GoDeskless Qualification Questions for **Agent X,** *FIRST DRAFT*

A Complete Internal Framework for High-Impact Discovery → Custom Demo → Deal Progression → Closed-Won

1. Company Overview & Contact Info

Objective: Understand who they are, what they do, and who you're speaking with.

Account Information

- Company name:
- Company description (their words):
- Website:
- Industry:

Primary Contact

- Full name:
- Title/role:
- Responsibilities related to field operations:
- How did they hear about GoDeskless?
- "Can you give me a quick rundown of your company and what you do?"
- "Who are your customers today? What types of customers do you primarily serve?"
- "What motivated you to explore GoDeskless at this time?"

2. Customers & Service Model

Objective: Understand whom they serve, how they serve them, and ticket/job volume.

- "How many clients/customers do you manage today?"
- "What types of service requests do you handle? (Ad-hoc, contract, preventative maintenance, installations, warranty, repairs?)"
- "How do customers reach you today? (Phone, email, portal, walk-ins, internal request system?)"
- "Are any services delivered by subcontractors or 3rd parties? If yes, what percent?"

3. Evaluation Team & Decision Maker

Objective: Know who drives the decision, who influences it, and who could block it.

- "Who besides you will evaluate GoDeskless and provide input?"
- "Who ultimately signs off on the Yes/No decision?
- "Is there anyone who could say 'no' even if everyone else wants to proceed?"
- "Is IT involved? Finance? Operations leadership? Compliance?"

4. Current Field Operations Workflow

Objective: Understand how their field operations function today end-to-end.

- “Can you walk me through your current workflow from when a customer reaches out… all the way through job completion and close-out?”
- “How do dispatchers communicate with technicians today?”
- “How do technicians update job information, upload photos, or capture signatures?”
- “How do you currently handle scheduling, routing, and job assignments?”
- “What visibility does management have into job status in real time?”

Quantitative Data

- Number of field technicians:
- Number of dispatchers:
- Number of back-office/admin users:
- Geographic coverage (local/regional/national):
- Avg. jobs per day/week/month:

5. Current Systems (CRM, ERP, FSM, Homegrown)

<u>Objective</u>: Identify core systems and potential integrations

- “What systems or tools do you use today to run your field operations?”
  - CRM
  - ERP
  - Scheduling or dispatch tool:
  - Ticketing system:
  - Inventory/asset tracking:
  - Invoicing or billing:
  - Any homegrown systems?

- “What do you like about your current tools?”
- “Where are the limitations or gaps?”
- “Are there integrations that are mission-critical for your business?”

6. Problems, Frustrations & Goals (Use Cases & Needs)

<u>Objective</u>: Identify pains and desired outcomes to map to a tailored GoDeskless demo.

Pain Discovery

- “Where do you feel your current process breaks down?”
- “What are your biggest challenges with your current systems or workflow?”
- “Do these issues lead to delays, customer complaints, lost revenue, or rework?”
- “Can you share a recent example of when things didn’t go smoothly?”
- “Is there a financial or operational impact from the issues you described?”
- “If you had to estimate—what does that cost the business monthly or annually?”

Goal Discovery

- "What are your top 1–3 goals for improving your field operations this year?"
    - Reduce job cycle time?
    - Improve technician productivity?
    - Automate dispatching?
    - Increase customer satisfaction?
    - Standardize workflow?
    - Digital forms?
    - Better reporting/analytics?
    - Inventory & asset tracking?
    - AI-driven insights?

- "What would be possible for your team if you solved these problems?"

7. Competition & Alternatives

Objective: Understand what else they are evaluating.

- "Are you evaluating other solutions? Which ones?"
- "Where are you in the evaluation process?"
- "What selection criteria are most important for you?"
- "Is there a current front-runner?"

8. Budget & Pricing

Objective: Understand budget availability and pricing expectations.

- "Do you have a budget set aside for this project?"
- "If not, when will a budget be established?"
- "What is your process for getting software purchases approved?"
- "Do you currently pay for a field service tool? If so, do you know the approximate spend?"

Pricing Anchor

- "Our pricing ranges between $49–$129 per user per month depending on product mix.
  Once we understand your requirements, we'll tailor a recommendation."

9. Timeline & Compelling Event

Objective: Identify implementation urgency and project drivers.

- "When would you ideally like a new system in place?"
- "Is there a specific reason for that date? (Season, contract renewal, internal initiatives, current tool limitations, audit/compliance?)"
- "Are you facing any deadlines or operational pressures driving this decision?"
- "Typical deployments run 4–6 weeks—does that fit your expectations?"

10. Process & Mutual Plan

<u>Objective</u>: Align on steps between today and a signed contract.

- "What needs to happen internally between today and making a decision?"
- "Does your team typically require security reviews, legal review, IT review?"
- "We usually create a mutual plan outlining steps on both sides to ensure a smooth evaluation. If I send that after the call, can you review it for completeness?"

11. Customized Demo Preparation

<u>Objective</u>: Secure the next meeting and determine who should attend from their side.

- "To tailor the demo, who from your side should attend? (Ops, IT, Supervisors, Technicians)"
- "Are there specific workflows, reports, or scenarios you want us to show?"
- "Would you like us to include inventory management, assets, or e-invoicing?"
- "Do you want us to show AI features like predictive scheduling or intelligent routing?"

12. Next Step, Schedule the GoDeskless Demo

<u>Objective</u>: Lock down date/time during the call.
<u>Final Script:</u>

> *"Great, our next step is a customized GoDeskless demo built around your workflows and goals. Let's lock in a day and time that works for your team."*

Checklist

- Secure date:
- Secure time:
- Confirm all required attendees:
- Confirm calendar invite will be sent:
- Mention follow-up recap & mutual plan:

13. Additional Notes (Internal Only)

- Notes about tone, interest level, urgency:
- Potential upsell opportunities:
- Red flags:
- Contract complexity:
- Integration difficulty:
- Competitive threats: