



***Customer's Goals  
and Expectations***

## Using the Customer's Goals and Expectations

<b>Completed by:</b>	Customer and FACTS Implementation Consultant
<b>Purpose:</b>	To help establish expectations for the project by understanding the Customer's goals, attitudes and priorities related to the project.
<b>How it is used:</b>	This form is completed in the Project Strategy meeting. It serves as a guide for a discussion on expectations, along with the Local FACTS Office Goals and Commitments.
<b>When it is used:</b>	Complete during the Project Strategy meeting.
<b>Who uses it:</b>	Local FACTS Office and Customer
<b>File under:</b>	Planning/Project Strategy
<b>Last revised:</b>	05/01
<b>File:</b>	Customer Goals Objectives.exe

This is a self-extracting zipped MS Word document and must be printed/viewed through MS Word. This file is located in the Software Solutions Nexus – Facts/Documentation and Education/PIA.

Note: The Software Solutions Nexus is a private extranet and is available for local Facts personnel only.

## Customer's Goals and Expectations Worksheet

Which applications are most important to you?

Time Frame	Importance	Priority	Application / Add-On / Third Party Module
			Inventory Control
			Sales Orders
			Purchase Orders
			Sales Analysis
			Accounts Receivable
			Accounts Payable
			General Ledger
			System Management
			Payroll
			Manufacturing Control
			Job Cost
			Faxlink
			TeleFacts
			Office Automation
			EDI
			Service & Repair
			Clippership
			Uniform
			Archive
			IC Verify
			On-Ramp
			Other:
			Other:
			Other:

Define Your Overall Goals/Objectives of the Implementation Project:

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What Is the General Attitude Towards the New System? (1=resistant 5=passive 10=supported/enthusiastic)

Users: \_\_\_\_\_ Management: \_\_\_\_\_ Customers: \_\_\_\_\_ Vendors: \_\_\_\_\_ Other: \_\_\_\_\_

What Are Your Philosophies and/or Attitudes Towards Education and Training?

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What Are Your General Opinions of Gordon Graham's Philosophies, Theories, and/or Concepts?

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What Is Executive Management's Commitment Level to the Project? (I.E.: Resources, Time, Budget, Etc.)

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Other General Considerations and/or Concerns:

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Who in your organization is responsible for signing Implementation Agreement/Approval forms?

1. 

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2. 

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3. 

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Who in your organization will fill out Implementation Checkpoint evaluations?

1. 

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2. 

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3. 

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Other Notes/Comments:

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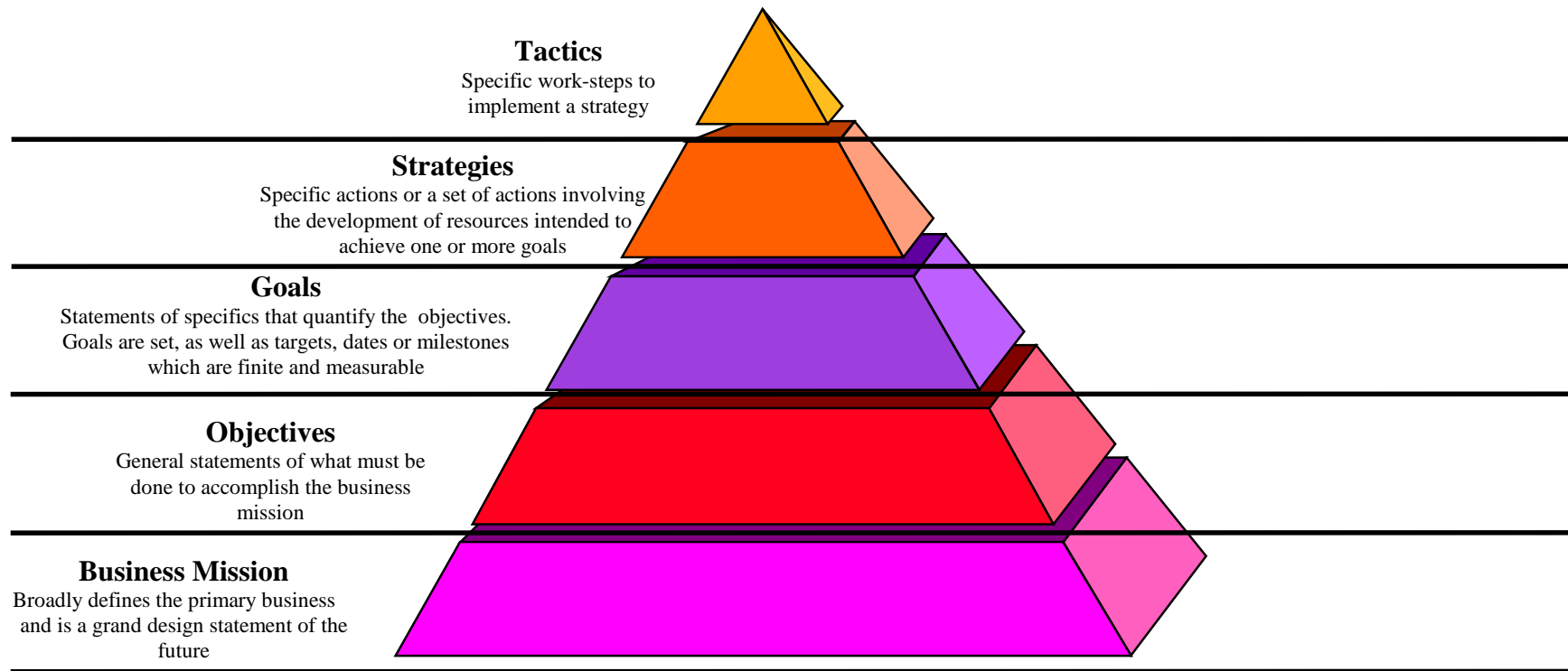
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## Customer's Goals and Expectations Worksheet

Using the table below, discuss your company's business mission, objectives, goals, strategies, etc, and how your new computer system will help to meet them. Write the main ideas to the right of the pyramid.

Your Company: \_\_\_\_\_



How will your new computer system help to meet these business objectives?

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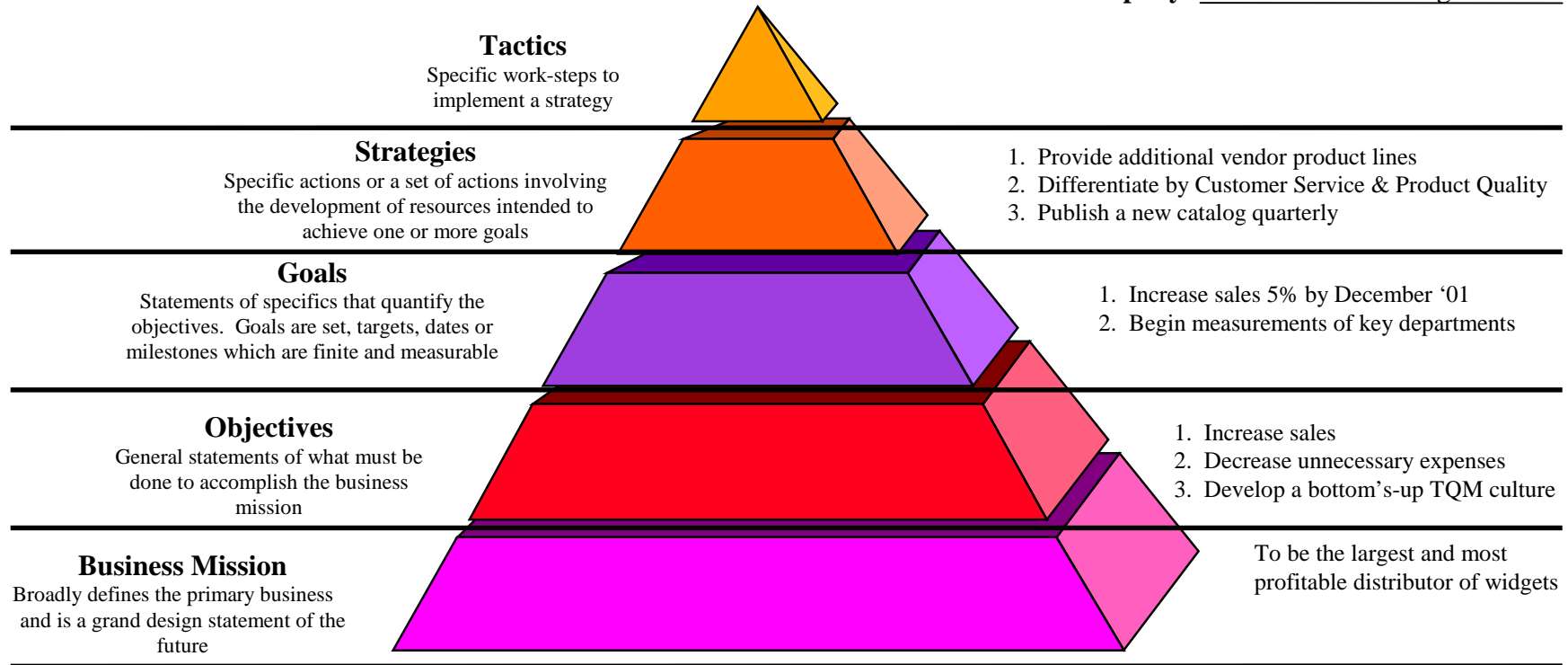
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## Customer's Goals and Expectations Worksheet

Using the table below, discuss your company's business mission, objectives, goals, strategies, etc, and how your new computer system will help to meet them.

Your Company: ACME Distributing



How will your new computer system help to meet these business objectives?

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