

rethinQ

SOLUTIONS

Technology Services Division

Modernize Strategically. Not Just Digitally.

Client Onboarding & Consulting Framework

Question. Qualify. Quantify.

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

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CONFIDENTIAL

1. Who We Are

rethinQ Solutions is not a firm. We are not an agency. We are a curated collective of elite, independent contractors who assemble under the rethinQ banner when the problem demands it — and dissolve when the work is done. No permanent payroll. No overhead-driven recommendations. No standing army waiting for a war.

We serve clients facing challenges that don't fit neatly into the service catalogues of established vendors. Our value isn't just what we deliver — it's the vantage point we bring. A different perspective on complex problems. Creative, tailored, unconventional.

We aim to build with AI, democratize knowledge, and provide value-based solutions and services for our clients.

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

Our Four Service Pillars

GROWTH	TECHNOLOGY	SECURITY	PEOPLE
Revenue acceleration, pipeline generation, digital presence, vendor coordination	AI integration, cloud strategy, digital transformation, systems architecture	Cyber and physical risk, compliance, incident response, property profiling	Psychometric-informed talent, corporate therapy, leadership, culture design

We assess before we advise. We measure before we build.

A strategic alternative. An agile perspective. A precise instrument.

2. Your rethinQ Associate

A Trusted Advisor Who Works For You — Not The Vendors

Every rethinQ Associate is a hands-on strategist with real-world execution experience. They embed with your team, learn your business inside and out, and take full ownership of sourcing, negotiating, and overseeing every vendor relationship on your behalf — across technology and beyond. One advisor. Full oversight. No competing agendas.

The Challenge

Cloud vendors, MSPs, AI tool companies, and software resellers are all pitching their stack. Nobody is evaluating your actual technology maturity, and nobody is accountable for whether these investments deliver real business outcomes.

The rethinQ Approach

Your rethinQ Associate conducts a full technology maturity assessment, maps the gaps, and sources the right partners for each — from cloud architecture to AI implementation — then sources and manages the right partners across every dimension. One advisor for your entire technology strategy.

How It Works

- 1. Diagnose.** Your Associate runs a comprehensive technology assessment to establish a clear baseline using rethinQ's proprietary intake questionnaires and maturity scorecards.
- 2. Source & Align.** Instead of disconnected vendors, your Associate builds a unified technology strategy, sources the right specialists, and coordinates delivery across the full stack.
- 3. Measure & Sustain.** Ongoing oversight with clear KPIs, sprint reviews, and quarterly reassessments. Your Associate holds every vendor accountable to measurable outcomes.

Built-in Accountability

One advisor. One technology strategy. One point of trust. Full vendor accountability. No more siloed agencies working at cross-purposes.

3. Technology Services Division — Overview

The Technology Services Division helps clients modernize, optimize, and future-proof their technology infrastructure. We assess the current technology landscape, identify gaps and inefficiencies, and design solutions that align technology investments with business objectives — with a particular emphasis on practical AI integration and intelligent automation. Every engagement is anchored by a dedicated rethinQ Associate.

Technology Services Catalogue

Service Area	What We Deliver	Key Outcomes
AI Integration & Automation	AI readiness assessments, workflow automation, LLM/AI tool implementation, custom AI agent development, prompt engineering strategy, AI governance	Reduced manual workload, faster decision-making, scalable AI-powered operations
Infrastructure & Cloud Services	Cloud migration, infrastructure audits, hybrid/multi-cloud architecture, cost optimization, performance tuning, disaster recovery	Improved uptime, reduced infrastructure costs, scalable architecture, business continuity
Digital Transformation	Process digitization, legacy system modernization, workflow redesign, change management for technology adoption, digital roadmap creation	Streamlined operations, eliminated paper-based processes, faster time-to-market
Data & Analytics / BI	Data architecture design, BI dashboard development, data pipeline engineering, reporting automation, data quality audits, predictive analytics	Data-driven decision-making, real-time visibility, actionable insights, single source of truth
Systems Integration & Custom Development	API integration strategy, custom application development, platform consolidation, middleware solutions, vendor selection, tech stack optimization	Unified ecosystem, eliminated data silos, reduced tool sprawl, seamless workflows
IT Strategy & Governance	Technology roadmap development, IT budget optimization, vendor management, technology policy creation, compliance alignment, CTO-as-a-service	Clear vision, optimized IT spend, reduced technical debt, governance aligned with business goals

4. Client Onboarding Framework

Every Technology engagement follows a structured five-phase onboarding process. Your rethinQ Associate guides you through each phase, ensuring deep understanding of your existing technology landscape, constraints, and strategic objectives before recommending solutions.

Phase 1: Discovery & Intake (Week 1)

Objective: Understand the client's current technology stack, infrastructure maturity, business processes, and strategic goals.

Key Activities:

- Conduct a 90-minute Executive Discovery Session with CTO/CIO, IT leadership, and key business stakeholders
- Distribute and collect the rethinQ Technology Intake Questionnaire covering current tech stack, infrastructure, vendor relationships, IT team structure, pain points, and digital maturity
- Gather access to architecture documentation, system diagrams, cloud dashboards, monitoring tools, and IT asset inventories
- Review existing IT policies, security configurations, disaster recovery plans, and compliance requirements
- Map the current technology decision-making process and budget allocation across departments

Deliverable: Completed Technology Profile & Discovery Summary Report

Phase 2: Current State Assessment (Weeks 2–3)

Objective: Perform a comprehensive audit across all technology functions to establish a maturity baseline and identify critical gaps.

Assessment Area	What We Evaluate	Scoring
AI & Automation Readiness	AI adoption, automation maturity, data readiness for AI, internal AI literacy, opportunities for AI-driven workflows	1–5 Maturity Score
Infrastructure & Cloud	On-prem vs cloud ratio, cloud architecture, uptime, DR readiness, cost efficiency, scalability	1–5 Maturity Score
Digital Maturity	Process digitization, legacy dependency, digital tool adoption, workflow efficiency, innovation capacity	1–5 Maturity Score
Data & Analytics	Data architecture, reporting, data quality, pipeline reliability, self-service analytics, predictive capabilities	1–5 Maturity Score
Systems & Integration	Tool sprawl, API connectivity, data flow, platform consolidation opportunities, technical debt	1–5 Maturity Score

Assessment Area	What We Evaluate	Scoring
IT Governance & Strategy	Technology roadmap, IT budget alignment, vendor management, policy maturity, compliance, leadership capacity	1–5 Maturity Score

Deliverable: rethinQ Technology Maturity Scorecard — scored, visual assessment across all six dimensions with identified gaps and opportunities.

Phase 3: Gap Analysis & Service Matching (Week 4)

Objective: Translate assessment findings into a prioritized action plan, mapping gaps to specific rethinQ Technology services and vendor partners.

Key Activities:

- Generate the Technology Gap Matrix: visual map of current state vs. target state for each assessment dimension
- Prioritize gaps using an Impact vs. Effort framework (quick wins, strategic projects, long-term investments), factoring in risk and dependencies
- Match each gap to one or more rethinQ Technology services with estimated timelines and resource requirements
- Identify and shortlist vendor partners — your Associate manages all sourcing, scoping, and negotiation
- Develop a phased Technology Roadmap with clear milestones, dependencies, risk mitigations, and success criteria
- Define KPIs and prepare preliminary investment estimates with build vs. buy recommendations

Service Matching Decision Logic

If Assessment Reveals...	Primary Service Match	Supporting Services
Low AI adoption, manual-heavy workflows, poor data readiness	AI Integration & Automation	Data & Analytics, Digital Transformation
Aging infrastructure, poor uptime, no DR plan, unoptimized cloud spend	Infrastructure & Cloud Services	IT Strategy, Systems Integration
Paper-based processes, legacy dependency, low digital tool adoption	Digital Transformation	AI & Automation, Systems Integration
No BI dashboards, poor data quality, siloed data, no reporting automation	Data & Analytics / BI	Systems Integration, AI & Automation
Tool sprawl, disconnected systems, no API strategy, redundant platforms	Systems Integration & Custom Development	Infrastructure & Cloud, Data & Analytics

If Assessment Reveals...	Primary Service Match	Supporting Services
No technology roadmap, uncontrolled IT spend, no vendor governance	IT Strategy & Governance	Infrastructure & Cloud, Digital Transformation

Deliverable: Technology Strategy Roadmap with prioritized recommendations, vendor shortlist, investment estimates, and projected outcomes.

Phase 4: Strategy Presentation & Alignment (Week 5)

Objective: Present findings and recommendations to leadership, align on priorities, and finalize engagement scope.

Key Activities:

- Deliver a formal Technology Strategy Presentation with visual scorecards, architecture diagrams, gap analysis, and the recommended roadmap
- Facilitate a collaborative prioritization workshop to align business and IT stakeholders on sequencing, resource allocation, and risk tolerance
- Refine engagement scope based on client feedback, budget constraints, internal IT capacity, and vendor considerations
- Define the Statement of Work (SOW) including timelines, milestones, vendor assignments, governance structure, and change management plan
- Establish communication cadence (weekly stand-ups, sprint reviews, monthly executive reviews, quarterly technology reviews)

Deliverable: Signed Statement of Work, finalized project plan, architecture recommendations, and assigned rethinQ Associate and engineering team.

Phase 5: Engagement Kickoff & Execution (Week 6+)

Objective: Transition from assessment into active execution with clear ownership, vendor oversight, sprint cycles, and iterative delivery.

Key Activities:

- Your rethinQ Associate assumes ownership of all vendor relationships and active service engagements
- Launch the first 30-day sprint with clearly defined objectives, technical tasks, and measurable targets
- Deploy monitoring dashboards and KPI tracking tied to the Technology Maturity Scorecard baseline
- Establish development/staging environments and implement CI/CD pipelines where applicable
- Conduct weekly technical stand-ups and bi-weekly sprint reviews with the client's project lead
- Deliver a 30-day Progress Report with technical outcomes, architecture updates, and recommended adjustments

Deliverables: Active service delivery, technical documentation, KPI dashboards, 30/60/90-day progress reports, quarterly technology reviews.

5. Onboarding Timeline Summary

Timeline	Phase	Key Output	Client Commitment
Week 1	Discovery & Intake	Technology Profile & Discovery Summary	4–6 hours
Weeks 2–3	Current State Assessment	Technology Maturity Scorecard	Platform access + IT team availability
Week 4	Gap Analysis & Service Matching	Technology Strategy Roadmap	2–3 hours
Week 5	Strategy Presentation & Alignment	Signed SOW & Project Plan	2–4 hours
Week 6+	Engagement Kickoff & Execution	Active Delivery + Dashboards	Ongoing weekly stand-ups

6. What Your rethinQ Associate Manages

From infrastructure to AI to data — your rethinQ Associate manages every technology vendor and project. No more fragmented IT decisions. One roadmap, one advisor, full alignment with business goals.

- Cloud providers, MSPs, and infrastructure vendors
- AI tool companies, LLM platforms, and automation specialists
- Custom development shops and systems integrators
- Data engineering teams, BI consultants, and analytics platforms
- Software resellers, SaaS vendors, and technology procurement
- DevOps consultancies and managed service providers

7. Maturity Scorecard — Scoring Guide

Each assessment dimension is scored on a 1–5 maturity scale. This scoring guide ensures consistency across assessments and provides clear benchmarks for client communication.

Score	Maturity Level	Description
1	Ad Hoc	No formal technology strategy or documented processes. Activities are reactive and inconsistent. Significant unmanaged risk and missed opportunities.
2	Emerging	Basic activities exist but lack structure, consistency, or measurement. Some awareness of gaps but no clear plan to address them.
3	Defined	Formal processes exist and are documented. Core metrics are tracked. Strategy in place but execution is inconsistent or under-resourced.
4	Managed	Strategy is well-executed and data-driven. Processes are optimized with regular iteration. Performance meets or exceeds industry benchmarks.
5	Optimized	Industry-leading performance. Continuous innovation, advanced automation, and predictive capabilities. The function is a competitive differentiator.

8. Engagement Models

rethinQ Technology services are available in flexible engagement models designed to fit each client's budget, timeline, and internal capacity. Every model includes an embedded rethinQ Associate as the single point of accountability.

Model	Best For	Structure	Duration
Diagnostic Only	Independent assessment before committing to execution — ideal for board reporting, M&A, or organizational health checks	Phases 1–3: Discovery, Assessment, and Gap Analysis with full Scorecard and Roadmap	4–5 weeks
Project-Based	Targeted engagements with defined scope and deliverables	Full onboarding (Phases 1–5) scoped to specific service areas with fixed deliverables	2–6 months
Retainer / Managed Services	Ongoing program management with continuous oversight, periodic reassessments, and strategic support	Full onboarding followed by recurring monthly services with dedicated rethinQ Associate	6–12 months (renewable)

Model	Best For	Structure	Duration
Fractional CTO / VP Engineering	Senior leadership without the full-time commitment	Part-time executive placement (10–20 hrs/week) to own and drive strategy	6+ months

Ready to rethinQ your technology strategy?

Every great engagement begins with a structured conversation. Reach out to start your Discovery phase.

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Stay curious & rethinQ your potential.