Sonoran Integrations
Your Technology Solutions Provider

Technology and Communications
Discovery Questionnaire

All organizations are unique, and an excellent solution for one may not be a good fit for another. In order to make the most informed and future-proof decisions in one area, it is vital to step back and look at the whole picture.

By taking a few minutes to provide the following information about your organization, current services, and goals, your experienced technology solutions consultant will be equipped to provide the most accurate insights and recommendations.

Invest some time in taking a proactive approach now, and your organization will reap the dividends of excellent solutions and improved outcomes for years to come.

Initiatives and Goals

How has your business changed in the last 6 months-year? _____

What changes would you like to see happen in the next year? _____

What are the biggest roadblocks you're facing to get there? _____

What has been your approach to solving IT problems/changes so far? _____

Who typically does the research for changes? _____ Who typically makes the final decision? _____

How satisfied are you with your current providers, vendors, and carriers? _____

Is your organization growing? _____ Reducing/streamlining? _____ What is the timeline for the change? _____

On a scale of 1-10, with 10 being the highest and most urgent priority, please circle the level of importance for the following goals:

Improving customer satisfaction:	1	2	3	4	5	6	7	8	9	10
Improving customer retention:	1	2	3	4	5	6	7	8	9	10
Improving employee satisfaction:	1	2	3	4	5	6	7	8	9	10
Improving employee retention:	1	2	3	4	5	6	7	8	9	10
Improving operational efficiency:	1	2	3	4	5	6	7	8	9	10
Improving security/compliance:	1	2	3	4	5	6	7	8	9	10
Reducing monthly expenses:	1	2	3	4	5	6	7	8	9	10
Reducing # of vendors:	1	2	3	4	5	6	7	8	9	10
Reducing # of applications/programs:	1	2	3	4	5	6	7	8	9	10
Updating technology:	1	2	3	4	5	6	7	8	9	10

Are there any established timelines for projects and changes? _____

Are there any established budgets for these changes? _____

Any additional goals, concerns, or areas for improvement: _____

_____

Current Services

Type	Currently Have a Provider?		Provider Name	Satisfied with Service?		Under Contract?		Until When?
	Y	N		Y	N	Y	N	
Phone Lines								
Phone System/Service								
Conferencing/Collaboration								
Internet								
Cellular								
TV								
Cloud Computing								
Physical Security Monitoring								
Cyber Security Monitoring								
Customer Record Management (CRM)								
Merchant/Credit Card Processing Service								
Tech Support								
Fax/eFax								
Call recording								
Contact Center								
Answering Service								
Hardware Supplier								
Software Supplier								
Circuit Monitoring								
Email Archiving								
Data storage								
Any additional								

Internet/Data

Current Internet speed: _____ Is this adequate thus far? _____

Quality/Reliability

Have you ever lost internet connectivity   Y ☐   N ☐   If Yes, does it happen often?_____

Is the Internet vital to the operation of your organization?_____

List the operations, processes, and/or applications you use the internet for:_____

_____

What does an outage cost you in terms of customer service, sales, or operational set-backs? _____

_____

What is your current plan for occasions when the internet goes down?_____

Do you have redundancy/backup data lines?_____

List any other current internet function or carrier issues:_____

_____

Security/Compliance

Current security/compliance measures: _____

_____

Compliance requirements: HIPAA ☐   PCI ☐   HITRUST ☐   CIPA ☐   FISMA ☐   FIPS ☐   CPNI ☐

Any other compliance requirements now, or soon to come: _____

What compliance regulations do you or could you in the future be audited for?_____

Do you deal with personally identifiable information from clients, customers, or vendors? _____

Do you offer Wi-Fi to clients/customers? _____ Is that Wi-Fi monitored and secured? _____

Are your personnel trained in compliance requirements and responsibilities? _____

Customer records system:_____

Are your client records maintained digitally? _____ Accessible via web?_____

Have you done a live security penetration test or risk screening? _____

Last risk assessment: _____

Do you have a breach mitigation plan?_____

_____

Voice/Phone System

Current phone line carrier:_____

      Under contract?_____ If so, until when?_____

      How many lines? _____ Any toll free numbers?_____

How much long distance do you utilize each month?_____

Are there certain long distance areas that you communicate with regularly? _____

What is the current phone system? _____

What do you like about it?_____

What do you NOT like about it? _____

How many users/staff:_____ How many total phones:_____

List phones for common areas (ex: break room, copy room): _____

_____

Do all users need the same features/capabilities?_____

List any current issues with phones:_____

_____

Check off all the functions and features on your wish list:

___ Auto attendant

___ Intercom/Paging

___ Desktop applications

___ Instant messaging

___ Voicemail sent to email

___ Voicemail transcribed

___ Text or SMS capabilities

___ MMS Capabilities

___CRM integration

___ Availability/Presence

___ Call recording

___ Call reporting

___ E-fax

___ Multiple Caller IDs needed

___ Ability to change desks ("Hot Desking")

___ External call forwarding, or after-hours answering

___ Heavy call volume "queuing" or call center functionality

Conferencing

___ More than 8 parties

___ Video conferencing

___ Web conferencing

Mobility

____ find me/follow me

____ apps for multiple devices

____ single identity across devices

Any other wish list features:_____

Most important function of communications to your business: _____

What do you like about the current system?_____

What do you wish you could change to make things easier:_____

_____

_____