



Technology Services

Modernize Strategically. Not Just Digitally.

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: Company Information

Company / Legal Name:

Primary Contact:

Title / Role:

Email:

Phone:

Industry / Vertical:

Company Size (FTE):

Headquarters:

Other Locations:

Annual Revenue:

IT Budget (Annual):

Brief Description of Business:

Section B: IT Team & Leadership

IT Team Size:

IT Leadership Title:

CTO / CIO / VP Eng:

Reports To:

Dedicated IT Dept?

☐ Yes

☐ No

☐ Outsourced

☐ Hybrid

Internal IT Functions:

☐ Help Desk / Support

☐ Infrastructure Mgmt

☐ Software Development

☐ DevOps / SRE

☐ Data / Analytics

☐ Cybersecurity

☐ Project Management

☐ Vendor Management

☐ AI / Automation

Key IT Team Challenges:

Section C: Current Technology Stack

Core Business Systems:

☐ ERP (SAP, NetSuite, Dynamics)

☐ CRM (Salesforce, HubSpot)

☐ HRIS/HCM (Workday, BambooHR)

☐ Accounting (QuickBooks, Xero)

☐ Project Mgmt (Jira, Asana)

☐ Communication (Teams, Slack)

☐ Document Mgmt (SharePoint, GDrive)

☐ E-Commerce Platform

☐ Custom-Built Applications

Cloud & Infrastructure:

☐ AWS

☐ Azure

☐ Google Cloud (GCP)

☐ On-Premises Servers

☐ Hybrid Cloud

☐ Private Cloud

☐ Colocation

☐ No Cloud

☐ Other

Development & DevOps:

☐ GitHub / GitLab / Bitbucket

☐ CI/CD Pipelines

☐ Docker / Kubernetes

☐ Terraform / IaC

☐ Monitoring (Datadog, etc.)

☐ APM / Logging

☐ No Formal DevOps☐ Other**Data & Analytics:**☐ BI Tool (Power BI, Tableau)☐ Data Warehouse (Snowflake)☐ ETL / Pipeline Tools☐ Excel Only☐ No Formal Analytics☐ Other**Additional Tools:**

Systems You Are Most Dissatisfied With:

Section D: AI & Automation Readiness

Current AI Adoption Level:☐ None☐ Exploring☐ Piloting☐ Active☐ Advanced**AI / Automation Tools in Use:**☐ ChatGPT / Claude / Gemini☐ Microsoft Copilot☐ GitHub Copilot☐ Custom AI Models / LLMs☐ RPA (UiPath, etc.)☐ Chatbots / Virtual Assistants☐ Predictive Analytics / ML☐ AI Marketing Tools☐ No AI Tools Currently**Current AI/Automation Initiatives:**

Processes That Would Benefit from AI:

AI Adoption Barriers/Concerns:

Data Readiness for AI:☐ Yes☐ Partially☐ No☐ Unsure

Section E: Infrastructure & Security

Hosting Provider:

Uptime SLA Target:

DR Plan in Place?**(Yes/Partial/No):**

Last DR Test:

Monthly Cloud Spend:

YoY Cloud Cost Trend:

Backup Strategy:

Security Measures:☐ MFA / 2FA☐ SSO☐ VPN☐ Endpoint Protection☐ SIEM / SOC☐ Encryption at Rest

- | | | |
|---|--|---|
| ☐ Encryption in Transit | ☐ Firewall / WAF | ☐ Pen Testing |
| ☐ Vulnerability Scanning | ☐ Security Training | ☐ Incident Response Plan |
| Compliance Requirements: | | |
| ☐ SOC 2 | ☐ ISO 27001 | ☐ HIPAA |
| ☐ PCI DSS | ☐ GDPR / PIPEDA | ☐ FedRAMP |
| ☐ NIST | ☐ Industry-Specific | ☐ None / Unsure |
| Recent Security Incidents/Concerns: | | |

Section F: Digital Maturity & Processes

Digital Maturity Level:

- | | | | |
|--------------------------------|-------------------------------------|--------------------------------------|-----------------------------------|
| ☐ Early | ☐ Developing | ☐ Established | ☐ Advanced |
|--------------------------------|-------------------------------------|--------------------------------------|-----------------------------------|

Manual Processes Still in Use:

- | | | |
|--|--|--|
| ☐ Invoicing/Billing | ☐ Procurement | ☐ Employee Onboarding |
| ☐ Customer Onboarding | ☐ Reporting | ☐ Approvals/Sign-offs |
| ☐ Inventory Mgmt | ☐ Contract Mgmt | ☐ Scheduling/Dispatch |

Biggest Technology Bottleneck:

Tech Investments (Past 12 Months):

Stalled/Failed Initiatives & Reasons:

Section G: Systems Integration & Data

System Integration Level:

- | | | |
|---|---|---|
| ☐ Fully Integrated | ☐ Partially Siloed | ☐ No Integration |
|---|---|---|

Key Integrations in Place:

Where Data Silos Cause Pain:

Single Source of Truth?

- | | | |
|------------------------------|-----------------------------|------------------------------------|
| ☐ Yes | ☐ No | ☐ Partially |
|------------------------------|-----------------------------|------------------------------------|

Data Quality Confidence:

- | | | | |
|-------------------------------|---------------------------------|------------------------------|----------------------------------|
| ☐ High | ☐ Medium | ☐ Low | ☐ Unknown |
|-------------------------------|---------------------------------|------------------------------|----------------------------------|

Current Reporting/Analytics Capabilities:

Section H: Technology Goals & Priorities

Top 3 Technology Priorities (Next 12 Months):

What Does Success Look Like?

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

	1	2	3	4	5
AI & Automation	■	■	■	■	■
Cloud / Infrastructure	■	■	■	■	■
Digital Transformation	■	■	■	■	■
Data & Analytics / BI	■	■	■	■	■
Systems Integration	■	■	■	■	■
IT Strategy & Governance	■	■	■	■	■

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: