

# Polus LLC — Client Readiness & Intake Checklist

Fillable • Print-friendly • ~10–15 minutes

Fill what you can. If you're unsure, leave it blank — we'll cover it in the free discovery call.

## 1) Basics

Company name

Primary contact (name + title)

Email

Phone (optional)

Location / service area

Industry

Team size

Remote / hybrid / on-site

## 2) Outcomes (pick up to 3)

Reduce delays / handoff confusion

Standardize processes and SOPs

Improve onboarding/offboarding

Improve Microsoft 365 setup/governance

Stabilize IT / reduce recurring issues

Strengthen backups / disaster recovery

Build or improve a website

Build an MVP / define requirements (PRD)

Automate manual work (no-code / workflows)

Create a service desk / better ticket intake

Other:

In one sentence: “If we fix this, it will help because...”

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Section 3–4 (timing & pain points)

## 3) Urgency & timeline

When do you need improvement to begin?

Is there a deadline driving this?

Time your team can commit per week

Urgency (low / med / high)

## 4) Where you feel pain today (check all that apply)

### Operations

- Work is undocumented / tribal knowledge
- Different people do the same job differently
- Bottlenecks / rework / approvals slow us down
- No clear metrics / no dashboard
- Hiring/onboarding is inconsistent
- Tools are messy / duplicated

### IT

- Password/access chaos
- Device setup is inconsistent
- Frequent outages / recurring issues
- Backup/recovery is uncertain
- No clear inventory of users/devices/licenses
- Security basics are unclear or inconsistent

### Top 3 problems (brief)

1)

2)

3)

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Section 5–6 (processes & tools)

## 5) Processes you want help with (list up to 5)

Example: onboarding, invoicing, estimating, ticket intake, procurement, project handoff.

Process 1

Process 2

Process 3

Process 4

Process 5

For Process #1, define the boundaries (so we map it correctly):

## 6) Current tools (operations)

Accounting / invoicing tool (name)

Project / task tool (name)

Documentation tool (SOPs/wiki)

Forms / intake tool

Other key tools

What's working well right now?

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Section 7–9 (M365, devices, backups)

## 7) Microsoft 365 (IT baseline)

Do you have Microsoft 365 today?

Tenant ownership is clear?

Licensing type (if known)

Identity (cloud-only / hybrid)

MFA enabled for all users?

Shared mailboxes/groups organized?

SharePoint permissions under control?

## 8) Devices & endpoint management

Device types (Windows/Mac/Mixed)

Approx device count

Device setup standardized?

Any endpoint management (Intune/MDM)?

New hires fully set up in 1 day?

## 9) Backups & disaster recovery

Critical systems/data (brief)

Backups exist for critical data?

Last restore test performed?

RTO (how long you can be down)

RPO (acceptable data loss)

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Section 10–13 (support, web, automation, access)

## 10) Service desk / support

How do people request help today? (Teams/email/tickets/other)

Biggest support pain (brief)

## 11) Web / digital presence (if applicable)

Do you have a website?

Primary goal (credibility/lead gen/hiring/portal)

Needed updates (copy/design/speed/SEO/forms/booking/payments/other)

## 12) Automation & no-code opportunities

If you could automate ONE thing first, what is it?

## 13) Access & readiness (optional)

Admin contact for Microsoft 365

Current SOPs/docs (even messy)

A list of users and roles

Current process examples (emails/forms/spreadsheets)

A list of devices (or ability to export)

Vendor contacts (ISP, app vendors, etc.)

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Section 14–15 (budget & notes)

## 14) Budget comfort (optional)

I want the lowest-cost starting option

Hourly is fine

I'm open to a fixed-scope package

Not sure yet

### If you want to share a range (optional)

<\$500

\$500–\$2k

\$2k–\$5k

\$5k+

## 15) Notes

Anything else we should know?

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