

WELCOME DISCOVERY CONTENT

This document will be useful in preparing for our first pre-sales conversation. In order to properly scope a potential engagement, our team needs to understand as much about your business processes and systems as possible. The data you wish to track or upon which you would like to report, and the business processes the system should support for its users, are the keys to understanding what configurations or customizations will be required to meet your project objectives.

Of course, additional context is also very important, which is why we don't provide Statements of Work based on answers to a questionnaire. However, these are the types of questions will help you begin thinking about the type of information we need to help you be successful with Salesforce.



HIGH-LEVEL QUESTIONS

- What are the biggest challenges you are looking to overcome with this project?
- What are the benefits you hope to realize?
- Why is this important now?



USERS

- Who will use the system?
- In what roles do these users serve the organization?
- How big is each group of users?
- Are there things some users should be able to access that others should not?
- What are the benefits you are hoping to achieve for each group of users?



TECH LANDSCAPE

- What other solutions are deployed across the organization?
- Which tools might Salesforce replace in this phase of the engagement?
- Which tools might Salesforce replace in the future?
- Which tools might be beneficial to integrate now or in the future?
- Who uses these tools and for what purposes? How do they fit into the workflows of future Salesforce users?



BUSINESS PROCESS

- Which business processes should Salesforce support? Sales? Multiple Sales teams? Marketing? Customer Service/Support? Etc.
- What should a typical day look like for the different groups of users? What activities should they be undertaking to ensure their success? What systems do they currently use to support these activities? Which of the systems would be replaced by Salesforce? Which of these activities would continue in the current systems?

Example follow-up questions for sales users:

- How are new business opportunities identified?
- How do you market yourself to different groups, such as rep agencies, distributors, retailers, end-users, etc. (if marketing is part of the equation)
- What does a typical sales cycle look like for a new customer? Is it different for some of the groups noted above?
- What information do you need to capture during the sales process?
- What sort of functionality could help different types of users be more effective in their roles?





KPI'S AND REPORTING

- What are the most important drivers of success for the business as a whole? For individual users?
- Where is the greatest opportunity to grow the business, and how do plan to attack it? What will ensure success?
- From an executive standpoint, what reports do you want to see?
- What reports would be beneficial for sales people to have presented to them?



DATA MIGRATION

- What types of data will we need to bring into the system as part of this project?
- Where does the data reside today?
- Are there notes, attachments, or activity history records to migrate?



ENGAGEMENT-SPECIFIC QUESTIONS

- Do you have technically-inclined folks on the team that could handle some of the implementation work? Do they have bandwidth to take on some additional project work?
- With the understanding that “yesterday” isn’t feasible, what is your target “go-live” date for this project?
- Who will administer the system once the initial implementation is complete?
- Who will lead the communication with 17 Grapes during the implementation process?