



## CLIENT DISCOVERY WORKSHEETS

### Pre-Demo Discovery Questionnaire

Contains basic information to be collected by the salesperson (Presagia or Presagia Partner) prior to the first client demonstration. Purpose is to gather sufficient information to insure that the demonstration is best tailored to the client's specific needs and pain points.

### Document Revision History

Date of Revision	Nature of Revision	Revision Author
April 24, 2013 – Version 1.0	Original	Nicola Boyd
April 24, 2013 – Version 1.0 API	Amended API Interface section	Nicola Boyd
April 29, 2013 – Version 1.1 API	Amendments and additions	Nicola Boyd

Client Name: \_\_\_\_\_

Client Website: \_\_\_\_\_

Principal Client Location (s) \_\_\_\_\_

Date completed: \_\_\_\_\_

Person completing form: \_\_\_\_\_

Sales person: \_\_\_\_\_

Names, Titles and Contact Information of Clients Participating on Call (Indicate Lead/Contact Person):

Lead/Contact Person: \_\_\_\_\_

Participants: \_\_\_\_\_

\_\_\_\_\_

Question	Purpose of Question	Prospect's Answer
<p>How do you manage leave today?</p> <p>What systems do you currently have in place? (e.g. paper, Excel, outsourced, Time &amp; Attendance plug in, nothing)</p>	<p>This is to start the conversation and learn at a high-level how they are managing leave today.</p>	
<p>What are your greatest pain points when it comes to leave management?</p>	<p>Points that we will need to discuss specifically during the demo and future discussions/proposals. In a recent survey, the top reasons identified as pain points were:</p> <ul style="list-style-type: none"> <li>• Training supervisors/managers on FMLA</li> <li>• Controlling employee abuse</li> <li>• Relying on managers for leave enforcement</li> <li>• Ensuring consistency of applying FMLA across the organization</li> <li>• Lack of or minimal number of internal resources/staff to manage FMLA</li> <li>• Granting too much time away from work (being lenient in management of program)</li> <li>• Granting too little time away from work (being aggressive in management of program)</li> <li>• Lack of educated/trained internal resources/staff to manage FMLA</li> <li>• Keeping up with new federal, state and/or municipal/county laws</li> <li>• Maintaining adequate records</li> </ul>	
<p>How does your organization stay up to date with changes to leave regulations?</p>	<p>Identifies whether compliance is an issue for the employer and how our compliance messaging can address their need.</p>	
<p>How many employees do you have?</p> <p>How many leave cases do you manage annually?</p>	<p>Determines price. We price by employees and not by case volumes or activity. However the number of cases is indicative of the leave team workload.</p>	

	SimplyLeave can only be offered to prospects with <2,500 employees. You also cannot use SimplyLeave if you'd like the Accommodation module, employee/manager self-service or would like to customize the system.	
Do you have employees in multiple states? Which/How many?	The more states that they need to manage, the bigger their need. There are certain key states (CA, NY, NJ, WA, OR, WI) that have the highest complexity and compliance issues based on our experiences. Oftentimes it can be useful to ask which states they find the most difficult.	
Do you have any company or union policies that affect leave?	Helps us to understand if they will need company policies to be set up alongside the statutory leave regulations? <b>If they are complicated, Presagia Enterprise may be required.</b>	
What does your leave management team look like? How many people are there?	It is important to know how many full time users they will have in order to understand how automation of workflow can help.	
Are your leave management and human resources teams centralized or distributed?	Helps to understand the leave workflow and peoples' responsibilities.	

<p>Do you manage short term/long term disability and workers compensation internally?</p> <p>If not, who are your external vendors?</p> <p>If yes, how do you ensure that the teams communicate with each other?</p>	<p>This is to have a better understanding of how many departments will be involved in the system purchase. Also to know which leaves will be managed in the system. Some companies only want to use the system for some of their leaves types (for example, FMLA is handled by the leave team, but STD/LTD/WC are managed by the benefits team).</p> <p>Presagia only manages the leave aspects of disability claims - we don't manage the financial aspects (we don't do claims management or OSHA reporting).</p>	
<p>Would you be interested in offering self-service to your employees, for example where they can request leave on-line?</p>	<p>Qualifies the need for employee self-service. Determines how tech savvy their workforce is and if employees have access to computers and email at work. <b>If Yes, Presagia Enterprise is required.</b></p>	
<p>Would you be interested in offering manager self-service?</p> <p>For example, allow managers to submit leave requests on behalf of their employees, manage some steps in the leave process, or run basic reports.</p>	<p>Qualifies the need for manager self-service.</p> <p>Identifies potential for distributed teams and redistribution of workload. <b>If Yes, Presagia Enterprise is required.</b></p>	
<p>In your leave processes, do you:</p> <ul style="list-style-type: none"> <li>- Require medical certifications to approve leave?</li> <li>- Ask for advance notice of leave?</li> <li>- Require a medical release or fitness for duty form prior to return to work?</li> </ul>	<p>Makes employers aware that there might be areas where they can exert their rights to improve delivery of their programs.</p>	

Accommodation		
Do you have a process for managing accommodations for ADA requests, Stay at Work and Return to Work?	To determine if they may be interested in the Accommodation Module. <b>If Yes, Presagia Enterprise is required.</b>	
Who manages accommodation?  If not the leave team – how do the leave and accommodation teams communicate?	We want to know if the leave team will be managing accommodations.	
How many accommodation cases do you have in a year?	Speaks to need and urgency.	
What issues are you facing today with the way you manage accommodation?	<p>Need to understand their pain points, so they can be focused on during subsequent demos and communications.</p> <p>Some issues that cause clients pain are:</p> <ul style="list-style-type: none"> <li>- Lack of compliance related to ADA</li> <li>- Delayed return to work</li> <li>- Increase in Lost Days</li> <li>- Lack of unified approach</li> <li>- Difficulties in documenting the interactive approach.</li> </ul>	
Project Stakeholders and Competition		
<p>Who is part of the team that will be reviewing the project?</p> <p>Who are the decision makers?</p> <p>Is the project budgeted?</p> <p>What is your project timeline? (E.g. when do you want to implement?)</p>	To understand the opportunity and timing.	

<p>Have you seen any other leave or accommodation management systems?</p> <p>If so, what did you like or dislike about them?</p> <p>Are there any other vendors still under review, and if so who?</p>	<p>To understand the competitive landscape.</p>	
<p><b>Systems (For API Only)</b></p>		
<p>What version/s of T&amp;A have you used in the last 12 months and is an upgrade already scheduled?</p>	<p>Clients must be on Time and Attendance v.09.00.05 or 09.01.03 to integrate.</p>	
<p>What version/s of Payroll/HRIS have you used in the last 12 months and is an upgrade already scheduled?</p>		
<p>What other new API products, besides Leave Management, is the customer considering?</p>		