CUSTOMER NEEDS ASSESSMENT

Call Guide

Westelcom® Company

Teo® A WESTELCOM COMPANY

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:	SECONDARY NEEDS:
1.	
2.	
3.	

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

Next Meeting:_____ Circulation List:_____