

Diligence™ Workflow Survey

Contacts

Diligence™ performs

Can you quickly and easily track and measure all your contacts, orders, quotes, and vendors in a single file?

Can you easily capture and search all your contacts information now?

Is it all stored in a single program?

Is every contact assigned a distinct, separate identity number?

Is all your correspond with your contacts captured?

Can you create and save contact correspondence within your system, including eMail, Mail, Fax?

Can you / do you automatically date and save all this correspondence for future reference now?

Is all of your correspondence saved where you can immediately get at it?

Are you able to search all prior correspondence digitally?

Can you / do you mark individual contacts or groups of contacts with future action dates and future actions?

Can you get an instant profile of all orders and quotes for any contact? Are the results searchable?

Can you easily assign a Sales Rep to an individual contact?

X

Will this sales Rep information automatically transfer to quotes and orders for this contact?

X

Can you currently sort your contacts by prospect, customer, etc?

X

Can you easily assign multiple categories to search your contacts?

X

Can you easily fill in multiple choices within these search categories?

X

Can you easily send eMail directly from your Contacts?

X

Is that eMail touch saved and dated in your Contacts system?

X

Can you sort contacts into subgroups and easily send the whole group eMail?

X

Can you easily do this as individual eMails or as a single eMail using BCC?

X

Can you set customizable parameters describing each contact? Are these searchable later?

X

Do you have a way to set up a 'touch campaign' for your contacts? (trackable, searchable marketing touches)

X

Can you tie every order and quote and Contact together?

X

Do you have a way to create a quote directly from a contact record?

X

Do you have a way to create orders directly from a contact record?

X

For any contact, can you get an instant profile for their total quotes and orders?

Can you easily see summaries of all your contacts by type of contact or any other searchable parameters?

For your contacts, does your current Contacts manager easily make individual mailing labels?

Does your current Contacts manager easily make shipping labels?

Does your current Contacts manager easily make multiple Avery style mailing labels?

Quotes

Can you quickly create, track and measure quotes now?

Do all quotes receive a traceable ID number?

Can you store past quotes?

Can you search all your current and past quotes?

Can you easily identify active quotes VS sold quotes VS dormant quotes?

Can you search your quotes by contact?

Can you search your quotes by what's quoted?

- | | |
|--|-------------------------------------|
| Can you search your quotes by where the lead originally came from? | <input checked="" type="checkbox"/> |
| Can you search your quotes by sales Rep? | <input checked="" type="checkbox"/> |
| When you make new quotes can you pre-load the most common quote items and prices for use in the new quote? | <input checked="" type="checkbox"/> |
| Can you automatically generate new orders from quotes? | <input checked="" type="checkbox"/> |
| From any quote, can you automatically jump to that contact record? | <input checked="" type="checkbox"/> |
| From any quote, can you automatically jump to an order that originated from that quote? | <input checked="" type="checkbox"/> |

Orders

- | | |
|---|-------------------------------------|
| Can you easily create, track, and measure your orders? | <input checked="" type="checkbox"/> |
| Do all orders receive a traceable ID number? | <input checked="" type="checkbox"/> |
| Can you jump to the contact information that generated every order? | <input checked="" type="checkbox"/> |
| Can you jump to the quote information that generated every order? | <input checked="" type="checkbox"/> |
| Can you identify and search your orders by the source of the original lead? | <input checked="" type="checkbox"/> |

Can you identify and search your orders by the sales Rep? **X**

Are your invoices easily tracked to orders and quotes? **X**

Does your order management system automatically generate Invoice reports for your accounting system? **X**

Can you send invoices via eMail? **X**

Are all your invoices linked to contact information and quote information? **X**

Can you easily create and send Order Confirmations? **X**

Can you easily create and send Shipping/Delivery Confirmations? **X**

Can you easily track orders backlog (orders in house, not shipped/delivered)? **X**

Can you easily create and send order information to your accounting software? **X**

Vendors

Do you current system easily track vendors and purchasing info? **X**

Are vendors identified by trackable ID numbers? **X**

Can you easily save and search vendor part ID numbers and costs? **X**

Can you easily track what you last purchased from your vendors?



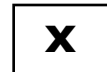
Can you easily track most current pricing from vendors?



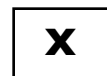
Are all vendor information fields searchable?



Can you easily enter/save specific vendor sales items and pricing?

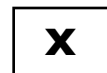


Can you create purchase orders for vendors?

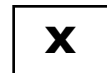


Dashboards

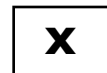
Can you instantly find all the orders you've received and sort them by due date?



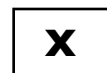
Can you instantly produce a summary of your current quotes by number and dollar volume?



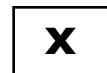
Can you search those current quotes immediately?



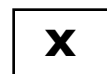
Can you instantly produce a summary of your backlog? (orders received, not completed)



Can you easily search those orders in backlog?



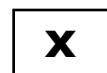
Can you instantly produce a summary of your receivables?



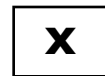
Can you easily search that list of receivables?



Can you instantly search the number of contacts you have?



Can you easily show a summary of all your current contacts?



Can you instantly search the number of prospects you currently have?



Can you quickly show a summary of all those current prospects?



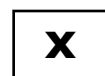
Can you instantly search the number of customers you currently have?



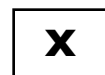
Can you easily show a summary of all your current customers?



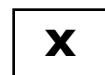
Can you instantly search the number of vendors you currently have?



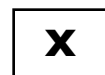
Can you easily show a summary of all your current vendors?



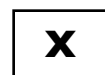
Can you easily save your current information about all these variables for review and comparison with future measurements?



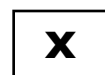
Can you instantly search your data to show how many orders you received or quotes you sent out within any date range and what the value of those orders are?



Can you easily display and search the total orders received you found within any date range by number and dollar volume?



Can you easily display and search all orders found within any date range search?



Are you able to collect your work history easily so you can see on one sheet the full yearly history of your business? Does this measure your contacts, orders, quotes, backlog? Can you search all these with 1 click?



**Diligence™ does all this
and much more.**

**All in the form of a simple,
easy-to-use calculator.**

Don't settle for an organizing system
that only tries to collect your contacts.

You need MUCH better organization than
that to stay competitive and to grow your
enterprise.

Diligence™ is not software you buy.

Diligence™ is a service provided by
Business Diligence that includes ongoing
training, support, and lifetime free
upgrades.

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