

Company Questionnaire — DEMA Group Unified Platform

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:

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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