

# PRE-DISCOVERY CHECKLIST

## PRODUCTIVITY TOOLS FOR ACUMATICA

We need to know a few things about your organization so we can better prepare a personalized proposal. One of our account managers will go through this questionnaire with you. Please have your answers ready so we can obtain an accurate snapshot of your needs.



### Company profile

- How long have you been in business?
- What is your main revenue source?
- How long have you been an Acumatica user?
- How many employees do you have?
- What is your annual revenue?
- Number of locations? Divisions or Business units?
- Primary frustrations with forms, workflows, admin?
- Which departments need to speed up operations the most?

### Agreement Designer What document types do you use and what is the frequency

- Proposals, bids, or sales contracts
- Contracts with subcontractors
- Statement of work with customers
- Arbitration agreements
- Standard delivery and return language
- Disclaimer language
- Non-compete or non-disclosure agreements
- Service agreements, warranties or guarantees
- Sale quotas and compensation plans
- Change Orders
- Project Definitions
- Onboarding and policy notifications



**Professional-looking agreements and documents help convey a positive impression about your organization.**



- Do you have a library of templates or boilerplates used as starting points for documents?
- Do you need to embed transactional data like account number, order number, pricing, or other data fields from your database to the document?
- Are errors commonplace when drafting the documents from templates?
- How long does it take from template initiation until final approval is completed?
- Does a manager or director review all agreements or documents created?
- Who decides when and how agreements are approved?
- Which documents, if any, get legal review? How long does that take?
- How often are sales quotas set and how many sales agents do you employ?
- What's your biggest frustration with binding agreements now? What do you hope to improve?



# PRE-DISCOVERY CHECKLIST

## PRODUCTIVITY TOOLS FOR ACUMATICA



**Questionnaire Designer** Which type of lists do you use and how often per week or month?

- Inspection checklists
- Construction punch lists
- Site surveys
- Sales discovery surveys
- Project management tasks
- Onboarding and training requirements
- Prospect nurturing steps
- Safety inspections
- Regulation compliance
- Asset maintenance steps
- Operational procedures
- Inbound receiving inspection of materials or goods
- Qualifications for hiring or advancement

- 
- Does the text of inspections/checklists change often or unique to a transaction?
  - Who is responsible for collecting and storing checklist data?
  - Which lists, if any, are routed to managers and stored for future use?
  - Do you need to report on the responses that are captured?
  - Do you need to capture responses remotely / in the field?
  - Do you need to provide a validation or inspection report to the customer?
  - How long are typical checklists and how long does it take to create them?
  - What is your biggest frustration in this area right now?
  - What do you hope to achieve with a tool for creating questionnaires/checklists?

**By telling us about your organization, we can better formulate a clear picture of use-cases, benefits, and value.**



### Ready for a formal discovery call?

Let your account manager know when you're ready to share your company information with us. We'll talk, discuss any unique issues you have and what you'd like to achieve.

### The next steps

Using your discovery profile, we'll prepare a proposal, highlighting some of the features we think you'll find most helpful. Then, it's time to sign off and we set a deployment time. We'll send education and training materials. You can expect to be up and running in 6-8 weeks.



For nearly 40 years we've been helping companies like yours optimize their their ERP solutions. Learn more at [Singlesrc.com](https://www.singlesrc.com)