

# What is important to know before the meeting?

When preparing for a meeting on the implementation of an SFA / FFM / RSE system, try to give yourself honest answers to as many of the following questions as possible:

**1** What are your goals (e.g., faster work, better control, reliable data, new customers, higher ROI, cost reduction, greater motivation, more accurate rewarding)?

**2** Who are your customers, how can they be segmented, what is the geographical reach and market segment. How many customers do you have?

**3** How many field employees do you have, what roles do they play, and which office employees do they cooperate with?

**4** What tasks are your people currently performing in the field, for which they are accountable?

**5** Does your company have loyalty/partnership programs?

**6** What back-office processes are linked to field processes (e.g., leave applications, approval of trade agreements, etc.)?

**7** What processes would you like to implement in your organization in the future?

**8** What IT systems do you have in the company and which of them should exchange data with SFA so that field teams can work more efficiently?

**9** Do you cooperate or plan to cooperate with distributors and need to integrate with their systems?

**10** When do you want to start and finish implementing the new SFA system?

**11** Do you already have an SFA system? If so, what is it and what are you missing in it?

**13** Do you have a reporting system or Business Intelligence?

**12** How do you utilize the acquired information and data? What market information are you missing?

**14**

**IMPORTANT:** Who else in your organization could benefit from the solution or should be involved in the decision-making process (e.g., sales director, regional sales manager, CEO, marketing director, IT director, business development manager)?

Everything ready?

**CONTACT US**