

NAME: _____

ROLE: _____

Custom Software Planning Survey

We are starting a custom software project that will improve our operations and make our company stronger. The beauty of custom software is that we can have it do whatever we want.

We'd love your input about what aspects of our company you think we can best improve with a custom tool that does whatever we want. Of course, we likely won't be able to implement ALL your great suggestions. But please know that we will consider each one and appreciate your creativity and attention to detail for this opportunity.

Please contribute your ideas below by completing the sentences. Thanks!

1. Because of inefficiencies in our current process/systems, I waste a lot of time every week doing

2. I could become more PROACTIVE in my role in the company if we had a software that

3. We sometimes make (or almost make) big mistakes because we don't have a good system to

4. I have a hard time tracking

5. It'd be amazing if we could easily

6. If we fixed some of these efficiencies, the more important work I'd spend time on would include

7. I wish I had a dashboard or report that would let me quickly see

8. It'd be amazing if our customers could easily

9. I really wish our data would

10. If I got a simple notification about

...it would save me a ton of time each week.

11. _____

is already working well and I would prefer that this software project not change it.

12. A new system should definitely “talk” and sync data with the following existing software:

13. What other ideas do you have for how we can use custom software to improve our company?

Thanks again for your input!