



**Example Client Needs Analysis and Requirements Definition
(To be modified to fit specific needs)**

Date of Client Enquiry

Date of the Initial Meeting

Company Name:

Contact or Client name:

Function in company:

Job Title:

Address	
Work Phone Number	
Mobile Phone Number	
Fax Number	
Email address	
Company Web-site address	

Before the Meeting

<p>Please find out the following details</p> <p>Take a moment before the meeting to review their web-site and their on-line annual report</p> <p>If you cannot find out before then cover these questions during your meeting</p>	
What is the nature of their business?	
What is the structure of their company? Are they a subsidiary of a group company? Are they the group company? Are there divisions in the company? What are they?	
Where are they located? How are they geographical spread?	
Do they or their subsidiaries buy our services already?	
Who are their main customers for their services or products?	
Who do they mainly compete with?	
What are their company expansion plans? Look back at their track record for the past few years if you cannot find this out	
Which existing client do we have who would be a well known and similar company to this one to refer to in our discussion?	
Do a little internal research on this client	

During the meeting

How did you hear about us?

Source of Enquiry: (eg/ existing customer, marketing activity, referral, sales activity, previous customer, other)

What were your reasons for contacting us?

Reason for Enquiry: (eg/ Image, Takeover, Company Restructure, Merger, Business Change, Project, Cost Focus)

Which of our particular services are you interested in?

Product Interest: (What is the main reason for the client interest? What is main product requirement?)
(NB/ Need to probe for further potential product needs later!)

Clients Key Business Objectives:

So I can understand a little more about your business would you mind answering a few questions?

What's the high level strategy for your business?

What are your current key business drivers? Eg/ cost reduction, growth, new markets

*What factors may positively or negatively affect Your core objectives?
eg Can't find right people.. Can't expand fast enough for other reasons...(ask for reasons)*

What is you company's attitude to outsourcing services?

What elements of your business do you currently outsource?

What are your emerging markets or growing areas for you?

Where are you expanding?

In what areas are your competitors expanding?

During the Meeting

Current Requirement Identification

<p>What are doing currently in the area that we are reviewing? What are the current arrangements or What is the situation?</p>
<p>What have you tried before you began looking for an outside solution?</p>
<p>Limitations of Current Arrangements: <i>What has prompted you to look for new arrangements?</i> <i>What are you looking for that you haven't got now?</i> <i>Are you looking at an Outsourced solution?</i> <i>Who else apart from us are you looking at?</i></p>
<p>Timescales <i>When will you need the solution to be operational by?</i> <i>When will you need to have made your decision on which solution to go for?</i> <i>What steps are involved in the decision making process?</i></p>
<p>What operations will you need to be performed?</p>
<p>No. of Things that you will require:</p>
<p>Where will you need the operations to be carried out? How often? When will you need the operation to be performed? To what standard?</p>
<p>What other areas within the company may need these services?</p>
<p>What opportunity is there to expand our services within the same area?</p>
<p>Who are the people involved in the decision making team? Names and positions?</p>

Client and Service Development Review

Review Meeting 1	Date?	
Attendees	Client	Us
Review Meeting 2	Date?	
Attendees	Client	Us

How satisfied is our client with our service?

(Positive developments, Improvement areas, Enhancements, Package requirements)

Who specifically has asked them about their satisfaction? Or how do we know?

Are there areas where we have develop new solutions that would help?

What are the future plans of the client?

(Growth/Retraction, Geographic Expansion, New Markets/Products)

Any other Points we should note?

What are the 5 ideas that we can go back to the client with?

They must suggest how we might help further and continue our relationship.

1st idea

2nd idea

3rd idea

4th idea

5th idea