

Dear Prospective Client,

Before scheduling an DataNote ERP system presentation, it is essential to gather key information about our prospective client's business needs, current challenges, and expectations. This will help us to ensure that the presentation is tailored to their specific requirements and addresses their critical concerns.

The following questionnaire is designed to understand the prospective client's operations, goals, and readiness for ERP implementation, ultimately leading to a more focused and productive demonstration.

1. Company Overview

- Can you briefly describe your company and its core operations?
- What is the size of your organization (employees, locations)?
- What industry are you primarily operating in?

2. Current Systems

- Are you currently using any ERP system? If yes, which one?
- What other major software/tools are you using (accounting, CRM, HRMS, etc.)?

3. Challenges

- What key challenges are you facing with your current systems/processes?
- Are there any manual processes you are specifically looking to automate?

4. Goals and Expectations

- What are the top 3 objectives you hope to achieve with a new ERP system?
- Do you have any specific modules in mind (Finance, Inventory, HR, CRM, Manufacturing, etc.)?

5. Decision-making Process

- Who are the key stakeholders involved in the ERP decision-making?
- What is your expected timeline for ERP evaluation and implementation?

6. Budget

- Have you allocated a budget range for the ERP project?
- Are you looking for a cloud-based or on-premise solution?

7. Customization and Integration

- Will the ERP need to integrate with any existing systems?
- Are you expecting any specific customizations based on your business processes?

8. Implementation and Support

- What is your expected go-live timeline?
- Are you looking for ongoing support and training after implementation?

9. Data Migration

- Will you need assistance with migrating existing data to the new ERP system?
- What type of data will need to be migrated (customer data, financial records, inventory, etc.)?

10. Compliance and Security

- Are there any industry-specific compliance requirements the ERP should meet (e.g., GST, VAT, SOX)?
- Do you have specific security standards or certifications that the system must adhere to?

The information you provide will help us shape the ERP presentation to align closely with your business objectives and operational needs. Our goal is to offer a solution that not only addresses your current challenges but also supports your future growth.

Once we receive your responses, we will promptly schedule the presentation, ensuring that your key priorities are at the forefront.

Thank you & best regards,

Safal Infosoft Limited