

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)
<input type="text"/>	<input type="text"/>
Email	Phone (optional)
<input type="text"/>	<input type="text"/>
Location / service area	Industry
<input type="text"/>	<input type="text"/>
Team size	Remote / hybrid / on-site
<input type="text"/>	<input type="text"/>

2) Outcomes (pick up to 3)

Reduce delays / handoff confusion	Strengthen backups / disaster recovery
Standardize processes and SOPs	Build or improve a website
Improve onboarding/offboarding	Build an MVP / define requirements (PRD)
Improve Microsoft 365 setup/governance	Automate manual work (no-code / workflows)
Stabilize IT / reduce recurring issues	Create a service desk / better ticket intake
Other:	<input type="text"/>

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):

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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
- A list of users and roles
- A list of devices (or ability to export)

- Current SOPs/docs (even messy)
- Current process examples (emails/forms/spreadsheets)
- Vendor contacts (ISP, app vendors, etc.)

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Section 14–15 (budget & notes)

14) Budget comfort (optional)

<input type="checkbox"/> I want the lowest-cost starting option	<input type="checkbox"/> Hourly is fine
<input type="checkbox"/> I'm open to a fixed-scope package	<input type="checkbox"/> Not sure yet

If you want to share a range (optional)

<input type="checkbox"/> <\$500	<input type="checkbox"/> \$500–\$2k	<input type="checkbox"/> \$2k–\$5k	<input type="checkbox"/> \$5k+
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15) Notes

Anything else we should know?