

Discovery Form

FILE by FIFO — Client Discovery

Fill in during sales meeting to understand client needs

Company Information

Field	Details
Company Name	
Contact Person	
Title/Position	
Phone	
Email	
Website	

Business Profile

Field	Details
Industry/Sector	
Location(s)	
Years in Business	

Employee Count

Range	Tick
0-20	[]
21-50	[]
51-100	[]
101-300	[]
301-500	[]
500+	[]

Exact number if known: _____

Current Process

How do you currently handle disciplinary warnings?

Option	Tick
Word templates	[]
Paper forms	[]
No formal process	[]

Option	Tick
Other HR software	[]
Excel tracking	[]

If using software, which one? _____

Pain Points

What challenges are you experiencing? (Tick all that apply)

Pain Point	Tick	Notes
CCMA concerns	[]	_____
Inconsistent manager handling	[]	_____
Lost/missing documents	[]	_____
Untrained supervisors	[]	_____
Language barriers	[]	_____
Scaling with growth	[]	_____
Time-consuming process	[]	_____
Employee disputes	[]	_____

CCMA Experience

Have you had any CCMA cases in the past 3 years?

Option	Tick
Yes	[]
No	[]

If yes, what was the outcome?

Outcome	Tick
Won	[]
Lost	[]
Settled	[]
Pending	[]

Details/Lessons learned: _____

Decision Making

Field	Details
Decision Maker Name	_____
Decision Maker Role	_____
Other stakeholders?	_____

Timeline

When are you looking to implement?

Timeline	Tick
Urgent (this week)	[]
This month	[]
This quarter	[]
Just exploring	[]

Budget

Is budget approved for this type of solution?

Option	Tick
Yes, budget available	[]
Need to get approval	[]
Unknown	[]

Competitors/Alternatives

Are you considering other solutions?

Option	Tick
No, only looking at File	[]
Yes, comparing options	[]

If yes, which ones? _____

Key Requirements

What's most important to you? (Rank 1-5)

Requirement	Rank
Ease of use	___

Requirement	Rank
Mobile access	_____
Language support	_____
Price	_____
Support/training	_____

Meeting Notes

Next Steps Agreed

Action	Who	When

Meeting Date: _____ | Sales Rep: _____

Form reference: FIFO-DISC-001