

# Customer Tech Stack and Software Integration Survey

Please complete this survey to help us understand your current technology infrastructure and software integration requirements. This document is formatted for printing and manual completion.

## 1. General Information

Company Name:

Contact Name:

Job Title:

Contact Email:

Contact Phone Number:

## 2. Current Core Tech Stack

Primary Cloud Provider (e.g., AWS, Azure, Google Cloud, On-Premise):

Customer Relationship Management (CRM) Software (e.g., Salesforce, HubSpot):

Enterprise Resource Planning (ERP) System (e.g., SAP, NetSuite, Oracle):

Identity & Access Management / IdP (e.g., Okta, Active Directory):

Primary Productivity Suite (e.g., Microsoft 365, Google Workspace):

Internal Communication Tools (e.g., Slack, Microsoft Teams):

Project Management Tools (e.g., Jira, Asana, Monday.com):

## 3. Software Integration Requirements

List the software systems that must integrate with our product (comma separated):

What is your preferred method of integration? (e.g., REST API, Webhooks, SFTP, iPaaS like Zapier/MuleSoft):

What data fields or objects are most critical to sync between systems?

How frequently does data need to be synchronized? (e.g., Real-time, Hourly, Daily):

## 4. Pain Points & Future Plans

What is your biggest pain point with your current software integrations?

Are you planning to decommission or migrate any of your core systems in the next 12 months? (If yes, specify):

Are there any security, compliance, or data residency requirements we should be aware of? (e.g., GDPR, HIPAA, SOC2):

Additional comments or specific integration workflows required: