



People Services

Build Culture Intentionally. Not Just Hopefully.

Client Intake Questionnaire

Question. Qualify. Quantify.

Instructions

Please complete this questionnaire as thoroughly as possible prior to your Discovery Session. Your responses help us understand your current landscape and tailor our assessment to your specific needs.

If a question does not apply, please write "N/A". If you are unsure, provide your best estimate — we will validate all data during our assessment phase.

Estimated completion time: 30–45 minutes

Building smarter, more resilient systems by aligning technology, people and strategy. Unleashing potential at every level.

CONFIDENTIAL

Section A: Organization Information

Organization Name: _____

Primary Contact: _____

Title / Role: _____

Email: _____

Phone: _____

Industry / Vertical: _____

Organization Size: _____

Headquarters: _____

Locations: _____

Annual Revenue: _____

HR / People Budget: _____

Average Tenure (Yrs): _____

Annual Turnover Rate: _____

Organization description, industry context, growth stage: _____

Section B: HR / People Function

HR Team Size: _____

HR Leader Title: _____

CHRO / VP People: _____

Reports To: _____

HR Function:

☐ Strategic

☐ Operational

☐ Admin

☐ Outsourced

☐ None

Internal HR Capabilities:

☐ Recruitment

☐ Onboarding

☐ Comp & Benefits

☐ L&D;

☐ Performance Mgmt

☐ Employee Relations

☐ People Analytics / HRIS

☐ Compliance / Policy

☐ DEI / Culture

☐ Org Design

☐ Succession Planning

☐ Employee Wellness

HRIS Platform: _____

ATS System: _____

Biggest HR / People function challenges: _____

Section C: Talent Acquisition & Hiring

Avg Open Roles: _____

Avg Time-to-Hire: _____

Offer Accept Rate: _____

90-Day Retention: _____

Hiring Methods:

☐ Job Boards

☐ Employee Referrals

☐ Agencies

☐ LinkedIn / Social

☐ Internal Mobility

☐ Campus / University

☐ Executive Search☐ AI Sourcing☐ Diversity-Focused**Structured Interviews?**☐ Formal☐ Informal☐ Varies☐ None**Objective Assessments?**☐ Psychometric☐ Skills Tests☐ Work Samples☐ Case Studies☐ None**Psychometric tests used (instruments, how results are applied):**

Common reasons new hires don't succeed in first year:

Section D: Employee Wellbeing & Mental Health**EAP?**☐ Active☐ Underutilized☐ No**EAP Provider:****EAP Utilization Rate:****Mental Health Benefits?**☐ Comprehensive☐ Basic☐ None☐ Unsure**Wellbeing Programs & Resources:**☐ Mental Health Days☐ Flexible Work☐ Wellness Stipend☐ Fitness / Gym☐ Meditation / Mindfulness☐ Peer Support☐ Manager MH Training☐ Critical Incident Support☐ Corporate Therapy☐ Burnout Prevention☐ Return-to-Work Support☐ None**Psychological Safety:**☐ Measured☐ Informal☐ Not Measured**Absenteeism Rate:****Presenteeism Concerns:****Your approach to wellbeing — what's working and what's missing:**

Specific wellbeing challenges driving this engagement:

Section E: Leadership Development & Coaching**Leadership Program?**☐ Yes☐ In Development☐ No**Annual L&D; Budget/FTE:****Executive Coaching?**

Succession Plan?

☐ Active

☐ Informal

☐ None

360 Feedback?

☐ Regular

☐ Occasional

☐ Never

Development Offerings:

☐ Executive Coaching

☐ First-Time Mgr Program

☐ Mentoring

☐ Leadership Cohorts

☐ Technical Training

☐ Soft Skills / EQ

☐ Psychometric-Based Dev

☐ Cross-Functional Rotations

☐ External Conferences

☐ No Formal Offerings

Biggest leadership gaps:

Psychometric use in leadership development (instruments, experience):

Section F: Organizational Culture & Design

Values Defined?

☐ Yes

☐ Partially

☐ No

Engagement Survey?

☐ Annual

☐ Pulse

☐ Ad Hoc

☐ Never

Last Engagement Score:

Response Rate:

DEI Strategy?

☐ Formal

☐ Informal

☐ None

☐ In Development

Culture & Communication:

☐ Town Halls

☐ Skip-Level Meetings

☐ Anonymous Feedback

☐ Recognition Program

☐ Team Building

☐ Culture Committee

☐ Employer Brand

☐ Onboarding Culture

☐ Exit Interviews

Describe your organizational culture in 2–3 sentences:

Culture aspects you're most concerned about:

Section G: Performance & Retention

Review Cadence:

☐ Annual

☐ Semi-Annual

☐ Quarterly

☐ Continuous

☐ None

Framework:

☐ OKRs
 ☐ KPIs
 ☐ Competency
 ☐ Informal
 ☐ None

Voluntary Turnover:

Involuntary Turnover:

Avg Cost-per-Hire:

Regrettable Turnover:

Internal Mobility Rate:

Stay Interviews?

☐ Yes
 ☐ No

Exit Interviews?

☐ Formal
 ☐ Informal
 ☐ None

Top reasons employees leave:

Current retention strategies:

Section H: People Goals & Priorities

Top 3 People Priorities (Next 12 Months):

What does success look like for this engagement?

Urgency Assessment — Rate 1 (Not Urgent) to 5 (Critical):

	1	2	3	4	5
Talent Acquisition & Fit Assessment	☐	☐	☐	☐	☐
Employee Wellbeing & Corporate Therapy	☐	☐	☐	☐	☐
Leadership Development & Coaching	☐	☐	☐	☐	☐
Organizational Culture & Design	☐	☐	☐	☐	☐
Performance & Retention Strategy	☐	☐	☐	☐	☐
HR Strategy & People Operations	☐	☐	☐	☐	☐

Psychometric & Wellbeing Readiness

Open to psychometric testing?

☐ Yes
 ☐ Exploring
 ☐ Hesitant
 ☐ No

Open to corporate therapy?

☐ Yes
 ☐ Exploring
 ☐ Hesitant
 ☐ No

Concerns or questions about psychometric testing or corporate therapy:

Previous experience with psychometric assessments (positive or negative):

Data privacy concerns?

☐ High
 ☐ Moderate
 ☐ Low
 ☐ None

Authorization & Sign-Off

By signing below, I confirm that the information provided is accurate to the best of my knowledge. I authorize rethinQ Solutions to use the information and access the platforms referenced in this document for the purposes of our engagement.

Signature:

Date:

Printed Name:

Title:
