[](http://www.pentaho.com/) ***Client Qualification Overview:***

**Company: Canoe Ventures**

**Date: 03-13-2012**

**SC: Natalie Kambak**

**Need:** Evaluating the complete BI Suite (all modules?) or a specific module(s) If so, which ones:

ex: Analysis/Mondrian, Reporting/JFree, Dashboards, Data Integration/Kettle, Data Mining/Weka?

**Project:** How do you see BI adding value/fitting into the product

* How are they doing XYZ today?
* What problems are they trying to solve and why?
  + Who is affected by lack of information, etc., what is the result?

**Integration:** DBs, Where does the information currently reside?

**Deployment:** Hosted or on-premise deployment?

**Product Business Model:** perpetual/subscription model?

**Timeframe/Milestones:** (tool evaluation period, selection date)

* Anyone going on vacation? Going to be unavailable during a key time in the evaluation/sales process?

**Other BI/Competitors:** (What other BI solutions are used and being evaluated and why?)

* Any in-house champions on a particular product?

**Evaluation and Process:** How far into your evaluation of Pentaho have you gotten so far?

* Definition of Success?
* KPI’s?
* Metrics? What is important, to whom and why?
* **Value Proposition?**
* **Deal Breakers?**
  + **“Mr. Client is there anything that I don’t already know about this project that could prohibit it from closing on the agreed upon date”?**

**Next Step**: What are the immediate next steps and milestones you are looking to accomplish toward making a decision?

**Budget:** Is there a budget? Budgeting for next year? Where is the money coming from?

**Decision-maker(s):** Who will be leading this evaluation?  Recommenders vs. Decision Makers? Who will be making the ultimate decision on a BI tool? Who else needs to be involved? Signing Authority/Spending Limits?

**Procurement Process:** Does it need to go through Legal? How long does that take? Breakdown the process.

* Will all the key players be around? Vacation? Half Days? Etc.