**New Client Questionnaire for General Business Understanding and Opportunity Discovery:**

**Identify customer’s decision making process and key influencers:**

* In addition to yourself, who else will be involved in making this decision?
* What is your process for moving forward with projects like this one?
* What do you look for when selecting vendors? What’s most important: Price, resourcefulness, quality of engineers, manufacturers supported, or….?

**Identify customer’s environment (servers, storage and applications):**

* What mission critical applications do you rely on and how do they relate back to revenue for the company?
* Where is the greatest threat for lost data, security breaches, and downtime?
* We found that most of our customers are concerned about investment protection, cost containment and ease of use. What do you think?

**Identify the top pain points to uncover as many sales opportunities as possible:**

* What are your primary business challenges, issues or concerns?
* How is that affecting revenue? Profits? Customer service? Your competitiveness in the marketplace? Productivity?

**Identify the customer’s current vendor and partner preferences for servers, key applications, database tools, backups, vendors, etc. then ask:**

* Why do you use (or prefer) that vendor?
* What do they do well? What don’t they do well?

**General information you should research prior to the meeting or ask the client:**

* How many locations? Where are, they headquartered?
* Who is the CEO, CFO, CIO? VPs? Key managers and department heads?
* Who are their competitors? Do they have or use any technological advantages over their competition?
* Are they planning on moving or opening a new office anytime soon?
* How many users are on the network?
* What growth is expected in the next 12 to 24 months?
* Do you use technology more than you did 5 years ago? If so, do you think you will be using technology more 5 years from now?
* Do you have any budgeted IT projects this year? What is the status on those projects?
* Did you make a large IT purchase in the last 6 months? If so what was it?
* What do you look for in your vendors that you work with?
* How do you know measure your vendors?
* How do you know you are getting what you paid for from your vendors?

## MANAGED SERVICES/NETWORK MANAGEMENT:

* What tools do you use now to manage your network?
* Do you have any mission critical servers that you can’t afford to have down?
* How do you manage installing and monitoring security patches for your desktops and servers?
* Do you use any centralized network management tools? If yes, are you happy with them?
* Would you like to have a tool that provided 24/7 notifications on key network errors and problems?
* Do you feel that you can “PROACTIVELY” manage your network?
* Do you feel that your network is 100% secure? Why or why not?
* Does your current IT plan have a checklist of activities/tasks each week, month and quarter?

**BACKUP/STORAGE:**

* Do you have a disaster recovery plan?
* How do you back up all your servers and desktops?
* Have you ever tested it or just done a full restore from your backups?
* How do you back up your remote users?
* We found that most of our customers are concerned about investment protection, cost containment and ease of use. What do you think?
* Would you be interested in a Disaster Prevention and Recovery assessment at no charge?

**SECURITY:**

* Do you have a formal security policy documented?
* Do you allow free e-mail (Hotmail, etc.) and instant messaging? If so how do you manage this?
* Do you have a written AUP in place for your employees?
* What firewall and/or VPN products do you use?
* Antivirus solution
* Anti-Spam
* Remote users on the network?
* For remote users, what firewalls do they have?
* What Government regulations are you concerned about?
* Do you have any wireless users on your network?

**CRM AND VOIP:**

* What is your current Phone system? PBX or VOIP?
* Do you make a high volume of calls from your offices? Between offices or to customers?
* How do you keep your customer files / contact info / quotes today?
* Do you have a high turnover rate?
* Who is your SP? Are you under contract?
* How do you fax your customers today? Via desktop or fax machines?
* How many phone lines? Backup lines? faxes? Analog devices?
* How does the Marketing team track the success rate of your marketing campaigns? Do they have a CRM system they use? If so what kind is it? How many users?

**POWER:**

* Do you ever have problems with power in the building? How about brownouts or blackouts?
* Do you have battery backup? Have you ever tested it?
* If you are predicting a lot of growth, you probably are under powered -
* Is your phone system part of the battery backup solution? What about the handsets?
* Would you be interested in a power vulnerability assessment at no charge?

**NOTES:**