INEX Systems Portal - Call Prep Sheet

Discovery Call Notes & Client Questionnaire

1. Current Tech Stack & Tools

Which apps/tools are you currently using for:
- Project/job management
- Scheduling/dispatch
- Client communication
- Inventory/RMA
- Training/onboarding
- Reporting/analytics

Which of these tools are most critical to daily operations?
Which ones are causing the most frustration for your team?
Are there tools you've been meaning to replace but haven't yet?

2. Cost & Maintenance

Do you know your current total software cost per month/year?
Do you have one vendor managing these tools, or multiple?
How often do you get outside help to connect/fix tools?

3. User Experience & Training

Do all team members use the tools efficiently?
How much time is spent training new hires on systems?

4. Desired Outcomes

If you could wave a magic wand, what would your ideal system do?
How important is INEX branding for client/partner perception?
Do you want client-facing features, internal features, or both?

Notes from Call: