



VSD CLIENT INTAKE

PRE-ENGAGEMENT ASSESSMENT

COMPLETION STANDARD

Answer directly and honestly. VSD uses this assessment to confirm fit, protect the quality of the engagement, and prepare for the working session. Submission does not reserve a session or create a services agreement.

Before you begin

Complete every required field. Concise answers are welcome; clarity matters more than length.

Do not include Social Security numbers, banking information, passwords, access tokens, protected health information, or unredacted confidential data.

Primary contact

Full name	REQUIRED	Title / role	REQUIRED
Organization	REQUIRED	Website	
Email	REQUIRED	Phone	REQUIRED
City and state	REQUIRED	Preferred contact method	

PACKAGE, AUTHORITY & READINESS

Choose the level of clarity you need right now. Both are owner-led, scoped engagements; VSD may recommend a different level after review.

VSD SYSTEMS SNAPSHOT

\$500

One challenge | 45-minute diagnostic | Two-page Snapshot | Bottleneck | Three priority actions | 30-day direction | 15-minute handoff

VSD SYSTEMS DIAGNOSTIC

\$1,500

Broader challenge | 90-minute diagnostic | 5-7-page Architecture Map | Roles and resources | 30/60/90 | One revision | 30-minute handoff

Decision authority

- | | |
|--|--|
| ☐ I am the final decision-maker | ☐ Authority is shared |
| ☐ Another person must approve | ☐ I am gathering information only |

If authority is shared, who else must approve?

Investment readiness

- | | |
|---|--|
| ☐ Ready at selected investment | ☐ Budget is approved |
| ☐ Budget approval is pending | ☐ Need to discuss fit first |

Preferred start date

Decision deadline / milestone

What makes this request urgent now?

REQUIRED

BOUNDARY

The qualification review confirms fit. It is not a free consulting session and does not include recommendations.

CHALLENGE & INTENDED OUTCOME

What happened, changed, or became visible that prompted this request now? REQUIRED

Define the one primary system challenge you want VSD to examine. REQUIRED

What decision, result, or operating condition must this engagement help produce? REQUIRED

Why does this outcome matter now? Describe the cost of delay, inaction, rework, risk, or missed opportunity. REQUIRED

Target date	How success will be measured	REQUIRED

CURRENT SYSTEM

Describe how the work currently moves from request or idea to completion. Include the main steps, people, tools, and handoffs.

REQUIRED

Where does the system break down, slow down, create rework, lose information, or expose risk?

REQUIRED

What have you already attempted? What changed, and what remained unresolved?

REQUIRED

What measures, reports, or signals do you currently use to judge performance?

List the main tools, platforms, documents, or informal workarounds the system depends on.

PEOPLE, ROLES & DECISIONS

List the people most connected to the challenge.

NAME	ROLE	AUTHORITY	IMPACT / INTEREST

Which roles, skills, capacity, or ownership are missing or unclear? REQUIRED

Where do decisions stall, conflict, or depend on one person? REQUIRED

Which handoffs between teams, crews, vendors, leaders, or systems fail most often? REQUIRED

Who could resist the change, and what concern would they be protecting?

CONSTRAINTS, DEPENDENCIES & DIRECTION

Primary constraints

- | | |
|---|--|
| ☐ People or capacity | ☐ Roles or accountability |
| ☐ Process or handoffs | ☐ Budget or cash flow |
| ☐ Technology or data | ☐ Vendors or partners |
| ☐ Schedule or timing | ☐ Quality or rework |
| ☐ Leadership alignment | ☐ Policy or regulation |
| ☐ Materials or logistics | ☐ Other |

Identify the dependencies that must exist before progress can occur.

REQUIRED

What is non-negotiable? Include safety, quality, schedule, ownership, customer, workforce, or community requirements.

REQUIRED

What resources are already available - people, budget, tools, information, facilities, or partners?

REQUIRED

What is the greatest risk if the current system remains unchanged?

REQUIRED

30 / 60 / 90 direction

What must be true in 30 days?

REQUIRED

What must be true in 60 days?

REQUIRED

What must be true in 90 days?

REQUIRED

MATERIALS, BOUNDARIES & ACKNOWLEDGMENT

Relevant materials available

- | | |
|--|---|
| ☐ Organization chart | ☐ Process map or workflow |
| ☐ Project plan or schedule | ☐ Budget or resource plan |
| ☐ SOPs or work instructions | ☐ Metrics or performance reports |
| ☐ Role descriptions | ☐ Vendor or partner information |
| ☐ Quality or risk records | ☐ Other relevant material |

List the files or links you plan to provide. Redact information that VSD does not need.

Professional-service boundary

VSD provides business systems architecture. The engagement does not replace licensed engineering, surveying, legal, financial, safety, or regulatory services.

Licensed professionals or regulated services connected to this challenge

Applicant acknowledgment

- | | |
|--|---|
| ☐ My answers are accurate | ☐ No prohibited sensitive information included |
| ☐ Submission does not reserve a session | ☐ Implementation requires a separate scope |
| ☐ VSD may decline or redirect the request | ☐ I am authorized to share this information |

Typed name

REQUIRED

Date

REQUIRED

NEXT STEP

VSD will review the assessment for fit. If accepted, you will receive the applicable written scope, service terms, payment instructions, and scheduling steps.