

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 _____