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Initial Assessment

A starting point for our fit call

Short answers are welcome. Skip anything you are unsure about; “unknown” is okay.

This form is optional. Prefer to talk first? Email cliff@bakersconsult.com.

To return it: download and open in a PDF reader, type your answers, then save a completed copy and attach it to an email to cliff@bakersconsult.com.

Before sharing information

Please do not include passwords, access tokens, tax returns, account numbers, detailed financial records, medical information, or identifiable customer or employee records in this questionnaire. We will agree what evidence is needed, the purpose, permitted recipients, and a suitable transfer method before collecting records.

Business and contact

Business name and website, if available

Contact name, role, and preferred business contact method

What does your business provide, and who does it serve?

Approximate team size and locations

Who should join the fit call, and what is their role?

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What you want to improve

Answer what is useful now. We can explore the rest during the fit call.

1. What prompted you to reach out now?

2. Where does work get delayed, repeated, corrected, or sent back? Give one recent example without customer or employee identifying details.

3. What does that issue affect: customer experience, quality, time, capacity, follow-up, billing, or something else?

4. What would a better result look like? What must remain reliable as things change?

5. What have you already tried, and what happened?

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A possible starting workflow

A rough picture is enough. Please do not attach business records yet.

6. If we studied one workflow first, which would you choose? What starts it, and what counts as finished?

7. Which location, roles, teams, and tools are involved? Where does the work change hands?

8. How often does the issue occur? Is your answer measured, estimated, or unknown? Name the type of record that could help check it; do not attach records yet.

9. What unusual cases, busy periods, or absences make this workflow different?

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Readiness and constraints

Share only what you know. Budget is optional.

10. Who owns the workflow, and who approves scope and spending?

11. Could the team make time for interviews and review representative, redacted examples? What access or scheduling restrictions should we know about?

12. Is there a deadline or event driving this? What is fixed, and what is flexible?

13. Have you set a budget expectation, or do you need a scoped proposal before deciding? Optional response.

14. Are there confidentiality, security, or regulatory restrictions we should plan around? Describe the restriction without including sensitive records.

15. Is the need operational consulting, bookkeeping or tax services, or a combination? A combination will need separate scope and permissions.

16. What questions would you like us to answer during the fit call?