

SanPest Platform implementation assessment request

Questionnaire for preparing a tailored proposal to digitalise pest control operations
B2B discovery form | Consulting & Digital Solutions



S Consulting Group

This questionnaire helps us understand the scale of your operations, your current workflows, the modules you require and any integrations. Based on the information provided, we will prepare a proposed solution and an indicative quotation.

1. COMPANY DETAILS

Company name

Country

City

Website

Contact person

Job title

Email

Telephone / WhatsApp

Business activity

☐ Pest control services

☐ Facilities management

☐ Municipal services

☐ Hygiene and sanitation services

☐ Other:

2. SCALE OF OPERATIONS

Number of employees

Field workers / technicians

Administrative users

Sites / branches

Number of active clients

Work orders per month

Service model

☐ Recurring contracted services

☐ Emergency call-outs

☐ One-off treatments

☐ Combination of the above

3. CURRENT WAY OF WORKING

What do you currently use?

☐ Paper records

☐ Viber / WhatsApp communication

☐ CRM system

☐ FieldRoutes

☐ No dedicated software

☐ Excel spreadsheets

☐ Existing ERP system

☐ PestScan

☐ Other specialist software

☐ Other:

If you use an ERP, CRM or other application, please state the system name

Which areas currently cause the greatest difficulties?

☐ Job planning

☐ Completion monitoring

☐ Payment collection

☐ Stock / treatment products

☐ Reporting

☐ ERP integration

☐ Other:

☐ Field operations

☐ Billing

☐ Client documentation

☐ Workforce oversight

☐ Communication

☐ Duplicate data entry

Please briefly describe your current workflow

4. MODULES OF INTEREST

- | | |
|--|---|
| ☐ Client and contact database | ☐ Client branches and sites |
| ☐ Contracts and service plans | ☐ Automatic work-order generation |
| ☐ Calendar / scheduler | ☐ Employee overview |
| ☐ Mobile view for field workers | ☐ QR code scanning at sites |
| ☐ GPS arrival verification | ☐ Digital client / worker signature |
| ☐ Offline field operation | ☐ Service completion certificates |
| ☐ PDF reports for clients | ☐ Billing |
| ☐ Payment tracking | ☐ CRM / sales / leads |
| ☐ Stock / products / batches / expiry dates | ☐ Employee stock requests |
| ☐ Vehicles and servicing | ☐ Fuel records |
| ☐ Travel orders | ☐ Internal tasks and notifications |
| ☐ Dashboards and management reports | ☐ Client self-service portal |
| ☐ Email / Outlook integration | ☐ eProcurement / tenders |
| ☐ System backup and administration | ☐ Timesheets / working-time records |
| ☐ Suppliers and partner records | ☐ Supplier invoices / incoming documents |
| ☐ Mail register / document workflow | ☐ Notices / postponements / rescheduling |
| ☐ Work equipment / clothing / assignments | ☐ Checklists / errors / audit log |
| ☐ Other: <input type="text"/> | |

Additional notes on the modules that are important to you

5. FIELD OPERATIONS

Do field workers use mobile phones?

- ☐ Yes ☐ No ☐ We plan to introduce them

Which devices do they use?

- ☐ Android ☐ iPhone
☐ Both ☐ Not yet decided

Which capabilities do you require?

- | | |
|---|---|
| ☐ QR code at the site | ☐ GPS proof of arrival |
| ☐ Digital client signature | ☐ Digital worker signature |
| ☐ Before-and-after photographs | ☐ Products recorded by treatment |
| ☐ Offline work without internet access | ☐ Report by site |
| ☐ Report by client | ☐ Report by period |
| ☐ Report by pest | ☐ Report by treatment product |

Field workers should be able to view

- | | |
|---|---|
| ☐ Only their own work orders | ☐ Their team's work orders |
| ☐ All work orders, depending on role | ☐ Not yet decided |

Special rules for field operations

6. BILLING AND FINANCE

Should the system

- | | |
|--|--|
| ☐ Prepare draft invoices | ☐ Generate PDF invoices |
| ☐ Track payment status | ☐ Link completed work to invoices |
| ☐ Export data to another system | ☐ Handle operations only - billing remains in the ERP |

Name of ERP / accounting application

Special billing rules

Billing is performed

- | | |
|---|---|
| ☐ By contract | ☐ Per completed work order |
| ☐ Monthly | ☐ Quarterly |
| ☐ By site | ☐ By client |
| ☐ Using a combination of methods | |

7. INTEGRATIONS AND TECHNICAL REQUIREMENTS

Preferred hosting model

- | | | |
|--|--|--|
| ☐ Cloud hosting | ☐ Installation on your own server | ☐ Not yet decided |
|--|--|--|

Do you have an internal IT team?

- | | | |
|------------------------------|-----------------------------|---------------------------------|
| ☐ Yes | ☐ No | ☐ Partly |
|------------------------------|-----------------------------|---------------------------------|

Which capabilities do you require?

- | | |
|---|---|
| ☐ API integration | ☐ ERP integration |
| ☐ SSO / Microsoft account | ☐ SSO / Google account |
| ☐ Import of existing data | ☐ Audit log / change history |
| ☐ Multiple languages | ☐ Branded documents and reports |
| ☐ GDPR / security requirements | ☐ NDA before technical discussions |

Format of existing data

- | | |
|--|--|
| ☐ Excel | ☐ CSV |
| ☐ ERP export | ☐ Paper documentation |
| ☐ Other: <input type="text"/> | |

8. IMPLEMENTATION

When would you like to start?

Target implementation date or period

Which delivery model would suit you best?

- | | |
|--|--|
| ☐ Product demonstration | ☐ Pilot project for one department / team |
| ☐ Phased implementation by module | ☐ Full implementation |
| ☐ We are not yet sure | |

Number of pilot users

Number of pilot sites

Initial department / team

Which capabilities do you require?

- | | |
|--|--|
| ☐ User training | ☐ Data migration |
| ☐ Technical documentation for IT | ☐ Formal proposal |
| ☐ Maintenance and support agreement | ☐ SLA / defined support level |

9. PRIORITIES AND OBJECTIVES

What is the main reason you are considering a new system?

What would a successful outcome look like after implementation?

Which problems are the most urgent to resolve?

- | | |
|--|--|
| ☐ Less manual work | ☐ Better oversight of field operations |
| ☐ Faster billing | ☐ Better client documentation |
| ☐ Standards / inspections | ☐ Integration with the existing ERP |
| ☐ Better management reporting | ☐ Fewer errors and less duplicate entry |
| ☐ Scaling the business | ☐ Other: <input type="text"/> |

10. ADDITIONAL REQUIREMENTS AND NOTES

Additional notes, specific requirements, workflows, integrations or questions

Recommendation: describe any specific workflows, billing exceptions, internal procedures, special reports, management requirements, IT constraints or integrations not covered by the previous questions.

11. DECISION-MAKING, CONSENT AND SUBMISSION

Who is involved in the decision to introduce the system?

Is there an internal procurement or approval process?

Consent

- ☐ I agree that S Consulting may contact me regarding this enquiry.
- ☐ I confirm that the information entered is accurate to the best of my knowledge.

Submitting the questionnaire

Please email the completed PDF to: info@s-consulting.ba

Email subject: Completed SanPest Platform questionnaire - [Company name]

Send by email

Note: depending on your PDF reader, the email button may open your email application without attaching the document automatically. If this happens, save the completed PDF and attach it manually.