

CLIENT NEEDS ANALYSIS
Client Information

ORGANIZATION NAME		CONTACT NAME	
ADDRESS	CITY	STATE	ZIP
PHONE	EMAIL	<input type="checkbox"/> Home User <input type="checkbox"/> Business User	

Existing Documentation

<input type="checkbox"/> IT Handbook	<input type="checkbox"/> Licenses	<input type="checkbox"/> Install Disks	<input type="checkbox"/> PCI-DSS \$ /YR	<input type="checkbox"/> GLBA (Fin. Inst.)
<input type="checkbox"/> Password List	<input type="checkbox"/> Product Keys	<input type="checkbox"/> Manuals	<input type="checkbox"/> HIPAA (Health)	<input type="checkbox"/> SOX (Public Co.)
<input type="checkbox"/> Distaster Plan	<input type="checkbox"/> Procedures	<input type="checkbox"/> All Up To Date?	<input type="checkbox"/> FISMA (Gov. Agcy.)	<input type="checkbox"/> Other:

Compliance

Recent Bills (Attach) ☐ ISP ☐ Cable ☐ Phone ☐ Security ☐ Domain Host ☐ Web Host ☐ Other:

Asset Overview

(Attach additional forms CNA-PS, CNS-VS, etc.)

PHYSICAL SERVERS	LAPTOPS	PRINTERS	MULTIFUNCTION 1
			<input type="checkbox"/> Copy <input type="checkbox"/> Print <input type="checkbox"/> Fax <input type="checkbox"/> Email <input type="checkbox"/> Wireless
VIRTUAL SERVERS	TABLETS	FAX	MULTIFUNCTION 2
			<input type="checkbox"/> Copy <input type="checkbox"/> Print <input type="checkbox"/> Fax <input type="checkbox"/> Email <input type="checkbox"/> Wireless
DESKTOPS	SMARTPHONES	COPIERS	MULTIFUNCTION 3
			<input type="checkbox"/> Copy <input type="checkbox"/> Print <input type="checkbox"/> Fax <input type="checkbox"/> Email <input type="checkbox"/> Wireless

Special Users (Employees / Kids)

Monitoring System: ☐ Web ☐ URLs ☐ Searches ☐ Apps ☐ Time ☐ Screenshots

Web Filtering System: ☐ Social Media ☐ Porn ☐ Malware ☐ Per Machine ☐ Per User

Applications

<input type="checkbox"/> Word <input type="checkbox"/> Excel <input type="checkbox"/> Powerpoint <input type="checkbox"/> Outlook <input type="checkbox"/> OneNote	<input type="checkbox"/> Quickbooks Desktop <input type="checkbox"/> QB Online
<input type="checkbox"/> Access <input type="checkbox"/> Office 365 <input type="checkbox"/> Sharepoint <input type="checkbox"/> Skype <input type="checkbox"/> Publisher	Adobe: <input type="checkbox"/> Acrobat Pro <input type="checkbox"/> Other:
Other Office: OpenOffice.org / Google Apps / LibreOffice	Exchange: <input type="checkbox"/> Hosted <input type="checkbox"/> Onsite <input type="checkbox"/> O365

INDUSTRY-SPECIFIC APPS

CUSTOM APPS / CODE

Cloud Storage

☐ Amazon AWS ☐ Dropbox Free ☐ Dropbox Pro ☐ Dropbox For Business ☐ Box ☐ Carbonite ☐ Crashplan
☐ Google Drive ☐ Flickr ☐ Other:

Internet Service Provider(s)

ISP 1: <input type="checkbox"/> Cable <input type="checkbox"/> DSL <input type="checkbox"/> T1 <input type="checkbox"/> 4G <input type="checkbox"/> Fiber <input type="checkbox"/> Other:		SPEED	STATIC IPs
ISP 2: <input type="checkbox"/> Cable <input type="checkbox"/> DSL <input type="checkbox"/> T1 <input type="checkbox"/> 4G <input type="checkbox"/> Fiber <input type="checkbox"/> Other:		SPEED	STATIC IPs
MODEM	ROUTER	____Ports <input type="checkbox"/> Wireless <input type="checkbox"/> Guest Network	
ISSUES			

Email

DOMAIN 1	<input type="checkbox"/> In-House <input type="checkbox"/> Hosted By:	<input type="checkbox"/> Pop <input type="checkbox"/> IMAP <input type="checkbox"/> Email Client:
DOMAIN 2	<input type="checkbox"/> In-House <input type="checkbox"/> Hosted By:	<input type="checkbox"/> Pop <input type="checkbox"/> IMAP <input type="checkbox"/> Email Client:
DOMAIN 3	<input type="checkbox"/> In-House <input type="checkbox"/> Hosted By:	<input type="checkbox"/> Pop <input type="checkbox"/> IMAP <input type="checkbox"/> Email Client:
<input type="checkbox"/> Email Virus Scanner <input type="checkbox"/> Spam Blocker Other <input type="checkbox"/> Encrypted Email <input type="checkbox"/> Other Features:		
ISSUES		

Backups

DRIVE	FOLDER(S)	<input type="checkbox"/> Daily <input type="checkbox"/> Weekly	____GB <input type="checkbox"/> Pictures <input type="checkbox"/> Audio <input type="checkbox"/> Video
DRIVE	FOLDER(S)	<input type="checkbox"/> Daily <input type="checkbox"/> Weekly	____GB <input type="checkbox"/> Pictures <input type="checkbox"/> Audio <input type="checkbox"/> Video
DRIVE	FOLDER(S)	<input type="checkbox"/> Daily <input type="checkbox"/> Weekly	____GB <input type="checkbox"/> Pictures <input type="checkbox"/> Audio <input type="checkbox"/> Video
DRIVE	FOLDER(S)	<input type="checkbox"/> Daily <input type="checkbox"/> Weekly	____GB <input type="checkbox"/> Pictures <input type="checkbox"/> Audio <input type="checkbox"/> Video
DRIVE	FOLDER(S)	<input type="checkbox"/> Daily <input type="checkbox"/> Weekly	____GB <input type="checkbox"/> Pictures <input type="checkbox"/> Audio <input type="checkbox"/> Video
<input type="checkbox"/> Backups Tested? <input type="checkbox"/> Offsite Location:		<input type="checkbox"/> Non-Proprietary? Responsible Person:	
ISSUES			

NAS (Network Attached Storage)

MODEL	____GB <input type="checkbox"/> RAID 1 2 3 4 5 6
ISSUES	

Subnets

NAME	CIDR	GW	DNS1	DNS2
DHCP	SCOPE	SPEED	<input type="checkbox"/> Wired <input type="checkbox"/> Plenum (<input type="checkbox"/> N/A) <input type="checkbox"/> Wireless SSID: PW:	
NAME	CIDR	GW	DNS1	DNS2
DHCP	SCOPE	SPEED	<input type="checkbox"/> Wired <input type="checkbox"/> Plenum (<input type="checkbox"/> N/A) <input type="checkbox"/> Wireless SSID: PW:	
NAME	CIDR	GW	DNS1	DNS2
DHCP	SCOPE	SPEED	<input type="checkbox"/> Wired <input type="checkbox"/> Plenum (<input type="checkbox"/> N/A) <input type="checkbox"/> Wireless SSID: PW:	
NAME	CIDR	GW	DNS1	DNS2
DHCP	SCOPE	SPEED	<input type="checkbox"/> Wired <input type="checkbox"/> Plenum (<input type="checkbox"/> N/A) <input type="checkbox"/> Wireless SSID: PW:	
NAME	CIDR	GW	DNS1	DNS2
DHCP	SCOPE	SPEED	<input type="checkbox"/> Wired <input type="checkbox"/> Plenum (<input type="checkbox"/> N/A) <input type="checkbox"/> Wireless SSID: PW:	
ISSUES				

Wireless Access Points (AP Mode)

MODEL	LOCATION	SSID	PW	<input type="checkbox"/> Open <input type="checkbox"/> WEP <input type="checkbox"/> WPA <input type="checkbox"/> WPA2
MODEL	LOCATION	SSID	PW	<input type="checkbox"/> Open <input type="checkbox"/> WEP <input type="checkbox"/> WPA <input type="checkbox"/> WPA2
MODEL	LOCATION	SSID	PW	<input type="checkbox"/> Open <input type="checkbox"/> WEP <input type="checkbox"/> WPA <input type="checkbox"/> WPA2
MODEL	LOCATION	SSID	PW	<input type="checkbox"/> Open <input type="checkbox"/> WEP <input type="checkbox"/> WPA <input type="checkbox"/> WPA2

☐ Roaming System ☐ Captive Portal ☐ Guest Network ☐ Separate LANs ☐ Site Survey

ISSUES

Firewall

HARDWARE	SOFTWARE	<input type="checkbox"/> Remote Access: <input type="checkbox"/> VPN <input type="checkbox"/> Other:	
RULES		<input type="checkbox"/> Port Forwarding:	<input type="checkbox"/> DMZ:
ISSUES			

Antivirus/Anti-malware

SOFTWARE	UPDATES	EXPIRES	<input type="checkbox"/> Central Management:
ISSUES			

Updates / Patch Management

☐ Automatic Windows Updates ☐ Microsoft Updates ☐ Non-Microsoft Patches

ISSUES

Password Management

☐ Unique? ☐ Strong? ☐ Shared? ☐ User Accounts? ☐ Kiosks? ☐ Domain ☐ Auto-Lock (Workstations)

ISSUES

Phone System

MODEL	LINES	EXTENSIONS	VENDOR	AGE
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☐ POTS ☐ VOIP ☐ PBX ☐ Virtual PBX ☐ Cloud PBX ☐ Auto Attendant ☐ Custom Messages / Music

ISSUES

Security Cameras

MODEL	QTY	<input type="checkbox"/> IP <input type="checkbox"/> Coax. <input type="checkbox"/> Wireless <input type="checkbox"/> Other:
DVR	HD1:___GB HD2: ___GB <input type="checkbox"/> Onsite View <input type="checkbox"/> Offsite View	
ISSUES		

Digital Imaging

STILL	VIDEO	WEBCAMS	SCANNERS	OTHER
ISSUES				

Websites

URL	HOST	COST	BUILT BY
MAINT. BY	<input type="checkbox"/> Static <input type="checkbox"/> Drupal <input type="checkbox"/> Wordpress <input type="checkbox"/> Other:		<input type="checkbox"/> SEO <input type="checkbox"/> Mobile Friendly
URL	HOST	COST	BUILT BY
MAINT. BY	<input type="checkbox"/> Static <input type="checkbox"/> Drupal <input type="checkbox"/> Wordpress <input type="checkbox"/> Other:		<input type="checkbox"/> SEO <input type="checkbox"/> Mobile Friendly
URL	HOST	COST	BUILT BY
MAINT. BY	<input type="checkbox"/> Static <input type="checkbox"/> Drupal <input type="checkbox"/> Wordpress <input type="checkbox"/> Other:		<input type="checkbox"/> SEO <input type="checkbox"/> Mobile Friendly
ISSUES			

Domain Names

NAME	HOST	COST	<input type="checkbox"/> Live Site
NAME	HOST	COST	<input type="checkbox"/> Live Site
NAME	HOST	COST	<input type="checkbox"/> Live Site
ISSUES			

Social Media & Marketing

FACEBOOK	MAINT. BY	<input type="checkbox"/> Updated Regularly
TWITTER	MAINT. BY	<input type="checkbox"/> Updated Regularly
YOUTUBE	MAINT. BY	<input type="checkbox"/> Updated Regularly
BLOG	MAINT. BY	<input type="checkbox"/> Updated Regularly
GOOGLE "MY BUSINESS"	MAINT. BY	<input type="checkbox"/> Interior Photos
ADWORDS	MAINT. BY	<input type="checkbox"/> Updated Regularly
E-NEWSLETTER	MAINT. BY	<input type="checkbox"/> Updated Regularly
OTHER	MAINT. BY	<input type="checkbox"/> Updated Regularly
OTHER	MAINT. BY	<input type="checkbox"/> Updated Regularly
ISSUES		

Other Hardware

EXTERNAL HARD DRIVES

POS

4G ADAPTERS

OTHER

ISSUES

Power

UPSs IN USE

POWER LOSS FREQUENCY

☐ Grounding Tested

ISSUES

Continuity

SPARE WORKSTATIONS

SPARE HARDWARE

DRIVE IMAGES

OTHER

☐ Disaster Plan

ISSUES

Past Year Maintenance

<input type="checkbox"/> Interior Cleaning of Computers	<input type="checkbox"/> Software Up To Date	OTHER
<input type="checkbox"/> IT Handbook Updated	<input type="checkbox"/> Firewall Tested	
<input type="checkbox"/> Operating Systems Up To Date	<input type="checkbox"/> HD Health Check	
<input type="checkbox"/> Virus Software Up To Date	<input type="checkbox"/> HD Space Check	
<input type="checkbox"/> Virus Definitions Up To Date	<input type="checkbox"/> HD Defrag.	
<input type="checkbox"/> Virus Scans	<input type="checkbox"/> Backup Check	
<input type="checkbox"/> Successful Fire Inspection	<input type="checkbox"/> Registry Cleanup	

ISSUES

Additional IT Personel (Past & Present)

NAME	ROLE	
CONTACT INFO		<input type="checkbox"/> AVAILABLE
NAME	ROLE	
CONTACT INFO		<input type="checkbox"/> AVAILABLE
NAME	ROLE	
CONTACT INFO		<input type="checkbox"/> AVAILABLE

Complaints / Frustration / Pain Points

<input type="checkbox"/> Internet Slow	<input type="checkbox"/> Viruses/Malware	<input type="checkbox"/> Error Messages	<input type="checkbox"/> Cost:
<input type="checkbox"/> Computers Slow	<input type="checkbox"/> Insufficient Storage	<input type="checkbox"/> Other:	
<input type="checkbox"/> Programs Crash	<input type="checkbox"/> Managing Backups	<input type="checkbox"/> Other:	

Business / Technology Objectives

Billing Preferences

<input type="checkbox"/> Managed Services (Flat Fee):	<input type="checkbox"/> Credit Card	<input type="checkbox"/> Paypal
<input type="checkbox"/> Hourly Per Issue:	<input type="checkbox"/> Invoice	<input type="checkbox"/> Cash
<input type="checkbox"/> Discounted Prepaid Tickets:	<input type="checkbox"/> Other:	

Other Issues

Credit References

NAME	ADDRESS			PHONE
EMAIL	TERMS	LAST TRADE	ANNUAL VOLUME	
NAME	ADDRESS			PHONE
EMAIL	TERMS	LAST TRADE	ANNUAL VOLUME	
NAME	ADDRESS			PHONE
EMAIL	TERMS	LAST TRADE	ANNUAL VOLUME	
May we contact your bank? <input type="checkbox"/> Yes <input type="checkbox"/> No		BANK	BRANCH	ACT. NAME

Credit Check Authorization

Authorization is hereby granted by _____ to Pfeifer Media Group Inc DBA PMG Technology Solutions ("PMG-Tech") to obtain a standard factual data credit report through a credit reporting agency chosen by PMG-Tech, including but not limited to the following information concerning _____: bank account balances, outstanding credit accounts, mortgages, loans, and credit cards. Authorization is further granted to the reporting agency to use an electronic reproduction of this authorization if necessary to obtain any information regarding the above information.

NAME	SIGNATURE	DATE

Notes
