QuickStart for Microsoft Business Solutions CRM Proof of Concept

Customer Questionnaire

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[Date]

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Revision History

Date	Comments	Editor
[Document Date]	Initial Version	[Consultant Name]

Legal Notice

Customer Name: ______________________________

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Consultant Name(s): ________________________________
Consultant Alias(s): ________________________________
Engagement Dates: ___________________________

Purpose: The purpose of this questionnaire is to ascertain mid-level business requirements that will need to be gathered in order to deploy a meaningful proof of concept solution. We will be collecting information around the following areas:

- Sales and business process(s)
- Data requirements,
- Organization structure,
- Users and their roles,
- Security model,
- The knowledge level of the team that will participate.

Please fill out these questions so that the development environment can be set up and the POC tailored to your needs.

Leads

Question	Answer
Do you have a method of tracking potential business before concluding that there is a possibility of creating a business relationship with either individuals or accounts?	
Do you think tracking leads is useful?	
What characteristics might you want to capture?	
What marketing sources does your company use to attract leads?	
What marketing literature does your company use?	
Do you import lists of leads?	
What metrics do you track for lead	

management?	

Opportunities

Question	Answer
Do you have a sales method to track potential deals that you are working on with your customers (new or existing)?	
Do you have some sales stages that your sales team follows?	
Could you benefit from selecting values (for the potential sale) and probabilities for each opportunity?	
Do you schedule activities around these potential deals?	
Are there some characteristics that you may want to capture for opportunities?	
Can you forecast closure dates for your opportunities so that you can get an accurate picture of what type of business may be occurring in a specific time frame?	
Can you forecast revenue and probability of closure so that you can get an accurate forecast?	
Describe the typical customer.	

Accounts

Question	Answer
Do you track information about accounts (companies)? If so what characteristics are important?	
Where is the information about accounts kept?	
Do you categorize accounts (use account types)?	
Do you track accounts by territory?	
What characteristics for accounts would you like to capture?	
What methods of communication do you use to keep in touch with your accounts?	
Define an account.	

Contacts

Question	Answer
Do you do business with individuals or with companies?	
Do you track contacts currently? What characteristics are important? (For example: first name, last name, address, or e-mail address?)	
What characteristics for contacts would you like to capture? Do you track any demographic information, for example gender, education, or things like spouse's and children's names?	
Where are you tracking contacts, if you track them?	
What methods of communication do you use to keep in touch with your contacts?	
Define a contact.	

Competitors

Question	Answer
Do you track competitors? Do you want to track them?	
What information do you track? Are there characteristics you want to capture?	
If you track them, where do you store this data? Can it be formatted and entered into Microsoft CRM?	
Do you have sales literature (theirs or information you've created) that helps address customer concerns during sales?	
Do you associate competitors with products of yours to understand how they compete?	
Who should maintain competitive information?	

Products

Question	Answer

What products do you sell?	
What system are they in?	
Are your products grouped?	
What price lists does your company maintain for pricing your products?	
For each price list, what are the products and prices within?	
For each product on the price list, will there be volume discounts associated?	
Do you have units of measure (units) defined?	
Do you track serial numbers for the products sold to your customers?	
What type of warranties do you provide for your products?	
Do you track warranty start and end dates?	
Do you track owner asset tag numbers?	

Sales Literature

Question	Answer
Do you have sales literature (for example, brochures, pictures, or any type of marketing materials) that you send out to customers?	
Where do you store this literature? Is it electronic? Does a third-party print it for you?	
Can it be incorporated into Microsoft CRM?	
Do you want to develop literature that you can send out to prospects in either electronic or paper form?	
Should someone be in charge of this, or can anybody add new literature?	

Quotes

Question	Answer
Do you use quotes currently?	
Do you have a need for quotes?	

Is there specific information needed in quotes that we need to add?	
Is a quote template of use to you? Who will be responsible for templates?	

Orders

Question	Answer
Will salespeople be able to enter valid orders that can be accepted by your Microsoft Business Solutions system?	
Will you interface orders to another system either electronically or manually?	
Are there other characteristics within an order that you need to capture?	
What processes need to take place before an order is ready to be finalized and inventory can be selected? Are there controls on the Sales side? What controls are imposed by either the nature of the product or your organization?	

Invoices

Question	Answer
Does your Microsoft Business Solutions system have customizations to invoices? If so, it is important for salespeople to see them in the Microsoft CRM application?	
If you do not have a Microsoft Business Solutions system, do you want to enter invoices in Microsoft CRM?	
Are there changes that need to be made to invoice forms to suit your purposes?	

Activities

Question	Answer
Do you keep track of the activities or events that salespeople participate in that generate new business or sales?	

What types of activities do your salespeople participate in?	

Cases

Question	Answer
Do you have a service organization that fields calls or e-mails relating to product questions, defects, and other customer service issues?	
Do you have a call center that handles both customer service and sales calls?	
Do you have different levels of service contracts that relate to the different types of service that you provide?	
Do you field calls by phone or e-mail?	
In what ways do you assign and categorize your service calls? For example, do you categorize by subject, stage, priority, or service level?	
Do you have time-sensitive calls that may require attention if certain actions are not performed within time limits?	
How do you assign calls to customer service representatives (CSRs)?	
Do you link service cases to products?	

Knowledge Base

Question	Answer
Do you have a knowledge base?	
How is your knowledge base organized? Do your answers have sections? If so, what are they?	
Do you categorize your knowledge base? (Microsoft CRM requires answers to be categorized into subjects.)	
Do you have a record of frequently asked questions?	

Contracts

Question	Answer
Do you track service contracts? Electronically?	
Will you want to have contracts in Microsoft CRM going forward?	
What are your current contracts and respective data about that contract?	
Are products tied to a contract?	
Are contacts associated with contracts?	
What contract types do you track?	
How do you define your service calendars?	

Home Page Announcements

Question	Answer
Do you have a need to broadcast messages to your customer relationship management (CRM) users?	
Who should maintain messages?	

Reports

Question	Answer
What types of information will be important to capture in reports?	
Do you have sample reports that you will need, either for service or sales?	
What type of metrics do you intend to capture for internal reporting?	
Will you be doing any external reporting?	

Organization

Question	Answer
How are your Sales and Service organizations set up?	
Do you have an Organization chart?	
Have you thought about visibility rules, for example, should a CSR see all cases within the company, within his/her	

department, or only his/her own?	
Who are the employees/users within your company? How many will be set up on the system?	
Do you have multiple business units?	
Do you utilize teams of resources?	

Team Knowledge Assessment

Please list the team members who will participate in the POC and their relative level of experience with the following products and technologies. Please note the knowledge level as None, Beginner, Intermediate, or Expert.

Name	Role	CRM Experience	Sales	Marketing	Service	IT Infrastructure

Thank you for taking the time to fill in this valuable information. Please forward any architectural diagrams, special requirements, or other information you believe will be useful to the lead consultant.