Business Process Questionnaire

Microsoft Dynamics CRM 2013

Prepared for

Project

Prepared by

Contributors

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Marketing Organization and Processes

| Question | Answer |
| --- | --- |
| Define the marketing organization, including hierarchy, geography, experience, etc. |  |
| Define the marketing team. Who are the members of the team? |  |
| Describe how the marketing team operates (e.g. day in the life)? |  |
| How do you advertise? (E.g. radio, billboards, Internet, direct mail, etc.) |  |
| Do you purchase marketing lists? |  |
| How do you go to market? (i.e. direct mail, e-mail or fax blasts, events, Web request forms, etc.) |  |
| Do you currently use an e-mail marketing software application? |  |
| Do you currently use a mail house for distribution of direct mailings? |  |
| Do you plan and manage events? |  |
| How does marketing support lead generation? Are there marketing campaigns? |  |
| Do you get Internet-based leads? |  |
| Do you market to your existing customer base? Do you contact them for recurring business? |  |
| How do you plan and budget your marketing campaigns? |  |
| How do you track marketing costs, activities and schedules for each campaign? |  |
| Do you have the capability to define/refine/mix lists of prospects/accounts/contact for different campaigns? |  |
| Do you have a record of campaign responses from customers and/or prospects? Do you track promotion codes? |  |
| How do you measure campaign performance? Do you compare results against former campaigns? |  |
| How are prospect and buyer profiles maintained? What are the primary market trends and preferences that are analyzed within prospect and buyer profiles? |  |
| Do you have a customer referral program? |  |
| Do you manage Sales Literature and Collateral? |  |
| Do you currently market on the Internet using Microsoft Windows Live® Search, Google Search, eBay, etc? What do you do with leads that are generated this way? |  |
| What types of reports are used in relation to marketing automation? |  |

Sales Organization and Processes

| Question | Answer |
| --- | --- |
| Define the sales organization, including hierarchy, geography, etc. |  |
| Define the sales team. Who are the members of the team? |  |
| Describe how the sales team sells products and services (e.g. day in the life)? |  |
| How are your territories defined? How often do they change? |  |
| How does your sales team collaborate today? (e.g. across divisions, departments, product lines, etc.? |  |
| How does the sales force generate new leads? (e.g. cold calling, from marketing team, Website, research, etc.) |  |
| How does a customer or prospect contact you to get information? |  |
| How do you define a “lead”? |  |
| How do you track and record leads? |  |
| What items do you need to obtain about the lead during the sales process? |  |
| What steps are taken to turn a lead into a customer? What types of activities? |  |
| How are sales tracked to lead source? |  |
| Are the steps and outcomes in the sales process recorded somewhere as a record for others to see? |  |
| Who talks to potential customers? |  |
| When does information get shared so that other areas know that there is a potential customer? |  |
| How do you define a “customer”? |  |
| How long does it take before a new lead becomes a customer? |  |
| What type of data is collected about new or existing customers? |  |
| Do your salespeople follow scripts or other set dialogues based on certain responses? |  |
| Where is data stored and who is responsible for ensuring that the data is collected? Does anyone review the data? Are there specific reasons for various pieces of data that are collected? |  |
| Do you need to gather specialized information about the lead or customer in order to complete a sale? |  |
| Do you provide quotes to customers? If so, is there often a revision process? How does a quote become an order or an invoice? |  |
| Who prepares quotes? |  |
| Who prepares orders? |  |
| How do orders get from the Sales department to the fulfillment part of the business? How do orders move through to Accounting for invoicing? |  |
| Are your customers repeat customers? Why or why not? |  |
| Is cross-selling within your current customer base a priority? |  |
| What are your sales channels (i.e. direct by reps, through distributors or manufacturer’s reps, project based)? |  |
| Is the sales process different for existing customers than for potential customers? |  |
| Do you have multiple sales cycles dependent on product, revenue or some other factor? |  |
| What are the steps in your sales cycle(s)? |  |
| Do sales and marketing personnel have visibility into the process once an order is placed? |  |
| How do you forecast sales? |  |
| How are sales documents maintained (e.g. contracts, addendums, worksheets, change orders, etc.)? |  |
| Describe your biggest bottleneck(s) in the sales process. |  |
| What things need to change to make sales more effective? What things need to stay the same? |  |
| Can a customer place an order without involvement from a salesperson? How does this occur? |  |
| What criteria determine who is and who isn’t a customer? |  |
| Do you differentiate your customers by certain attributes (e.g. revenue, # of employees, type of customer)? |  |
| Do you classify customers into tiers? |  |
| Do you have goals at the salesperson, team, product, or business unit level? |  |
| How are those goals defined (revenue, units sold, etc.)? |  |
| What types of reports are used in relation to sales? |  |

Leads

| Question | Answer |
| --- | --- |
| Do you have a method of tracking potential business before concluding that there is a possibility of creating a business relationship with either individuals or accounts? |  |
| How are leads currently generated? |  |
| How are leads qualified? And by whom? |  |
| How are leads distributed? |  |
| Do you think tracking leads is useful? |  |
| What characteristics might you want to capture about leads? |  |
| Can potential customers submit Web-based inquiries to create leads? |  |
| What marketing sources do you use to attract leads? |  |
| What marketing literature do you use to attract leads? |  |
| Do you have a database of existing lead data? |  |
| Do you track the success rate of converting leads into opportunities/customers? |  |
| Do you have a method for organizing/classifying leads within your organization? |  |
| Will you be transferring this lead data to Microsoft Dynamics CRM? |  |

Accounts

| Question | Answer |
| --- | --- |
| Do you track information about accounts (companies)? If so, what characteristics are important? |  |
| Where is the information about accounts currently kept? |  |
| Do you categorize accounts and/or use account types? |  |
| Do you track accounts by territory? |  |
| What characteristics for accounts would you like to capture? |  |
| What methods of communication do you use to keep in touch with your accounts? |  |
| Do you have a database of existing account data? |  |
| Will you be transferring this account data to Microsoft Dynamics CRM? |  |

Contacts

| Question | Answer |
| --- | --- |
| Do you do business with individuals, with companies or with both? |  |
| Do you currently track contacts? What characteristics are important (i.e. first names, last name, address, e-mail address)? |  |
| What characteristics would you like to capture for contacts? Do you track any demographic information (i.e. gender, education, or details like spouse’s and children’s names)? |  |
| What methods of communication do you use to keep in touch with your contacts? |  |
| Where are you tracking contacts, if you currently capture them (list all sources)? |  |
| Will you be transferring this contact information to Microsoft Dynamics CRM? |  |

Competitors

| Question | Answer |
| --- | --- |
| Do you currently track competitors? If not, do you want to? |  |
| What information do you currently track? Are there characteristics you want to capture? |  |
| If you track them, where do you store this data? |  |
| Do you have sales literature (either your competitors’ or information you’ve created) that helps address customer concerns during the sales process? |  |
| Do you associate competitors with products of yours to understand how they compete? |  |
| Who maintains competitive information? |  |

Activities

| Question | Answer |
| --- | --- |
| Do you keep track of the activities, interactions or events that people participate in that generate new business or sales? |  |
| What types of activities or interactions do your sales, marketing and service users participate in to generate business? |  |
| Are your users standardized on Microsoft Office Outlook®? If so, to what extent is it used? |  |

Relationships

| Question | Answer |
| --- | --- |
| Do you need to maintain relationships between your accounts (companies)? |  |
| Do you need to maintain relationships between your contacts (individuals)? |  |
| Do you need to maintain relationships between your accounts and contacts (beyond a parent/child relationship)? |  |
| Do you need to maintain relationships between accounts and opportunities (beyond a parent/child relationship)? |  |
| Do you need to maintain relationships between contacts and opportunities (beyond a parent/child relationship)? |  |
| Do you have long-term relationships that change their association to Accounts or other Contacts? |  |

Opportunities

| Question | | Answer |
| --- | --- | --- |
| What is your definition of an opportunity? | |  |
| Do you have a method for tracking potential opportunities that you are working on with your customers (new or existing)? | |  |
| Do you have sales stages or a methodology that your sales team follows? | |  |
| Could you benefit from selecting values (for the potential sale) and probabilities for each opportunity? | |  |
| Do you schedule activities around these potential opportunities? | |  |
| Are there some specific characteristics that you may want to capture for opportunities? | |  |
| Can you forecast closure dates for your opportunities so that you can get an accurate picture of what type of business may be occurring in a specific time frame? | |  |
| Can you forecast revenue and probability of closure so that you can get an accurate forecast? | |  |
| Where are you tracking opportunities, if you currently capture them? |  | |
| Do you work with other partners or vendors when working on an opportunity? |  | |
| Will you be transferring this opportunity information to Microsoft Dynamics CRM? |  | |

Sales Literature

| Question | Answer |
| --- | --- |
| Do you have sales literature (for example, brochures, pictures, or any type of marketing materials) that you send out to customers? |  |
| Where do you store this literature? Is it electronic? Does a third-party vendor print it for you? |  |
| Can it be incorporated into Microsoft Dynamics CRM? |  |
| Do you want to develop literature that you can send out to prospects in either electronic or paper form? |  |
| Do you use Microsoft Office SharePoint® Server or another document/content-management system? |  |
| Should someone be in charge of this, or can anybody add new literature? |  |

Products

| Question | | Answer |
| --- | --- | --- |
| What products or services do you sell? | |  |
| Are your products grouped? | |  |
| What price lists do you maintain for pricing your products? | |  |
| For each price list, what are the products and prices within? | |  |
| For each product on the price list, is a volume discount associated? | |  |
| Do you have units of measure (units) defined? | |  |
| Do you track serial numbers for the products sold? | |  |
| What type of warranties do you provide for products? | |  |
| Do you track warranty start and end dates? | |  |
| Do you track owner asset tag numbers? | |  |
| Do you link service requests to products? | |  |
| Do you manage product kits? | |  |
| What system(s) are your products currently maintained in? |  | |
| Will you be transferring this product information to Microsoft Dynamics CRM? |  | |

Quotes

| Question | Answer |
| --- | --- |
| Do you use quotes currently? |  |
| Do you have a need for quotes? |  |
| Will salespeople be able to enter quotes in the Microsoft Dynamics CRM system? |  |
| Will you interface quotes to another system either electronically or manually? |  |
| Are there characteristics within a quote that you need to capture? |  |
| Is a quote template of use to you? Who will be responsible for templates? |  |

Orders

| Question | Answer |
| --- | --- |
| Do you use orders currently? |  |
| Do you have a need for orders? |  |
| Will salespeople be able to enter orders in the Microsoft Dynamics CRM system? |  |
| Will you interface orders to another system either electronically or manually? |  |
| Are there characteristics within an order that you need to capture? |  |
| What processes need to take place before an order is ready to be finalized and inventory can be selected? Are there controls on the Sales side? What controls are imposed by either the nature of the product or our organization? |  |
| Does your organization process order returns? |  |

Invoices

| Question | Answer | |
| --- | --- | --- |
| Do you use invoices currently? | |  |
| Will salespeople be able to enter invoices in the Microsoft Dynamics CRM system? | |  |
| Will you interface invoices to another system either electronically or manually? | |  |
| Are there characteristics within an invoice that you need to capture? | |  |
| Do you use a Microsoft Dynamics system with customizations to invoices today? If so, is it important for salespeople to see them in the Microsoft Dynamics CRM application? |  | |
| If you do not have a Microsoft Dynamics system, do you want to enter invoices in Microsoft Dynamics CRM? |  | |
| Do you invoice (or quote) in foreign currencies? If so how do you manage exchange rates? |  | |

Customer Service Organization (Contact Center) and Processes

| Question | Answer |
| --- | --- |
| Define the customer service organization, including purpose, functions, etc. |  |
| Define the customer service team. Who are the members and how is it structured (i.e. tiers, specialties)? |  |
| Describe how the customer service team supports your customers and the sales force (e.g. day in the life). |  |
| What are your service offerings? |  |
| How do you define a “service request”? |  |
| Do you have different originators for a service request? (e.g. customer, account manager, sales representative, third–party vendor, etc.) |  |
| Do customers have contracts or entitlements? |  |
| How are service requests originated? (e.g. Internet, telephone, e-mail, etc.?) |  |
| How are Service Representatives assigned to service requests? How are resources assigned or scheduled? |  |
| How are Service Representatives notified of new service requests? |  |
| What are the key elements of a service request? (e.g. status, area, description, etc?) |  |
| What happens to resolutions from prior service requests? Is a knowledge base in existence? |  |
| What steps are taken to close a service request? How is this recorded? |  |
| Can anyone outside Customer Service view activity between a customer and a Customer Service Representative (CSR)? |  |
| Do CSRs handle all service requests? Is there another department that can handle service requests? |  |
| What are your service request escalation procedures? |  |
| What information does a CSR need from a customer to solve the customer’s problem? |  |
| How does a CSR communicate with a customer? Does this depend on the initial contact from the customer? |  |
| Do CSRs create quotes, orders or invoices for customers? |  |
| How do orders get from the Customer Service department to the fulfillment part of the business? How do orders move through to Accounting for invoicing? |  |
| Can CSRs view all activity that has taken place between a customer and other departments, such as Sales or Marketing? |  |
| Who is entitled to support? How is this recorded? |  |
| Do you require service scheduling? |  |
| Are there different tiers of customer support personnel? |  |
| Are there any escalation procedures in place? |  |
| Do your CSRs rely on information stored in another system? |  |
| Do you bill customers by time spent or number of incidents reported? |  |
| Do you track the amount of time spent on a customer service case? |  |
| What metrics do you need to track about service calls? (e.g. time to resolution, average length of phone call, etc.) |  |
| **What types of reports are used in relation to Customer Service?** |  |
| Do CSRs follow scripts or guided dialogues based on certain responses? |  |
| What processes are in place to drive consistent service to customers across all business units? |  |
| How many applications does a CSR need to use to serve a customer (minimum, average, maximum)? |  |
| Is there Computer Telephony Integration CTI) in place to handle something like a screen pop-up? |  |
| Is there a report to show how much time an agent spends with a customer? |  |
| Is there a report to show the details for agent activity while interacting with customers? |  |
| What is the current Average Handling Time (AHT) and (First Contact Resolution (FCR)? |  |
| How often does an agent need to transfer calls to Tier 2 support or a specialist? What is the percentage of transfer rate? |  |
| How does a CSR handle the navigation of the application to serve customers? |  |

Contracts

| Question | Answer |
| --- | --- |
| Do you track service contracts or entitlements? Electronically? |  |
| Will you want to have contracts in Microsoft Dynamics CRM going forward? |  |
| What are your current contracts and respective data about that contract? |  |
| What types of contracts do you use when providing customer service (e.g. # of incidents, time worked) |  |
| Are products associated with contracts? |  |
| Are contacts associated with contracts? |  |
| What contract types do you track? |  |
| Do you have different levels of service contracts? |  |
| How do you manage your service calendars? |  |

Service Requests

| Question | Answer |
| --- | --- |
| Do you have a service organization that fields calls or e-mails relating to product questions, defects, and other customer service issues? |  |
| Do you have a call center that handles both customer service and sales calls? |  |
| Do you receive service requests by phone, Web request or e-mail? |  |
| In what ways do you assign and categorize your service calls? For example, do you categorize by subject, stage, priority, or service level? |  |
| How do you assign calls to Customer Service Representatives (CSRs)? |  |

Knowledge Base

| Question | Answer |
| --- | --- |
| Do you have a knowledge base? |  |
| How is your knowledge base organized? Do your answers have sections? If so, what are they? |  |
| Do you categorize your knowledge base? (Microsoft Dynamics CRM requires answers to be categorized into subjects.) |  |
| Is there a process in place to approve articles before they are published in the knowledge base? |  |
| Is your current knowledge base exposed externally to customers? If not, would you it like to be? |  |
| Are there different versions of knowledge base articles based on internal or external use? |  |
| Who can write knowledge base articles? |  |
| Who can approve knowledge base articles? |  |
| Do you have a record of frequently asked questions? Do you make this information available to customers? |  |

Service Scheduling

| Question | Answer |
| --- | --- |
| Do you require service scheduling in Microsoft Dynamics CRM? |  |
| Do you maintain facilities and equipment that may be allocated to a service schedule? |  |
| Do you service your customers from multiple sites? |  |
| Do you maintain records of resources and their associated skill sets? |  |
| Who schedules service activities? |  |
| How are resources scheduled and dispatched for work (by ZIP code, by customer, etc.)? |  |
| Are resources assigned directly to certain customers or can any resource service any customer or group of customers? |  |
| What shared resources are used in performing the services of your company? Does the equipment limit your ability to schedule service? |  |
| What types of services do you offer your customers? |  |
| Is travel time included in any scheduled activity? |  |
| What is the work capacity per user? How many things can they be scheduled for at one time? |  |
| Do you have rotating or non-standard work schedules? |  |
| Do you schedule services on holidays or weekends? |  |
| How are resources managed once they are dispatched in the field (e.g. check-In phone calls)? |  |
| Outside of personnel, are there other resources that you would like to be able to manage/schedule for your service offerings? |  |
| How do you currently manage calendars for personnel and other resources? |  |
| Does the team work in shifts? |  |
| Can services be scheduled on holidays, weekends, evenings, or other days when the business is closed? |  |
| Are there any procedures or documentation that the customer must complete to close out a service request? |  |
| Are there any procedures a Customer Service Representative must complete before they start work? |  |

Analytics

| Question | Answer |
| --- | --- |
| Do you have tools and data to identify trends and/or performance for different campaigns, services, opportunities, products, etc.? How do you implement them? |  |
| Do you have a 360-degree “Customer View” in order to understand customer behavior, frequent contact channels and product consumption? |  |
| How do you analyze customer demographics and operational data in order to generate “Customer Insight”? |  |

Home Page Announcements

| Question | Answer |
| --- | --- |
| Do you need to broadcast messages to Customer Relationship Management (CRM) users? |  |
| Who should maintain messages? |  |

Reports

| Question | Answer |
| --- | --- |
| What types of information are important to capture in reports? |  |
| Do you need sample reports, either for service or sales? |  |
| What type of metrics do you intend to capture for internal reporting? |  |
| Will you be doing any external reporting? |  |
| What are your current reporting standards (e.g., Microsoft Office Excel®, Microsoft Office Word, Microsoft SQL Server® Reporting Services, etc.)? |  |
| What is your Online Analytical Processing (OLAP) standard (i.e. Cognos, Ephiphany, Microsoft SQL Server Analysis Services, etc.)? |  |
| Do your users have the ability to create their own user-defined reports? How do you manage this functionality? |  |
| Are there frequently-updated graphs or charts that should be viewed by CRM users? |  |

Organization

| Question | Answer |
| --- | --- |
| Is there an organization chart available? |  |
| Have you thought about visibility rules? For example, should a CSR see all service requests within the company, within his/her department, or only his/her own? |  |
| Who are the employees/users within your company? How many will be set up on the system? |  |
| Do your employees/users currently use Microsoft Office Outlook to manage their daily workload and contacts? |  |
| Do you use different currencies for different organization-related transactions (e.g. opportunities, quotes, orders or invoices)? |  |
| Do you have groups of users with different and/or specific language settings (i.e. international audiences)? |  |

**Add any business-process or architectural diagrams, special requirements or other useful information here.**

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**Project Team Knowledge Assessment**

List the project team members who will participate in the engagement and their relative level of experience with the following products and technologies. Please label the knowledge level as None, Beginner, Intermediate, or Expert.

| Name | Role | Microsoft Dynamics CRM Experience | Sales | Marketing | Service | IT Infrastructure |
| --- | --- | --- | --- | --- | --- | --- |
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