

About Your Business

Just the basics — we'll use this to prepare before we talk.

BUSINESS / COMPANY NAME

YOUR NAME

EMAIL ADDRESS

PHONE (OPTIONAL)

INDUSTRY

1. Dental / Healthcare 2. Legal 3. Accounting / Finance 4. Architecture / Engineering 5. Real Estate
6. Non-profit 7. Retail / E-commerce 8. Construction / Trades 9. Other

NUMBER OF FULL-TIME STAFF

1. 1-5 2. 6-15 3. 16-30 4. 31-50 5. 50+

Your Devices

Rough numbers are fine — we'll confirm on the call.

■ Laptops / Desktops

How many:

■ Servers

How many:

■ Phones / Tablets (work)

How many:

■ Network devices

How many:

OPERATING SYSTEMS IN USE

Check all that apply

Windows 10/11

macOS

Windows Server

Linux

iOS / iPadOS

Android

ADDITIONAL NOTES ON DEVICES (OPTIONAL)

Primary OS, anything unusual, etc.

Your Current Setup

Understanding what you have today helps us figure out what needs attention first.

CURRENT IT SUPPORT SITUATION

1. No IT support — we handle it ourselves 2. We call someone when things break (ad-hoc)
3. Part-time / freelance IT person 4. Existing MSP we're looking to switch 5. In-house IT staff

SOFTWARE YOUR TEAM USES DAILY

Check all that apply

- | | |
|---|---|
| <input type="checkbox"/> Microsoft 365 | <input type="checkbox"/> Google Workspace |
| <input type="checkbox"/> QuickBooks | <input type="checkbox"/> Slack |
| <input type="checkbox"/> Dropbox | <input type="checkbox"/> Salesforce |
| <input type="checkbox"/> Industry-specific software | <input type="checkbox"/> Other cloud apps |

BACKUP SOLUTION

1. Cloud backup (OneDrive, Backblaze, etc.) 2. Local / external drives 3. Both cloud and local
4. No backup in place 5. Not sure

ANTIVIRUS / ENDPOINT SECURITY

1. Yes — paid / managed antivirus 2. Just Windows Defender (built-in) 3. No / not sure

What's Not Working?

Check everything that resonates — no issue is too small.

COMMON ISSUES — CHECK ALL THAT APPLY

- | | |
|---|---|
| <input type="checkbox"/> Slow / unreliable computers | <input type="checkbox"/> Worried about data loss |
| <input type="checkbox"/> Security / ransomware concerns | <input type="checkbox"/> No one to call when things break |
| <input type="checkbox"/> Painful staff onboarding / offboarding | <input type="checkbox"/> Remote work problems |
| <input type="checkbox"/> Unpredictable IT costs | <input type="checkbox"/> WiFi or network issues |
| <input type="checkbox"/> Email / spam problems | <input type="checkbox"/> Printer / peripheral headaches |

DESCRIBE YOUR SITUATION IN YOUR OWN WORDS

What's the most frustrating thing? What would you most like fixed?

HOW URGENT IS GETTING IT SUPPORT SORTED?

1. 1 — Not urgent 2. 2 3. 3 — Moderate 4. 4 5. 5 — Very urgent

Anything Else?

Last step — then we're done.

ANYTHING SPECIFIC YOU'D LIKE TO DISCUSS ON THE CALL?

e.g. We had a virus last year and want to prevent it happening again...

BEST TIME TO CONNECT (OPTIONAL)

e.g. Weekday mornings, after 3pm, Fridays...

How to submit

Email this completed PDF to: support@owenbatessolutions.ca

We'll follow up within 1 business day to book your free discovery call.

NAME

DATE
