

Initial Client Questionnaire

Before the first meeting

This short questionnaire helps make the first meeting more focused and useful. It is intended for an initial understanding of the business problem, without exchanging confidential technical or personal data.

IMPORTANT - do not enter:

- passwords, access codes, IP addresses or VPN credentials;
- personal data of employees or clients;
- names of confidential clients, contracts or trade secrets;
- database extracts, documents or financial amounts linked to identifiable persons;
- any information that your organisation is not authorised to share externally.

1 Basic contact information

Organisation / company name (short name is acceptable)

Name and role of contact person

Email and phone

Industry / business activity

Approximate number of employees

☐ 1-10

☐ 11-50

☐ 51-200

☐ > 200

Business problem and current workflow

2 The problem you want to solve

In one or two sentences: which process or problem currently consumes the most time?

How is this work currently performed?

Who usually participates in this process? (roles/functions only, no names)

How often does the problem occur?

☐ daily ☐ weekly ☐ monthly ☐ occasionally

What consequences does the problem most often cause? (select all that apply)

☐ time loss ☐ delays ☐ work errors
☐ poor visibility/control ☐ client dissatisfaction ☐ financial loss

Other / brief explanation

Existing systems and data

3 Where is the data currently stored?

Which systems or sources do you use? (omit vendor names if confidential)

- | | | |
|--|---|--|
| ☐ ERP / business software | ☐ CRM | ☐ accounting software |
| ☐ Excel / Google Sheets | ☐ GPS / telematics | ☐ documents / PDF |
| ☐ email | ☐ custom application | ☐ other |

Is the data stored in one or multiple databases/systems?

- | | | |
|-------------------------------------|---|----------------------------------|
| ☐ one system | ☐ multiple systems | ☐ unknown |
|-------------------------------------|---|----------------------------------|

If known, which database type is used?

- | | | |
|--|-------------------------------------|-------------------------------------|
| ☐ MySQL / MariaDB | ☐ SQL Server | ☐ PostgreSQL |
| ☐ Oracle | ☐ other | ☐ unknown |

How much do you currently trust the data shown by the system?

- | | | | |
|--|---|--|----------------------------------|
| ☐ high confidence | ☐ partial confidence | ☐ frequent errors | ☐ unknown |
|--|---|--|----------------------------------|

Which general data categories exist? (no actual records)

Is there an internal person or external partner maintaining the current system?

- | | | |
|---|--|---------------------------------------|
| ☐ yes, internal IT | ☐ yes, external partner | ☐ no / unknown |
|---|--|---------------------------------------|

At a later stage and with approval, would read-only access or a controlled export of data structure be possible?

- | | | |
|---------------------------------------|---|----------------------------------|
| ☐ probably yes | ☐ internal approval required | ☐ unknown |
|---------------------------------------|---|----------------------------------|

Desired outcome

4

What would you like to receive?

Which outcome would be most useful? (select all that apply)

- | | |
|--|--|
| ☐ automated reports | ☐ dashboard |
| ☐ alerts | ☐ text answers to questions |
| ☐ deviation monitoring | ☐ GPS / field-work analysis |
| ☐ integration of multiple systems | |

Imagine the solution already exists. What would be the first question or task you would give it?

How often do you need the results?

- | | | |
|------------------------------------|--|-------------------------------------|
| ☐ real time | ☐ several times daily | ☐ once daily |
| ☐ weekly | ☐ monthly | ☐ on demand |

Who would use the result? (roles/functions only)

Which languages should the solution support?

- | | | | |
|----------------------------------|----------------------------------|------------------------------------|--------------------------------|
| ☐ Serbian | ☐ English | ☐ Hungarian | ☐ other |
|----------------------------------|----------------------------------|------------------------------------|--------------------------------|

Is access required from a phone or remote computer?

- | | | | |
|--------------------------------|-----------------------------------|-------------------------------|--|
| ☐ phone | ☐ computer | ☐ both | ☐ not important |
|--------------------------------|-----------------------------------|-------------------------------|--|

Security and organisational framework

5 Security and constraints

Are there specific rules about where data may be processed?

- | | |
|---|---|
| ☐ processing must be local | ☐ cloud allowed with approval |
| ☐ not yet defined | ☐ other / internal review required |

Would read-only access be acceptable as the basic security model?

- | | | |
|------------------------------|-----------------------------|---|
| ☐ yes | ☐ no | ☐ internal approval required |
|------------------------------|-----------------------------|---|

Is a non-disclosure agreement (NDA) required before detailed analysis?

- | | | |
|------------------------------|-----------------------------|----------------------------------|
| ☐ yes | ☐ no | ☐ unknown |
|------------------------------|-----------------------------|----------------------------------|

Who approves access to systems or sample data? (role/function only, no name)

Are there technical or organisational constraints we should know before the meeting?

Reminder

- No access credentials or database copies are required at this stage.
- Technical access is considered only after agreement, authorisation and a defined scope.
- General information about processes and data types is sufficient for the initial assessment.

Priorities and next step

6 Priority and expectations

How important is solving this problem right now?

☐ critical / urgent ☐ high priority ☐ medium priority ☐ exploratory

When would you like the first useful result to be available?

☐ within 30 days ☐ 1-3 months ☐ 3-6 months ☐ not defined

Is there a budget framework for an initial assessment or pilot project?

☐ framework exists ☐ approval pending ☐ not defined

Who participates in the decision about the next step? (roles/functions only)

Which approximate time would suit you for a 30-45 minute meeting?

Additional note or question for

What happens after you submit the questionnaire?

1. We will review the answers and prepare targeted questions for the first meeting.
2. During the meeting, we will assess business value, data availability and realistic scope.
3. If there is a meaningful use case, we will propose a clearly defined initial assessment or small pilot.

Confidentiality and data protection

7 Notice on purpose and handling of information

- Information submitted through this questionnaire will be used solely for the initial assessment of business needs, preparation of the meeting and, where applicable, preparation of a proposal.
- will not use the submitted information for other purposes or disclose it to third parties, except with the client's prior consent or where disclosure is required by law.
- Clients are not asked to provide passwords, access credentials, database extracts, employee, customer or business-partner data, financial data, or any other confidential or sensitive information.
- Information will be retained only for as long as necessary to process the enquiry and prepare possible cooperation, using reasonable organisational and technical safeguards.
- The client may request correction or deletion of submitted information, except where retention is required by law.
- This notice is an informational framework for the initial contact and does not replace an NDA, confidentiality agreement, data-processing agreement or a separate privacy notice where such documents are required.

Client confirmation

- ☐ I confirm that I understand the purpose of processing and that I have not entered confidential, sensitive or access-credential information in this questionnaire.

Note: Before full business use, legal review is recommended in relation to the company's specific status, legal basis for processing and retention period.