

Client Questionnaire

CRM INTEGRATION / SALES AUTOMATION

Please answer as many of the following questions as you can.

1. **How do you first interact with potential customers?** (circle all that apply)
 - a. Phone call
 - b. Website form
 - c. In-person at our office
 - d. In-person at a show or meeting
 - e. In-person somewhere else (Location: _____)
 - f. Something else (Explain: _____)
2. **Approximately how many people contact you per day?**
3. **Which way is the most common for people to contact you?**
4. **Which way do you prefer for people to contact you?**
5. **Do you currently use any Customer Relationship Management (CRM) Software?**
 - a. Yes | No | I don't know
 - b. If so, what is it? _____
 - c. If so, what do you like/dislike about it?
6. **Why are you interested in a new CRM and adding automation to your sales process?**

Client Questionnaire

7. Do you have a specific goal you hope the new software will help you achieve?
8. How many people will be using the new software regularly, and what are their roles (salesperson, deliveries, secretary, Accounts Receivable, etc.)?
9. Briefly describe how and where you currently store contacts / customers:
10. Briefly describe your current sales process, from the initial contact with a potential customer up to (or beyond) the time the sale is completed and picked up / delivered / finished:
11. What are the key parts or stages of this process (e.g., collect a deposit, design meeting, delivery, etc.)?
12. What are the gaps or problems with your current sales process (if any)?
13. Anything else you would like to add?