

The 117 questions we ask before building operations software

They come from documenting a real operation, department by department. Use them on your own business — with or without us. The live version stays at solvorn.in/questions.

01 Five that reveal hidden losses

- 1 When a vehicle comes back at the end of a term, who sets its resale price, and how does that compare to what the contract assumed it would be worth?
- 2 Which charges beyond the monthly amount are billable in theory, and roughly what proportion of them actually get billed?
- 3 Between the quote the customer agreed and the final supplier invoice, who checks the two still match — and what happens if they do not?
- 4 How long after a delivery does the first invoice go out, and who would notice if it never did?
- 5 How many vehicles are currently past their contract end date, still with the customer, and on what terms?

02 Sales and enquiry

- 6 An enquiry arrives on a Tuesday morning. Walk me through the next four hours — who touches it, in what order, and where does it get written down?
- 7 How does an enquiry reach you at all — reference, website, someone's personal contact, an existing customer's colleague? Which of those closes best?
- 8 When someone calls asking about leasing, how do you find out whether they are even allowed to lease a car under their employer's policy?
- 9 How do you work out what car to suggest? Is it what they ask for, or is there a car you steer people towards, and why?
- 10 Are there cars you quietly avoid quoting? What made you learn that?
- 11 Who decides which product variant the customer gets offered? What question do you ask that tells you which one it should be?
- 12 What is your promise on how fast a quote goes out — and does that promise change if the vehicle is in another state?
- 13 Follow-up (if a promise exists): when the quote is going to be late, what happens? Who tells the customer, and how?

- 14 When you speak to someone at a company, how do you know whether they can actually authorise a lease or are just interested?
- 15 What information do you collect from the customer before anyone starts pricing, and how does it get to the person who prices it?
- 16 Follow-up (if there is a form): who fills it — you or the customer? What happens when it comes back half empty?
- 17 Has a deal ever gone a long way and then died because of something that should have been caught on day one? What was it?

03 Pricing and quotation

- 18 Someone has to turn a customer requirement into a number. Who is that person, and what do they open to do it — a spreadsheet, a template, something someone built?
- 19 Where does the vehicle price in that calculation come from, and how old is it by the time it is used?
- 20 Which numbers in a quote are fixed by policy, and which ones can a person change on their own judgement?
- 21 Follow-up: is there a floor — a margin, a rate, a residual — below which someone has to ask permission? Who grants it, and how is that permission recorded?
- 22 Who approves a quote before it goes to the customer, and what are they actually checking?
- 23 How many quotes does one customer typically end up with before something is signed? What happens to the old ones?
- 24 When a customer negotiates, what are the levers your team pulls to bring the number down? List them in the order you would use them.
- 25 How does the salesperson know which version of the quote is the final one?
- 26 Has a superseded quote ever been treated as the live one further down the process? What did that cost?
- 27 When the customer says yes, how is that yes captured? Verbally, on WhatsApp, on email, on paper?

04 Procurement and supplier

- 28 Who talks to the vehicle suppliers, and how many do they approach for one requirement?
- 29 What exactly do you ask a supplier for — a formal quotation document, or a price over the phone?
- 30 Follow-up (if suppliers sometimes give informal pricing): how does that verbal discount become something you can rely on later? Who writes it down, and where?
- 31 Discounts get quoted on different bases. How does your team make sure everyone is comparing the same number?

- 32 How do you confirm a vehicle actually exists and is available, versus the supplier saying it is available?
- 33 What is the gap between a vehicle being reserved for you and it physically leaving the supplier? Who tracks that, and how often do they chase?
- 34 Which details on a supplier's document have caused you problems when they were wrong — and who catches them now?
- 35 When the vehicle takes months to arrive, what happens if the supplier revises the price in the meantime? Who finds out, and what has to be redone?
- 36 Do you pay the supplier anything at the point of ordering? Who authorises it, and how does that person learn the amount?
- 37 Follow-up: how do you prove later that you paid it?
- 38 When a supplier is in a different state or tax jurisdiction, what changes about how you deal with them?
- 39 Who is the single person who would know today where every ordered vehicle currently is?

05 Registration and delivery

- 40 Walk me from the vehicle being paid for to the customer having keys. Every hand it passes through.
- 41 What documents must be collected from the customer for registration, and at what point does someone discover one is missing?
- 42 Who physically deals with the registration authority — your staff, the supplier, an agent?
- 43 What part of registration depends on the customer being reachable at a specific moment? What happens when they are not?
- 44 Before a vehicle is handed over, who confirms it is the right vehicle in the right condition? What do they look at?
- 45 Is there any photographic record of a vehicle at handover? Who takes it and where does it live?
- 46 How does the delivery date that was promised to the customer get tracked against what actually happens?
- 47 Are there customers with extra paperwork at delivery? What triggers that, and who knows it applies?

06 Contracts and documentation

- 48 How many different agreement templates exist, and what decides which one a deal gets?
- 49 Who fills them in, and what do they copy the details from?
- 50 Follow-up: if the same customer detail appears in three documents, is it typed three times?

- 51 What has to physically exist on paper — stamps, signatures, originals — and who is responsible for having it ready before it is needed?
- 52 When a customer's legal team wants changes, who handles that conversation, and how long does it typically add?
- 53 Where are executed agreements kept? If I asked for one from two years ago, how long would it take?
- 54 Are there fields in your agreements that different templates fill in differently — dates, payment terms, account details? How would you know?
- 55 Who is the last person to read an agreement before it goes to the customer, and what are they checking for?
- 56 What happens to the paperwork after signature — who collects it, who files it, who needs a copy?

07 Finance and funding

- 57 Where does the money to buy vehicles come from, and does the process differ by funder?
- 58 Follow-up: how many different funder processes does your team have to remember, and where is each one written down?
- 59 What has to be assembled and sent for a funder to release money? Who assembles it?
- 60 Between what the funder pays and what the vehicle costs, someone covers the difference. Who calculates that figure, and who checks it?
- 61 What is the document or list that tells finance exactly what to pay and to whom? Who prepares it, who verifies it?
- 62 Follow-up: how does a late change — an extra discount, a price revision — reach that list before payment goes out?
- 63 How do you verify a supplier's bank details before paying them?
- 64 Once a vehicle is on the road, what triggers the first invoice — and how does the invoicing person learn the trigger has happened?
- 65 Where do customer payments land, and does that vary by contract? Who would know which account applies to which customer?

08 Insurance and claims

- 66 Who arranges insurance on a new vehicle, and at what point in the process?
- 67 Whose name goes on the policy, and what decides that?
- 68 Who checks the policy against the actual vehicle and the actual contract before it is accepted?
- 69 When a vehicle is damaged, who does the customer call first? What happens in the next hour?

- 70 Who follows a claim to completion, and how do they remember to?
- 71 Renewals — how does anyone know a policy is about to expire?
- 72 Has a claim ever been complicated by something on the policy not matching reality? What was it?

09 Fleet in service and aftersales

- 73 Once a vehicle is with a customer, what are the things your team is still responsible for?
- 74 How does a customer raise a problem, and who receives it? Is that the same person every time?
- 75 How do you know a vehicle's servicing is being done, and who chases it?
- 76 How is actual usage — distance covered — tracked against what the contract assumed? Who checks, and how often?
- 77 Follow-up: what happens when a vehicle is clearly going to breach the contracted usage? At what point does someone tell the customer?
- 78 What statutory or periodic obligations attach to each vehicle, and where is the list of what falls due when?
- 79 When a contract is approaching its end, who starts that conversation and how far in advance?
- 80 A vehicle comes back at the end of a term — who inspects it, who photographs the condition, and who decides what the customer is charged?
- 81 Follow-up: how is that charge negotiated, and who has authority to waive it?

10 Collections

- 82 When a customer does not pay, how long before someone notices?
- 83 Who notices — a person checking, or a customer complaining about something else?
- 84 What is the sequence of chasing, and who does each stage?
- 85 At what point does it escalate, and to whom?
- 86 Where is the record of what was said to a customer about an overdue amount?
- 87 How does the person chasing payment know whether the customer has a genuine dispute versus is simply late?
- 88 What is the oldest unpaid amount on your books, and could you tell me that without asking anyone?

11 Management, data and IT

- 89 What report do you personally look at to know how the business is doing, and who prepares it?
- 90 Follow-up: how long does preparing it take, and how much of that is copying from one place to another?
- 91 When two people give you different numbers for the same thing, how do you decide which is right?
- 92 If someone asked you today how many vehicles you have on lease, how long would it take to answer with confidence?
- 93 Which single spreadsheet, if it were lost tomorrow, would hurt the most?
- 94 Who has access to it, and is there a copy anywhere else?
- 95 Where does the same information get typed in more than once across the business?
- 96 Which step in your whole process most often stalls, and what is it waiting for?
- 97 If one specific person did not come to work for a month, what would stop?
- 98 What do you currently not know that you wish you knew?

12 The project itself

WHAT THEY ALREADY RUN

- 99 What software is your business using right now — accounts, banking, tracking, anything — and who inside the company actually opens each one?
- 100 Which of those does the new system have to talk to, and which could be replaced entirely?
- 101 Follow-up: for the ones it must talk to — what would need to pass between them, in which direction, and how often?
- 102 Is there anything you're required to file or report to an outside body — and does that come out of one of these systems today?

WHAT HISTORY COMES ACROSS

- 103 What data would you want inside the new system on day one, and how far back does it go?
- 104 Where does that data physically live — one spreadsheet, twenty, a system someone built, paper files?
- 105 Follow-up: if I opened that spreadsheet right now, would every row be filled in the same way, or has each person entered things their own way over the years?

WHO USES IT

- 106 How many people would log in — and for each team, are they at a desk, on a phone, or out on site?
- 107 Who needs to see everything, and who should only see their own work?
- 108 Is there anyone who has to use this who doesn't currently use software for their job at all?

HISTORY WITH SOFTWARE

- 109 Have you bought or built software for this before? What happened to it?
- 110 Follow-up: if it stopped being used, what was the actual reason — it was wrong, it was slow, one person left, people just went back to Excel?
- 111 What's the one thing a new system could do that would make your team choose it over what they do today?

THE BAD DAY

- 112 Describe your busiest, worst day of the month or the year. What breaks first?
- 113 When an audit or an outside check happens, what does someone have to go and assemble by hand?

WHO DECIDES

- 114 Who signs off on something like this, and what do they need to see before they will?
- 115 What else is competing for the same budget this year?
- 116 If this goes ahead, who inside your company owns it — who do my team speak to every week?
- 117 What would make you consider this project a failure twelve months from now?