

Prospect Qualification Card

Customer Name
Target ERP

Current Site URL
CAM

Company & Business model

Business type:

Manufacturer
Distributor
Retailor
Service provider

Business model:

B2B via Resellers/Distributors
B2B Direct to End-Customer
B2C Direct to End-Customer
Other

Company Structure:

Single Company
Multiple Sales Companies

Brands/Markets:

Multi-Brand
Multi-Market

Sales Force:

Field Salesmen
Cust. Service / Order desk

eCommerce plans:

Site Structure:

Integrated Corporate Site
Single B2B Site
Multiple Sites (URL:s)

Localization:

Multiple Languages
Multiple Currencies

Primary users of Site(s):

Business End-Customer
Resellers/Distributors
Consumers
Field Salesmen
Customer Service
Order Desk

Main Objectives with the planned Site(s):

Business Requirements to be supported:

Advanced Product Search & Selection
Order Entry & Status Lookup
Store Locator
Campaigns management
Product Reviews
Advanced Spare Parts Managment
User Restricted or Hazardous Products

B2B Specific Requirements:

Self-Service Portal 24/7 (order tracking etc)
Quote Management (create & convert)
Adv. Order Management (copy & import)
Unique Customer Prices
Unique Customer Assortment
Role based access restrictions to content
Returns & Claims for B2B

Product Range:

Ready-Made (Stocked)
Assembly from Stock
Made-to-Order
Services
Other

Product Relations:

Accessories
Kits (defined in ERP)
Dimensions (color/size)
Spare Parts
Configurable products

Rich Product Data

Images
Extra Descriptions
Product Attributes
Documents
Videos

Additional comments regarding specific product or business requirements: