

IT Support

DISCOVERY QUESTIONNAIRE

Help us understand your business so we can provide the best IT solutions to support your goals. Please complete this questionnaire ahead of our initial strategy call.

About Your Business

1. **Business Name:**
2. **Main Contact Name & Role:**
3. **Email & Phone:**
4. **Industry/Sector:**
5. **Number of Employees (Full-time & Part-time):**
6. **Locations & Sites:** (List all physical locations or remote teams)

Current IT Situation

7. Do you have an internal IT team or use external IT support?

- ☐ Internal
- ☐ External provider
- ☐ Combination
- ☐ None

8. What software platforms does your business rely on most?:

(e.g., Microsoft 365, Google Workspace, CRMs, accounting, etc.)

9. What hardware do you primarily use?

(e.g., desktops, laptops, mobile devices, servers)

10. Any known or recent IT issues/challenges?

- ☐ Security breaches/virus incidents
- ☐ Slow systems/performance
- ☐ Data loss or backup problems
- ☐ Other (please specify):

Security & Data

11. How is your data currently backed up?

- ☐ Cloud
- ☐ On-premises
- ☐ Not sure

12. Do you have a cyber security policy and user training in place?

- ☐ Cloud
- ☐ On-premises
- ☐ Not sure

13. Any concerns about compliance or regulatory requirements?

16. Are there any key projects or changes planned (e.g. office move, cloud migration, upgrades)?

Business Goals & IT Priorities

14. What are your top 2–3 business priorities for the next 12 months?

15. How do you see IT supporting these goals?

Additional Notes

17. Anything else we should know about your business or IT environment?

Thank you!

Please return this form, and we'll use your answers to tailor our recommendations to your business needs.