

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	<input type="checkbox"/>
21-50	<input type="checkbox"/>
51-100	<input type="checkbox"/>
101-300	<input type="checkbox"/>
301-500	<input type="checkbox"/>
500+	<input type="checkbox"/>

Exact number if known: _____

Current Process

How do you currently handle disciplinary warnings?

Option	Tick
Word templates	<input type="checkbox"/>
Paper forms	<input type="checkbox"/>
No formal process	<input type="checkbox"/>

Option	Tick
Other HR software	<input type="checkbox"/>
Excel tracking	<input type="checkbox"/>

If using software, which one? _____

Pain Points

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

Pain Point	Tick	Notes
CCMA concerns	<input type="checkbox"/>	_____
Inconsistent manager handling	<input type="checkbox"/>	_____
Lost/missing documents	<input type="checkbox"/>	_____
Untrained supervisors	<input type="checkbox"/>	_____
Language barriers	<input type="checkbox"/>	_____
Scaling with growth	<input type="checkbox"/>	_____
Time-consuming process	<input type="checkbox"/>	_____
Employee disputes	<input type="checkbox"/>	_____

CCMA Experience

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

Option	Tick
Yes	<input type="checkbox"/>
No	<input type="checkbox"/>

If yes, what was the outcome?

Outcome	Tick
Won	<input type="checkbox"/>
Lost	<input type="checkbox"/>
Settled	<input type="checkbox"/>
Pending	<input type="checkbox"/>

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