

Does all your warehouses operate uniformly or does some warehouse have specialized process/procedures?

CRM

1. Do you currently use any CRM? If so, which one?
2. What are the main pain points with your current CRM or lead management process?
3. How do you acquire new leads and convert them into customers? What channels do you use to acquire and manage leads?
4. How is your sales/CRM team structured? Do you have salesperson in each warehouse? Or is it more centralized?
5. How do you contact your leads? Do you use emails? Phone calls? SMS?
6. Do you track your leads? If so, how do you do it?
7. Do you have some dedicated people or a sales team who tracks your leads?
8. What are the stages the leads go through before converting them into opportunities?
9. Are there any specific approvals to convert a lead into an opportunity?
10. Are there any specific attributes (Tags) you use to segment customers?
11. Do you need automated reminders or follow-ups for your team based on customer interactions?
12. Would you like to track lead sources?
13. Can one of your salespeople be part of multiple sales teams?
14. Will you be able to export leads from your current system and give it to us for migration.

Sales

1. Can you explain more about your sales process? New Customers, and Existing Customers.
2. Do you work with Quotations?
3. Does your Quotation workflow contemplate any approvals?
4. What types of customers do you handle (B2B, B2C, or both)?
5. Do you have unique customer reference in your current system?
6. Do you have special pricing for specific customers or customer segments?
7. Do you have segmented prices/discounts? price lists? Customer tiers?
8. Do you have scenario where you invoice and collect all amount before delivery? ordered quantities or delivered quantities? Pro-forma invoice?
9. Who pays for deliveries? What delivery methods do you use? Are delivery fees known and charged to customer? Do you charge customers for credit card processing fees or do you absorb it?

10. Do you have defined payment terms and pricelist for each of your customers, so we can migrate those into Odoo?
11. What payment methods do you accept? (Card/Check/Wire/ACH) , Payment provider?
12. When you are creating a quote for a customer, What information do you refer to create quote?
13. Do you require customers to put down before confirming an order? Or are they on payment terms.
14. Do you have payment terms? If so, what payment terms do you have?
15. How frequently does your sales price change? How are you managing those currently.
16. How do you follow up on overdue payments or late invoices?
17. How do you handle refunds or returns of sold goods?
18. Do you do dropship of items directly from other vendors?
19. Do you offer discounts? If so, how are they applied to sales transactions? do you offer promotions?
20. How is your sales team structured? Across different warehouse. Can you please walk us through a scenario on how you are currently handling deliveries from different warehouses.
21. Are sales teams organized by region, product, or another factor?
22. Do you have performance metrics or KPIs for your sales team? What are they?
23. How do you manage commissions or incentives for your sales team?