

# Brown Smith Wallace Consulting Group Free Consultation Offer

This worksheet will allow Brown Smith Wallace Consulting Group to help you get started quickly. It is also a valuable document to have before contacting any software vendor. We can use the data to qualify you as a prospect for each vendor. It is in everyone's best interest not to waste time if there is no fit. This form may be found and completed online at or can be faxed to (314) 983-1329. Our team will then set-up your complimentary 30-minute teleconference appointment.

Name \_\_\_\_\_ Title \_\_\_\_\_  
Address \_\_\_\_\_ City, State, Zip \_\_\_\_\_  
Phone \_\_\_\_\_ email \_\_\_\_\_

## Company Background

Company Name \_\_\_\_\_ Year Founded \_\_\_\_\_ Annual Sales (\$) \_\_\_\_\_  
Number of Branches \_\_\_\_\_ Do you have an eCommerce initiative? \_\_\_\_\_  
Number of Full-time Information Professionals \_\_\_\_\_ Number of Employees With System Access \_\_\_\_\_

## Project Timeline

When would you like to start? \_\_\_\_\_ When would you like to go live? \_\_\_\_\_

## Current System Information

Software System \_\_\_\_\_ Last Updated \_\_\_\_\_ Hardware Platform \_\_\_\_\_ Last updated \_\_\_\_\_

What do you like most about your current system? \_\_\_\_\_

What do you like least about your current system? \_\_\_\_\_

## System Selection

What are your goals for new software? \_\_\_\_\_

Describe the capabilities your company wants in a new system: \_\_\_\_\_

Other: \_\_\_\_\_

## System Sizing Information—Order Processing

Number of Sales Branches \_\_\_\_\_ Number of Ship-to Addresses \_\_\_\_\_ Number of Invoices Processed Weekly \_\_\_\_\_

Average Number of Line Items Per Order \_\_\_\_\_ Average Number of Line Items Per Back Order \_\_\_\_\_

## System Sizing Information—Inventory Control

Number of Warehouses \_\_\_\_\_ Number of Inventory Items (SKUs) \_\_\_\_\_ Average Number of Items Per Branch Warehouse \_\_\_\_\_

## System Sizing Information—Purchasing

Number of Vendors \_\_\_\_\_ Number of Purchase Orders Monthly \_\_\_\_\_ Number of Line Items Per Purchase Order \_\_\_\_\_

## System Sizing Information—General Ledger

Number of Companies \_\_\_\_\_ Number of Divisions \_\_\_\_\_ Number of Departments \_\_\_\_\_ Number of Accounts \_\_\_\_\_