

# Company Questionnaire — DEMA Group Unified Platform

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## How to use this document

- This questionnaire is designed to collect consistent inputs from all companies and all departments.
  - Use the parts below depending on the audience:
    - **Part 1:** 10-minute employee survey (broad coverage, non-technical)
    - **Part 2:** Department interview templates (45–90 minutes, with subquestions)
    - **Part 3:** Management strategy decision questionnaire (forces explicit choices)
  - Keep answers concrete. When possible, ask: “Show me the last time you did this.”
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## Part 1 — 10-minute Employee Survey (non-technical)

### A) Your role

1. Which team are you on?
  - Sales
  - Purchasing
  - Warehouse
  - Customer Support
  - Finance
  - Management
  - Other:
2. How often do you interact with customers?
  - Daily
  - Weekly
  - Rarely
3. How do you spend most of your time?
  - Answering questions
  - Creating quotes
  - Ordering stock
  - Picking/packing
  - Fixing issues (returns/errors)
  - Other:

### B) Biggest pains (rank)

4. Pick your top 3 biggest pains today:
  - I can't quickly find product info (specs, docs, images)
  - Stock info is often wrong or unclear
  - Prices are hard to calculate / lots of exceptions
  - Quotes take too long
  - Customers call/email too much for basic info
  - Shipping is unpredictable
  - Returns take too long
  - Too much copying/pasting between tools

- Other: \_\_
5. For each pain you selected, give an example from the last 2 weeks.
- Example 1: \_\_
  - Example 2: \_\_
  - Example 3: \_\_

## C) What “good” looks like

6. If we could fix ONE thing in the next 3 months, what should it be?
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7. What should never change because customers like it?
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8. If a customer could self-serve better online, what would they do without calling you?
- Check stock
  - Check delivery date
  - Find the right product
  - Download datasheets
  - Reorder
  - Request a quote
  - Other:

## D) Basic systems (no jargon)

9. What tools do you use every day? (name them)
- Tool 1:
  - Tool 2:
  - Tool 3:
10. When something is wrong (wrong price, wrong stock, wrong invoice), who can fix it?
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## E) Readiness

11. When is your busiest period (when changes are risky)?
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12. How comfortable is your team with learning a new tool?
- Very comfortable
  - OK
  - Difficult
13. Anything else we should know?
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## Part 2 – Department Interview Templates (45–90 minutes)

Use both styles: - **Simple wording**: for non-IT stakeholders. - **Follow-up (more detailed)**: when you talk to ops/IT or when answers are vague.

### A) Sales / Quoting Interview

#### 1) How selling works today

- Simple wording

- Walk me through what happens when a customer asks for a price.
- What is the first thing you do?
- What do you do if the customer needs the product fast?
- **Follow-up (more detailed)**
  - Quote vs order ratio?
  - Typical quote turnaround time?
  - What data do you need before a quote can be confirmed?
- **Subquestions**
  - Show me the last 3 quotes. What was hard about them?
  - What are the top 10 questions you always ask customers?
  - What makes a quote “urgent” and how is it handled?

## 2) Pricing rules

- **Simple wording**
  - Do different customers get different prices?
  - Who is allowed to change prices?
- **Follow-up (more detailed)**
  - Discount matrices? customer-specific pricing? contract pricing?
  - Special approvals?
- **Subquestions**
  - Show me the price list(s).
  - How do you store exceptions?
  - What causes pricing errors most often?

## 3) Customer experience

- **Simple wording**
  - What do customers complain about?
  - What do customers ask for that we don't provide online?
- **Follow-up (more detailed)**
  - Key accounts list and their special requirements.
- **Subquestions**
  - Which customers buy from multiple group companies already?

# B) Purchasing Interview

## 1) Buying stock

- **Simple wording**
  - How do you decide what to buy and when?
  - Where do you look to see what we need?
- **Follow-up (more detailed)**
  - Reorder logic (min/max, forecast, manual)?
  - Supplier lead times and reliability?
- **Subquestions**
  - What are the top 10 suppliers?
  - Which products have the most supply issues?

## 2) Supplier data

- **Simple wording**
  - Where do supplier product lists and prices live?
- **Follow-up (more detailed)**

- Supplier feeds (CSV, portals, EDI)?
- **Subquestions**
  - How often do prices change?
  - Are there restrictions on showing prices online?

## C) Warehouse / Logistics Interview

### 1) Stock truth

- **Simple wording**
  - If I ask: “Do we have this item?”, how do you check?
  - How do you know if stock is wrong?
- **Follow-up (more detailed)**
  - Stock update frequency and source of truth.
  - Multi-warehouse or drop-ship flows.
- **Subquestions**
  - Top 5 reasons stock is wrong.
  - What is the cut-off for same-day shipping?

### 2) Shipping & tracking

- **Simple wording**
  - How do packages leave the building?
  - How does a customer get a tracking number?
- **Follow-up (more detailed)**
  - Carriers used and tracking integration capabilities.
- **Subquestions**
  - Show me the last shipment with a problem.

### 3) Returns

- **Simple wording**
  - What happens when a customer returns something?
- **Follow-up (more detailed)**
  - RMA process, restocking, warranty.
- **Subquestions**
  - Top return reasons.

## D) Customer Support Interview

### 1) Support demand

- **Simple wording**
  - What do customers contact you about most?
- **Follow-up (more detailed)**
  - Ticket categories and volumes.
- **Subquestions**
  - If the website/API improved, which calls would disappear?

### 2) Knowledge and product info

- **Simple wording**
  - Where do you find answers when you don’t know?
- **Follow-up (more detailed)**

- Datasheets, manuals, compatibility rules.

- **Subquestions**

- What information is missing most often?

## E) Finance Interview

### 1) Invoicing & payments

- **Simple wording**

- Who invoices the customer and how?
- What causes invoice mistakes?

- **Follow-up (more detailed)**

- Payment terms, credit limits, dunning.

- **Subquestions**

- What must be true before an order can be shipped?

### 2) VAT & compliance

- **Simple wording**

- Are there special rules for certain customers?

- **Follow-up (more detailed)**

- VAT rules, exemptions, intra-EU.

## F) IT / Operations Interview (if applicable)

### 1) Systems map

- **Simple wording**

- What are the main systems you use, and what does each one do?

- **Follow-up (more detailed)**

- ERP name/version, hosting, customizations.
- Integration options (API, exports, SFTP).

- **Subquestions**

- Do you have a test environment?
- Who can approve changes?

## Part 3 – Management Strategy Decision Questionnaire (options)

Answer these as a group leadership team. The goal is clarity, not perfection.

### A) Brand / Storefront strategy

Choose one: - Option A: One group storefront (single brand experience) - Option B: Multiple storefronts (per company brand), shared backend - Option C: Keep storefronts separate; only unify data/integrations first

Subquestions: - Why is this the right choice now? - What is the biggest risk of this choice? - What would force us to change this decision?

### B) Customer identity strategy

Choose one: - Option A: One customer account across all companies - Option B: Separate accounts per company, link later - Option C: No shared identity initially

Subquestions: - Who owns the customer relationship? - If one customer buys from 2 companies, what should their experience be?

## C) Commercial / invoicing strategy

Choose one: - Option A: Each company invoices separately - Option B: Group invoices centrally - Option C: Hybrid rules per customer segment

Subquestions: - How do credit limits and payment terms work? - Who handles disputes and returns?

## D) Data sharing boundaries

For each domain, decide: share group-wide / share partially / keep private. - Customers - Pricing - Margin - Supplier terms - Stock

Subquestions: - Who can view each domain? - Who can change it? - What is the approval process to change these rules later?

## E) Rollout and sequencing

- Which company is first and why?
- Which company is the most complex and why?
- What is the maximum acceptable disruption?

## F) Investment and constraints

- Budget range for the next 6 months:
- Internal staffing available (hours/week):
- Known blackout periods:

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## Suggested outputs to request from each company (artifact checklist)

Ask for anonymized examples. - 10 recent quotes (and what made them “quote-only”) - Latest price list(s) and discount rules - Product export (CSV/Excel) + category tree - Top 20 support questions - Last 10 returns and reasons - Shipment example with tracking - List of systems used and who owns them

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