

Corporate <> CreditBPO Pre-Meeting Form

Do help us with information needed to ensure our presentation & demo align with your Corporate's needs and industry best practice
(Strictly Private and Confidential)

The respondent's email (**fruiteriajuices@gmail.com**) was recorded on submission of this form.

Your Business Email *

fruiteriajuices@gmail.com

Organization Name *

Fruiteria Juices Inc

Corporate Website url *

https://www.fruiteriajuices.com/

Q1: What are your current financial assessment and accreditation practices of suppliers and vendors? *

☐ In-house tools

☒ External services

☐ Not performed

☐ Other:

Q2. What is the Frequency of conducting Financial Condition Assessments and accreditation of suppliers and vendors? *

- ☐ Monthly
- ☐ Quarterly
- ☐ Annually
- ☒ As needed

Q3. Key Challenges in Financial Condition Assessment of Suppliers and Procurement Risk Management *

- ☐ Data accuracy
- ☐ Timeliness
- ☐ Cost
- ☒ Comprehensive Analysis
- ☐ Other:

Q4: What improvements are you seeking? *

- ☐ Faster processing
- ☒ More detailed reports
- ☐ Cost reduction
- ☐ Better procurement risk mitigation
- ☐ Other:

Q5: What department do you head or manage?

- ☒ Finance
- ☐ Procurement
- ☐ Risk Management
- ☐ Operations
- ☐ Sales and Marketing
- ☐ Human Resources
- ☐ IT and Technology
- ☐ Other:

Q6: When are you planning to begin implementation of AI-driven technology solutions * to address these challenges?

- ☐ Immediately
- ☐ Within 3 months
- ☐ 3-6 months
- ☒ More than 6 months



Q7: Approximately, how many suppliers or vendors does your department accredit or review every month (whether renewals or new)?

- ☐ 0 - 5
- ☒ 6 - 15
- ☐ 16 - 30
- ☐ 31 - 50
- ☐ More than 50

Additional Comments:

For any other relevant information you wish to share that would help align our presentation to focus on your org needs.

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The respondent's email (**rhbernal@firstbalfour.com**) was recorded on submission of this form.

Your Business Email *

rhbernal@firstbalfour.com

Organization Name *

First Balfour, Inc.

Corporate Website url *

https://t1rentals.com/

Q1: What are your current financial assessment and accreditation practices of suppliers and vendors? *

☒ In-house tools

☐ External services

☐ Not performed

☐ Other:

Q2. What is the Frequency of conducting Financial Condition Assessments and accreditation of suppliers and vendors? *

- ☐ Monthly
- ☐ Quarterly
- ☐ Annually
- ☒ As needed

Q3. Key Challenges in Financial Condition Assessment of Suppliers and Procurement Risk Management *

- ☐ Data accuracy
- ☐ Timeliness
- ☐ Cost
- ☐ Comprehensive Analysis
- ☒ Other: Data availability, Market conditions, Credit risk assessment, Comprehensive analysis

Q4: What improvements are you seeking? *

- ☐ Faster processing
- ☐ More detailed reports
- ☐ Cost reduction
- ☐ Better procurement risk mitigation
- ☒ Other: More detailed reports, Better procurement risk mitigation

Q5: What department do you head or manage?

- ☐ Finance
- ☒ Procurement
- ☐ Risk Management
- ☐ Operations
- ☐ Sales and Marketing
- ☐ Human Resources
- ☐ IT and Technology
- ☐ Other:

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