



## CRM Needs Analysis Questionnaire

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Please tell us about your customers

**Who buys your products/services? Please describe your typical prospect in some detail.**


**How do you acquire these prospects?**

- Cold calls? ( Y / N )
- Tradeshows? ( Y / N )
- Web Site? ( Y / N )
- Purchased Lists? ( Y / N )
- Personal Visits? ( Y / N )
- References? ( Y / N )

**How do you initiate first contact with these leads?**

- Phone? ( Y / N )
- Email? ( Y / N )
- Mail? ( Y / N )
- Personal Visit? ( Y / N )
- Combinations of the above ( Y / N )

**If an initial literature package is sent, who sends it?**


**Do you have a method of determining the conversion rate of leads to orders?** ( Y / N )

If **YES**, what percentage of your leads result in sales orders? \_\_\_\_%

**Do you have a method of determining the original source of the leads that were converted to orders?** ( Y / N )

If YES, what are the top two methods of prospecting that are most successful to your organization?

1. _____
2. _____



**Please attach some examples of the literature you send to prospects. Attached? (Y/N)**

**What is your customer buying cycle? Please describe your typical prospect in some detail.**


Sales cycles usually fall into three broad categories:

- Short buying cycle
- Long and complicated buying cycle
- Continuous buying cycle

**Think about your typical sale. What is the length of your sales cycle, the total time from initial contact to placing the first order? (Check all that apply)**

- Order placed on first contact
- 1 Day
- 2 days - 1 week
- 1 week - 2 weeks
- 2 weeks - 1 month
- 1 month - 3 months
- 3 months - 1 year
- Longer than 1 year

**What processes are involved in your sales cycle? Please describe the steps taken from prospecting to order placement in great detail.** (Telephone calls, qualification, documents required, personal visits, quotations, demos, etc)




**Once you have a qualified sales lead, do you manage and monitor this sales process until you get an order?** ( Y / N )

If **YES**, please describe how?


**Are you comfortable that ALL prospects are being followed up and supported in an acceptable amount of time?** ( Y / N )

If **NO**, where in the process is the problem created?


**Does your sales staff deal with a single decision maker or many contacts at a sales account?**

- Single
- Multiple Contacts

**What percentage of your sales are repeat business vs. new?** \_\_\_\_%.

If you do not know please estimate, **check here**

**On average, how much business do you do with each customer in a typical year?**

Volume \_\_\_\_ (number of order)

Revenue \$ \_\_\_\_\_

**How many accounts does each sales person manage currently?** \_\_\_\_\_

**How many new leads do you acquire per month?** \_\_\_\_\_

**To meet your corporate growth objectives, how many new customers do you need to acquire annually?** \_\_\_\_\_

**What percentage of your prospects do you successfully convert to customers?** \_\_\_\_%

**What activities after the sale do you pursue with your customers?** Please describe the steps taken after a purchase has been made to cross sell, up-sell and support your clients.




**What percentage of your customer contact is through:**

- Outbound telephone \_\_\_\_\_% Check here if not applicable
- Inbound telephone \_\_\_\_\_% Check here if not applicable
- Mail \_\_\_\_\_% Check here if not applicable
- eMail \_\_\_\_\_% Check here if not applicable
- Personal Visit \_\_\_\_\_% Check here if not applicable
- Website \_\_\_\_\_% Check here if not applicable
- Text Chat \_\_\_\_\_% Check here if not applicable

**Does your organization prepare quotes or proposals within the sales cycle?** ( Y / N )

If **YES**, please describe in detail this process including who is involved.

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Please tell us about your products

**What do you sell?** (If possible, please include brochure and sample information.)

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**Do you manufacturer your own products?** ( Y / N )

**Do you ship your own products?** ( Y / N )

If **YES** do you have multiple warehouses? ( Y / N )

**What information do your customers expect you to have immediately on hand about your products\services?**

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**What other information would it be nice for you to have on your products\services?**

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**Tell Us About Your Sales Team**

**How many sales staff does your company employ? \_\_\_\_\_**

**Describe their typical background (education, work experience, etc.)?**

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**Describe the sales training provided for your sales team?**

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**How long does it typically take to get a sales rep up to speed and productive? \_\_\_\_\_**

**What is the average cost of training per sales employee? \$\_\_\_\_\_**

**Do you currently follow a specific sales methodology? ( Y / N )**

**Describe how your sales team hierarchy is structured? (attach organization chart if possible)**

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**What are the primary responsibilities of each of the above team members? Please include actual job descriptions if they exist.**

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**Do you have remote (out of office) sales staff?** ( Y / N )  
If **YES**, please provide number of remote locations \_\_\_\_\_

**Where does your sales team actually perform their sales tasks?**

- Remote Office
- Home
- Airplane
- Car
- Customer site
- All of the above

**Of the following items, what do you think your sales team would personally hope to achieve from your CRM initiative?** (Check all that apply) \*\* Rank in order of importance 1 being most important. \*\*

- Improve productivity
- Improve frequency of contacts with customers
- Improve frequency of contacts with prospects
- Increase closing rates
- Shorten selling cycle
- Increase personal earnings
- Decrease time spent on grunt work

**When would you hope to achieve these objectives?** \_\_\_\_\_

**Do your sales teams currently have a working knowledge of a word processor or spreadsheet?** ( Y / N )

If **YES**, which ones? \_\_\_\_\_

**Describe how they are used?**


**Do you already have the support of the sales team for this project, or is it being "suggested" to them?** ( Y / N )

**Would you say that your sales team is a happy and productive group?** ( Y / N )  
If **NO**, what are some of the problems you need to deal with?




## Tell Us About Your Management Team

**Please provide a detailed organization chart of your management team.** Please attach

**What information would permit your management team to do a better job in their areas?**


**What information do you think your sales team wishes they had from these functional managers?**


**To help you close more orders, what information does the sales team wish it had at their fingertips?**


**Does your sales team have any after sale accounting responsibility, bill collecting, etc.?**  
( Y / N )



Tell us about your marketing team

**Do they currently communicate well with the sales team?** ( Y / N )

If **NO**, describe where you see the breakdown in communication?


**Are your marketing initiatives easily accessible to your sales and support staff regardless of the method of communication (email, mail, ads, press, etc)?** ( Y / N )

**Does your organization know what marketing materials are being sent to which customers?** ( Y / N )

**Describe your typical marketing methods.** (lists, send mail, follow up with cold calls etc)


**Is this CRM project being launched in conjunction with any new marketing projects?**

( Y / N )

If **YES**, please provide as many details as possible so that we can explore how the CRM system might enhance these efforts.




## Tell Us About Your Existing Business Applications

**What accounting software are you currently using?** \_\_\_\_\_

**Do you hope to interface your CRM software with your accounting software?** ( Y / N )

If **YES**, please describe the areas where you see integration to be important?


**Are you currently using a CRM solution?** ( Y / N )

If **YES**, what solution are you currently using? \_\_\_\_\_ Version: \_\_\_\_\_

**What are the shortcomings of this product?**


**What area(s) does your current CRM software satisfy your needs?**




Please select any other Business Management Applications you are using.

- Warehouse Management      Name: \_\_\_\_\_
- Human Resources      Name: \_\_\_\_\_
- Manufacturing      Name: \_\_\_\_\_
- Data Analysis      Name: \_\_\_\_\_
- EDI      Name: \_\_\_\_\_
- Reporting Tools      Name: \_\_\_\_\_

### Tell Us About Your Competitors

**Who are your main competitors?** Please provide a thumbnail sketch of each.


**Describe their competitive strengths and weaknesses over your organization?**


**Where do you rank in your industry relative to your competitors?** \_\_\_\_\_

**Are you aware of any CRM efforts at your competitors?** ( Y / N )

If **YES**, describe any details you may have?




**Have you given any thought to how a CRM system might help you better understand and sell against your competitors?** ( Y / N )

If **YES**, how do you see applying CRM for competitive information?


**To shed some more light on your competitive environment, how would you characterize your total industry in terms of:** (please circle one in each row)

Total demand?	a) growing	b) stagnant	c) declining
Competition?	a) fierce	b) moderate	c) mild
Threat of new competitors?	a) high	b) moderate	c) low
Supplier power? (how powerful are suppliers in your industry?)	a) high	b) moderate	c) low
Buyer Power? (how powerful are buyers in your industry?)	a) high	b) moderate	c) low
Availability of substitutes? (buyers' ability to substitute your industry's products)	a) easy	b) somewhat difficult	c) very difficult
Threat of substitute technology?	a) high	b) moderate	c) low
Major basis of competition (how do various firms try to increase sales?)	a) product innovations	b) pricing /promotion	c) better service

**How has your firm's performance been for the last three years:**

- Growing
- Declining
- Stagnant
- Other \_\_\_\_\_

**Can you attach a percentage to the above assessment?** ( Y / N ) \_\_\_\_\_%



## Final Thoughts

**Why do you want to implement a CRM system?**


**Describe the business issues you are trying to resolve?**


**Please add any final comments or pertinent information.**
