



Westelcom* Company

CUSTOMER NEEDS ASSESSMENT

Call Guide

Date: _____

CUSTOMER INFORMATION

Name: _____
 Address: _____
 Phone: _____ Email: _____
 Webpage: _____
 CEO: _____
 CFO: _____
 Office Mgr: _____
 IT Director: _____

Phone System Vendor: _____
 IT Vendor: _____
 Security System Vendor: _____
 Important IT contacts: _____
 Additional Sites:
 1. _____ 2. _____
 3. _____ 4. _____

MEETING OBJECTIVES

1. _____
2. _____
3. _____
4. _____
5. _____

BUSINESS OVERVIEW QUESTIONS

What separates you from your competitors? What are your future plans? _____
 What modes of communication do you use most often? _____
 How efficient do you feel your communication platform is currently? _____
 What do you feel can be improved? _____
 When was the last time someone evaluated your existing communication platform services? _____
 What conclusions did they gather? Did you implement changes at that time? Why or Why not? _____

 Other than price savings, what factors go into a purchasing decision within your organization? _____
 Who would be involved in making purchasing decisions in regard to communication system? _____

SPECIFIC COMMUNICATION QUESTIONS

Who are you currently using? _____
 Voice Services? _____ Phone System? _____ Internet BW? _____ Other? _____
 What prompted you to select these/this carrier(s)? _____
 How do you handle your calls today? ie. receptionist, auto attendant, etc. _____
 Do you have more inbound or outbound calls? _____ A toll free number? _____
 Do you have remote employees? _____ Are they on the same phone system? _____
 What would you improve, if anything, about your current voice services? _____

Bandwidth

What type of data or internet connection are you currently using? Cable ___ DSL ___ T1 ___ Fiber ___ Wireless ___
 What are your current internet speeds and bandwidth? Upload: _____ Download: _____
 Is your current bandwidth/speed sufficient for your organizational needs? _____
 What prompted you to select these/this carrier(s)? _____

Backup/Disaster Recovery

How do your systems failover today if there is an outage? _____
 Do you have a current disaster recovery plan in place? _____ Do you have compliant requirements? _____
 How do you currently insure your information against loss? _____

Business Efficiencies

Does anyone access your network remotely? _____ Do you have multiple worksites? _____
 How do you address remote workers? _____

CLOSING

At Teo/Westelcom we pride ourselves in delivering a tailored solution to allow businesses to run more effectively, in order to increase your bottom line. If we can put that plan together with you to address those specific needs, would you feel comfortable in putting those actions in play with us?
 At this point, I'd like to take this information back and SCHEDULE a meeting with you on (date) _____ at (time) _____. We'd like to develop a solution to compliment/enhance your current communications systems. I appreciate your time.

NOTES

PRE-CALL ANALYSIS & EVALUATION

Did you review the company's website? _____ LinkedIn Pages? _____

Who's going to attend the meeting? _____

BUSINESS OVERVIEW NOTES

SPECIFIC COMMUNICATION NOTES

CLOSING NOTES Reminder! Please ask for current invoices.

CRITICAL NEEDS:

- 1.
- 2.
- 3.

SECONDARY NEEDS:

ACTIONS: ie. Fiber quote, proposal, technical service, additional follow-up, etc.

Next Meeting: _____

Circulation List: _____