



FACT-FINDING QUESTIONNAIRE

From the moment you first contact Solutio, you will be guided through a Fact-finding process to help you establish the real benefits of choosing our software platform.

You will be given access to our updated Sales Brochure before being invited to join an initial Discovery Call where both parties get to know each other and define your business objectives.

This will then be followed by an interactive Online Demo where you will be able to view the functionality of Solutio in real time and ask questions pertinent to your requirements.

We are confident that you will request an initial meeting following the Demo which will precede a detailed Scoping Session where your team can interact with the platform. Finally, we will submit a commercial proposal drafted specifically for your business and arrange a deployment schedule.

CUSTOMER INFORMATION

Customer Name

Position

Contact Number

Contact Email

Web Address

Company Name

Address

City

Postcode

Company No.



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Is your company part of the group structure?

- Yes No
-

Do other members of the group structure require Solutio too?

- Yes No
-

How did you hear about Solutio?

- | | |
|---|---|
| <input type="radio"/> Cold Call/Email | <input type="radio"/> Internet Search |
| <input type="radio"/> Social Media | <input type="radio"/> Trade Organization |
| <input type="checkbox"/> LinkedIn | <input type="checkbox"/> APSCo - The Association of Professional Staffing Companies |
| <input type="checkbox"/> Facebook | <input type="checkbox"/> FCSA - The Freelancer & Contractor Services Association |
| <input type="checkbox"/> Other (Please specify) | <input type="checkbox"/> Lawspeed |
| <input type="text"/> | <input type="checkbox"/> Professional Passport |
| <input type="radio"/> Magazine Advertisement or Article | <input type="checkbox"/> REC - Recruitment & Employment Confederation |
| <input type="checkbox"/> Global Recruiter | <input type="checkbox"/> SIA - Staffing Industry Analysts |
| <input type="checkbox"/> Recruiter | <input type="checkbox"/> TEAM - The Employment Agents Movement |
| <input type="checkbox"/> Other (Please specify) | <input type="checkbox"/> Other (Please specify) <input type="text"/> |
| <input type="text"/> | |
| <input type="radio"/> Referral | <input type="radio"/> Industry Event |
| <input type="checkbox"/> Existing Client | <input type="checkbox"/> Exhibition |
| <input type="checkbox"/> Industry Contact | <input type="checkbox"/> Social |
| <input type="checkbox"/> General Recommendation | <input type="checkbox"/> Workshop |
| <input type="checkbox"/> Other (Please specify) | <input type="radio"/> Other (Please specify) <input type="text"/> |
| <input type="text"/> | |

COMPANY INFORMATION

Business Type

- Umbrella Recruitment Agency
- Hirer Supplier/Partner
- Other (Please specify) PEO or RPO

How many people do you employ in total?

How many people in your registration team?

How many people in your operations/compliance team

How many people are in your payroll team?

How many people are in your accounts/finance team?

Contractor numbers per week

Contractor numbers per month

Contractor numbers per year

Payroll Models Supported

- Standard Umbrella (PAYE) PAYE
- PSC Joint Employment
- Salary Sacrifice CIS
- Other (Please specify) Deemed Employment

Sectors

- | | | |
|--|--|---|
| <input type="checkbox"/> Public Sector | <input type="checkbox"/> Private Sector | <input type="checkbox"/> Banking/Finance |
| <input type="checkbox"/> Construction/Engineering/Rail | <input type="checkbox"/> Driving/Logistics | <input type="checkbox"/> Education/Training |
| <input type="checkbox"/> Healthcare/Social Care | <input type="checkbox"/> IT | <input type="checkbox"/> Manufacturing/Industrial |
| <input type="checkbox"/> Media/Creative | <input type="checkbox"/> Oil & Gas | <input type="checkbox"/> Retail |
| <input type="checkbox"/> Other (Please specify) | | |
| <input type="text"/> | | |
-

Compliance Credentials

Does your company belong to any of the following organisations?

- APSCo - The Association of Professional Staffing Companies
- FCSA - The Freelancer & Contractor Services Association
- Lawspeed
- Professional Passport
- REC - Recruitment & Employment Confederation
- SIA - Staffing Industry Analysts
- TEAM - The Employment Agents Movement
- Other (Please specify)

SOFTWARE INFRASTRUCTURE

CRM Systems Currently Used

- | | |
|---|---|
| <input type="checkbox"/> Zoho | <input type="checkbox"/> Microsoft Dynamics |
| <input type="checkbox"/> Itris | <input type="checkbox"/> Sugar |
| <input type="checkbox"/> Salesforce | <input type="checkbox"/> Goldmine |
| <input type="checkbox"/> Eclipse | <input type="checkbox"/> Redfish |
| <input type="checkbox"/> Other (Please specify) | |

Payroll Software Currently Used

- | | | |
|---|--|-------------------------------------|
| <input type="checkbox"/> In-house | <input type="checkbox"/> Tempaid | <input type="checkbox"/> Accentra |
| <input type="checkbox"/> AccessGroup | <input type="checkbox"/> 12 Pay | <input type="checkbox"/> Brightpay |
| <input type="checkbox"/> Digicom | <input type="checkbox"/> Brainpay | <input type="checkbox"/> FMP Global |
| <input type="checkbox"/> Forest | <input type="checkbox"/> eRecruit | <input type="checkbox"/> Merit |
| <input type="checkbox"/> Moorepay | <input type="checkbox"/> Kashflow | <input type="checkbox"/> Sage Pay |
| <input type="checkbox"/> Other (Please specify) | <input type="checkbox"/> My Digital Accounts | |

Accounting Software Currently Used

- | | |
|---|-------------------------------------|
| <input type="checkbox"/> In-house | <input type="checkbox"/> Bluqube |
| <input type="checkbox"/> Free Agent | <input type="checkbox"/> Quickbooks |
| <input type="checkbox"/> Xero | <input type="checkbox"/> Clearbooks |
| <input type="checkbox"/> Other (Please specify) | <input type="checkbox"/> Sage Pay |

How is Data Shared?

- | | |
|--|-------------------------------------|
| <input type="checkbox"/> Manually | <input type="checkbox"/> It isn't |
| <input type="checkbox"/> Automatically | <input type="checkbox"/> Don't know |

WORKER ENGAGEMENT

How do you communicate with your workers?

- | | |
|--|---|
| <input type="checkbox"/> Via Agency | <input type="checkbox"/> Direct by Phone |
| <input type="checkbox"/> Direct via an App | <input type="checkbox"/> Direct by WhatsApp |
| <input type="checkbox"/> Direct by Text or Messenger | <input type="checkbox"/> Via Hirer |
| <input type="checkbox"/> Via Umbrella Company | <input type="checkbox"/> Direct by Email |
| <input type="checkbox"/> Other (Please specify) | <input type="checkbox"/> In Person |

Is your timesheet and expenses processing automated?

- Yes No

Who approves timesheets and expenses?

- | | |
|---|-----------------------------------|
| <input type="checkbox"/> Agency | <input type="checkbox"/> Umbrella |
| <input type="checkbox"/> No Approval | <input type="checkbox"/> Hirer |
| <input type="checkbox"/> Other (please specify) | |

On which days do you run payroll?

- | | |
|------------------------------------|-----------------------------------|
| <input type="checkbox"/> Sunday | <input type="checkbox"/> Thursday |
| <input type="checkbox"/> Monday | <input type="checkbox"/> Friday |
| <input type="checkbox"/> Tuesday | <input type="checkbox"/> Saturday |
| <input type="checkbox"/> Wednesday | |

With whom do you bank?

Any other comments?