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| --- |
| **For internal use only** |
| Prepared by | Date |
| Reviewed or updated by | Date |

Company Information

|  |
| --- |
| Company Name |
| Primary Point of Contact | Title |
| Phone | Email |
| Technical/Secondary Contact | Title |
| Phone | Email |
| Type of Business | No. of Employees / Locations |
| Additional Notes |

Questions to start the discussion and begin to understand their business challenges:

Learn what they do and how they work with their clients or essential business relationships.

|  |
| --- |
| Describe a typical client or business engagement |
|  |
| Are your engagements ongoing? |
|  |
| How often do you usually interact with them? |
|  |
| Do all your staff easily see the client history and details they need? |
|  |
| What are the most critical components of your client engagements? |
|  |

Understand what information is vital for them and how they manage it today.

|  |
| --- |
| How are you managing information today? |
|  |
| What software is in use? (remain conversational and avoid a laundry list/interrogation feel) |
| CRM/Contact Management |  | Accounting |  |
| Email |  | Quoting/Estimating |  |
| Scheduling/Routing |  | Project Management |  |
| Other |
| Do you have any specific challenges?  |
|  |
| What is the most important information that should be tracked and managed?  |
|  |
| What are some of your challenges or improvements that could help your team and client engagements? |
|  |
| Are there workflows, projects, or processes that get repeated regularly? |
|  |
| If workflows, project, or processes are automatically triggered, would it improve efficiency? |
|  |
| Do you have field techs/reps that deliver services to clients? Please describe the process: |
|  |
| Main requirements or functionality that you are looking for: |
|  |
| Main benefits expected/desired from this system and how would that affect your company: |
|  |

Potential triggers that drive a need (check all that apply)

|  |  |  |
| --- | --- | --- |
| Triggers | Yes | No |
| Expanding the team / Scaling for rapid growth |  |  |
| New business |  |  |
| Expanding service offerings |  |  |
| Client service scores – Reviews, Trust Pilot, Client dissatisfaction |  |  |
| Too much reliance on paper – Ready to digitize and automate |  |  |
| Too disconnected information and repetitive processes |  |  |
| Improve visibility of information |  |  |
| Business is too inefficient – Need help scaling and driving down costs |  |  |

Integrations and specific functionality requirements

|  |  |  |
| --- | --- | --- |
| Functionality Requirements | Yes | No |
| Synchronizing with QuickBooks accounting? |  |  |
| Will benefit from Sales History Management in Results? |  |  |
| Need Product/Invoice/Payments Management in Results? |  |  |
| Needs to Manage Projects? |  |  |
| Uses Field Service Technicians? |  |  |
| Has complex Sales and Use Tax requirements? |  |  |
| Other/Notes:  |

User requirements / Proposal details

|  |  |
| --- | --- |
| Number of Results Users | Quantity |
| CRM |  |
| Sales |  |
| Business |  |
| Platform |  |
| FSM Stand-Alone |  |
| FSM Add-On |  |
| Time Sheets Add-On |  |

|  |  |
| --- | --- |
| Integrations | Yes |
| QuickBooks Online |  |
| QuickBooks Desktop |  |
| Outlook/Exchange |  |
| AvaTax by Avalara |  |
| Zapier |  |
| Gmail |  |
| Text/Messaging |  |
| WhatsApp |  |
| Calendly |  |

Sales process / Company details

|  |  |
| --- | --- |
| Time Frame |  |
| Budget |  |
| # of Employees/Users |  |
| Company Revenue |  |
| Decision-Making Process |  |

Additional notes / Red flags / Customizations / Process requirements

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| --- |
|  |