems the questionnaire did not anticipate. They also require more effort and are harder to analyze consistently.

Purpose	Suggested wording
Explain a score	What is the main reason for your rating?
Identify improvement	What is the one thing we could improve?
Find friction	Where, if anywhere, did you encounter difficulty?
Capture missing issues	Is there anything important that we did not ask about?

Ask for one focused response rather than “Any other comments?” after every section. If comments will be connected to an identified account, say so.

Keep burden proportionate

Keep the survey focused and state an honest completion time.

- Remove questions that are not connected to the survey’s purpose.
- Use CRM and operational data instead of asking for information already known.
- Show only questions relevant to the respondent through routing.
- Check every page on a mobile phone.
- Use progress indicators only when they are accurate and helpful.

Test before launch

First, complete the preliminary survey yourself on both a computer and a mobile phone, then ask a couple of colleagues to test it. Next, send it to a couple of customers with whom you have a good relationship. Ask how they interpret the questions, whether the wording feels natural and whether any response option is missing. Customer testing can reveal internal terminology that seems clear to colleagues but may be misunderstood outside the organization.

When establishing a KPI survey that will be used for several years, run a small pilot before launch. Correcting a weak question later may break the comparison with earlier results.

5. Collect trustworthy responses

Online collection makes it possible to trigger surveys after customer events, automate reminders and send important responses to the right person. Timing, sender and technical design still influence who participates and how they answer.

Write an invitation that earns attention

The invitation should make the request credible and easy to evaluate. Include:

- Who is asking for feedback
- Why this customer was invited
- What experience the survey concerns
- How the feedback will be used
- A realistic completion time
- Whether responses are anonymous, confidential or identified
- A clear link and, where applicable, a response deadline
- A contact or privacy link where appropriate

Example invitation

Subject: Help us improve customer onboarding You completed onboarding with [Company] recently. We would value your feedback on what worked and what could be improved. The survey takes approximately four minutes. Your responses will be connected with your customer account so that we can understand the experience and follow up where appropriate. Please respond by [date].

Choose timing deliberately

- Send transactional surveys after the customer can evaluate the outcome.
- Avoid long delays that weaken recall.
- Consider business cycles, holidays and periods of unusual disruption.
- Keep recurring relationship surveys at comparable times when seasonal effects are plausible.
- Record changes in timing so they are not mistaken for changes in experience.

Use reminders without creating pressure

Send reminders only to non-respondents where the system permits. The reminder should be shorter than the original invitation and repeat the value, completion time and closing date. Excessive reminders can damage the customer relationship and may overrepresent reluctant respondents who answer with low effort.

Choose anonymous or identified responses

Use anonymous responses when the organization does not need to identify or follow up with individual customers. Use identified responses when account-level analysis, alerts or personal follow-up are part of the purpose. Removing the name question is not enough to make a survey anonymous: unique links, connected account data, metadata and comments may still reveal the respondent. Use a professional online platform, such as Questback, to apply the appropriate settings and access controls, and describe the arrangement honestly to customers.

Configure useful alerts

An alert should lead to a defined response, not simply create more email. Decide who should be notified when a customer gives a critical rating, leaves a serious comment or when a recurring KPI deteriorates. Set an owner and expected response time, and avoid reacting to every small fluctuation.

Monitor response collection

Monitor	Question to ask
Delivery	Were invitations delivered, blocked or sent to outdated contacts?
Participation	Which invited groups have and have not responded?
Completion	Where do respondents leave the questionnaire?
Time	Are extremely fast completions suggesting low effort?
Patterns	Are repeated identical answers plausible, or do they suggest that someone selected the same option without reading the questions?
Open text	Are comments meaningful, empty or copied?
Alerts	Are critical responses reaching the right owner?

Quality rule Do not change wording, routing or scale during collection unless a serious error makes it necessary. If you must change something, document when it changed and evaluate whether the data can still be combined.

6. Interpret the results responsibly

For a recurring survey, analysis should show whether the KPI is stable, improving or deteriorating and what may explain the pattern. For an ad hoc survey, it should answer the questions in the survey brief.

Prepare the data

1. Remove test responses, obvious duplicates and responses that do not belong to the survey.
2. Review missing answers and incomplete questionnaires.
3. Check improbable or contradictory response patterns.
4. Confirm how accounts with several respondents will be represented.

Look beyond the average

An average can conceal polarization. Two customer groups may have the same mean while one is consistent and the other contains both highly positive and highly negative experiences.

- Show the number of valid responses.
- Examine the distribution across response options.
- Report percentages for meaningful categories where useful.
- Use medians when the center of an ordered distribution is more informative than the mean.
- Inspect comments and operational evidence alongside scores.

Treat small differences cautiously

A common mistake is to overinterpret small changes or differences, especially when few customers responded. Check whether the pattern continues and whether the customers responding this time differ from those who responded previously. If an important decision depends on a small difference, ask a statistician to check it. Questback can provide this type of support.

A signal is a starting point A falling KPI or low rating tells you where to look. It does not automatically explain what caused the change.

Compare groups for a reason

Compare customer groups only when the difference could help management investigate or act. Searching every possible split increases the chance of finding accidental differences.

- Use business-relevant groups such as product, region, account stage or customer size.
- Check whether groups differ on other characteristics that might explain the result.
- Avoid ranking small groups from best to worst without uncertainty and context.
- Do not treat correlation as evidence that changing one score will cause another to improve.

Interpret open comments systematically

1. Read a varied selection of comments and group recurring issues into clear themes.
2. Link important themes to ratings, customer groups and operational data where useful.
3. Check that selected quotations represent the wider pattern and remove unnecessary identifying information.

Automated text analysis can support classification and discovery, but important conclusions should be reviewed by a person who understands the customer context.

Build a decision-ready report

Report layer	Include
Executive summary	KPI signal or main finding, limitations, priority and recommended action.
Core results	Primary measure, distribution, trend and relevant segments.
Explanation	Diagnostics, comments and connected operational evidence.
Method	Eligible customer group, invitation count, response count, dates, wording and limitations.
Action	Owner, next step, deadline and measure of improvement.

7. Turn feedback into action

Feedback creates value when it triggers appropriate attention, supports a decision or confirms that an important customer experience remains stable. In a recurring programme, collection and action form a continuous cycle.

Use surveys as an early-warning system

1. Collect feedback continuously or at a stable interval.
2. Monitor the KPI, response distribution and serious individual responses.
3. Alert the appropriate person when a defined signal appears.
4. Investigate comments, customer data and the underlying process.
5. Decide and assign an action when the evidence justifies it.
6. Continue measuring whether the situation improves.

Separate individual recovery from systemic improvement

Individual recovery	Systemic improvement
A customer needs contact or resolution.	A recurring pattern requires a change to product, policy or process.
Act quickly and assign a case owner.	Validate the pattern and investigate root causes.
Record what was done and whether the issue was resolved.	Assign an improvement owner, resources and a measure.
Protect the customer’s data and preferences.	Monitor whether the intervention changes the outcome.

Prioritize what to address

Do not prioritize solely by the lowest score. Consider:

- Importance to the customer and the business
- Number and type of customers affected
- Severity and urgency
- Evidence that the issue influences the desired outcome
- Ability to change the underlying process
- Cost, risk and dependencies
- Whether the problem is recurring or temporary

Investigate causes before prescribing solutions

A low score identifies where to look. It rarely proves why the problem exists. Use comments, customer conversations, process data and discussions with customer-facing teams to test possible explanations. Distinguish a symptom, such as poor onboarding satisfaction, from causes such as unclear responsibilities, delayed access or insufficient training.

Create an action plan

Field	Example
Finding	New administrators report difficulty completing initial configuration.
Evidence	Low ease score, repeated comments and support contacts during week one.
Desired outcome	Administrators complete configuration without avoidable support contact.
Action	Test a guided checklist and clearer ownership messages.
Owner	Customer onboarding lead.
Deadline	Pilot launched by 15 November.
Measure	Completion rate, repeat contacts and transactional CES.
Review	Compare pilot and current process after six weeks.

Close the feedback loop

Tell customers what was learned and what will happen. Communication should be proportionate and honest. Do not claim that every suggestion will be implemented.

- Thank customers and acknowledge the main themes.
- Explain which issues will be addressed first.
- State what requires further investigation.
- Explain important constraints where appropriate.
- Report progress when actions are completed.

Measure whether action worked

Do not rely only on a better survey score after implementation. Check whether the operational outcome also improved. Whenever possible, compare similar groups, preserve the measure and consider factors other than the intervention that changed during the period.

Example If onboarding was redesigned, track completion, time to value, support demand and retention alongside customer feedback. A higher satisfaction score is more convincing when the customer's actual experience also improved.

Build a recurring feedback system

A recurring programme should be easier to operate than a series of isolated surveys. Configure the eligibility rules, triggers, stable questions, dashboards and alerts once, then review periodically that they still work as intended.

- Maintain an approved question library and measurement definitions.
- Coordinate survey timing and contact frequency.
- Use roles and permissions to control access.
- Automate appropriate invitations, reminders and alerts.
- Connect feedback with customer and operational data.
- Give managers relevant dashboards rather than unrestricted raw data.
- Track actions, owners and follow-up measures.

Practical templates

Template 1: Survey planning brief

Complete before writing questions	Your answer
Experience, KPI or decision	
Programme or decision owner	
Eligible customers or contacts	
Primary outcome	
Diagnostic information needed	
Existing operational data	
Timing or trigger	
Follow-up and action owner	
Privacy and access arrangements	

Template 2: Relationship survey blueprint

Adapt this structure to the decision. Do not include every question by default.

Purpose	Example question
Overall evaluation	Overall, how satisfied or dissatisfied are you with [Company] as a business partner?
Value	How would you rate the value your organization receives from [product/service]?
Ease	Overall, how easy or difficult is it to do business with us?
Confidence	How confident are you that [Company] can meet your organization’s needs during the next 12 months?
Recommendation	How likely are you to recommend [Company] to a colleague?
Main reason	What is the main reason for your rating?
Priority	What is the one thing we could improve that would make the greatest difference to your organization?

Template 3: Transactional survey blueprint

Purpose	Example question
Confirm experience	Which part of the onboarding process did you complete?
Outcome	Were you able to achieve what you needed to do?
Ease	How easy or difficult was it to complete the process?
Satisfaction	How satisfied or dissatisfied were you with this onboarding experience?
Diagnostic	How clear were the instructions and responsibilities?
Explanation	Where, if anywhere, did you encounter difficulty?
Improvement	What is the one thing we could improve?

Template 4: Questionnaire quality check

☐ Every question supports a defined learning need.
☐ Each question asks one thing.
☐ The experience and time period are clear.
☐ Wording is neutral and understandable.
☐ Response options do not overlap and cover reasonable answers.
☐ “Not applicable” and “don’t know” are used where needed.
☐ Sensitive and difficult questions are not unnecessarily mandatory.
☐ Routing has been tested for every relevant path.
☐ The survey works on a mobile phone.
☐ A couple of customers have tested how they interpret the questions.
☐ You have decided how the main results will be reviewed.
☐ Privacy, access and follow-up statements are accurate.

Template 5: Results interpretation check

☐ The eligible customer group and valid response count are stated.
☐ Respondents have been compared with the invited customer group where useful.
☐ The distribution is examined, not only the average.
☐ Small changes and differences are not overinterpreted.
☐ Changes in timing, wording, scale or channel are disclosed.
☐ Correlation is not described as causation.
☐ Comments are analyzed systematically, not selected to support a preferred story.
☐ Limitations are clear enough for management to judge the evidence.

Template 6: Action record

Field	Complete
Finding and affected customers	
Evidence and limitations	
Cause to investigate	
Decision or action	
Owner	
Deadline	
Operational measure	
Feedback measure	
Review date and result	

When a professional feedback platform becomes necessary

A basic online form may be enough for an occasional, low-risk questionnaire. The need changes when feedback becomes a recurring management process across teams, markets, touchpoints and customer groups.

Signs that manual processes are no longer sufficient

- Different teams ask similar questions with inconsistent wording and scales.
- Customers receive overlapping invitations from several departments.
- Contact lists, translations and reminders require extensive manual work.
- Managers need different levels of access to results and comments.
- Feedback must be connected with CRM, support or operational data.
- Dissatisfied customers require alerts, ownership and documented follow-up.
- Results must be compared reliably across time, regions or business units.
- Open comments are too numerous to review consistently by hand.
- Management needs dashboards and action tracking rather than static reports.
- Privacy, security and retention requirements exceed what ad hoc tools can manage safely.

The practical question Do you merely need to create a survey, or do you need to manage feedback as a repeatable business process?

How Questback can support the process

Questback is designed for organizations that need to collect, analyze and act on customer and employee feedback in a structured way. A professional platform can help standardize questionnaires, coordinate distribution, apply access controls, create relevant reporting and connect feedback with the people responsible for action.

The correct solution depends on your feedback programme, data environment, markets and governance requirements. Use the planning brief in this manual to describe what you need before evaluating a platform.

Your next step

Select one important customer experience, KPI or decision. Complete the survey planning brief and test the full cycle from invitation or trigger to reporting, alert and action. If the process must operate across several teams or customer groups, involve the people responsible for data, customer relationships and implementation from the beginning.

Discuss your feedback programme Questback can help you assess how to collect trustworthy customer feedback, make results available to the right people and establish a repeatable process for action. Visit questback.com to learn more.

Sources and further reading

This manual translates established survey methodology into practical business guidance. The following sources informed the principles and qualifications used throughout.

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Legal and regulatory requirements vary. Organizations should obtain appropriate advice for their markets, data and use cases.