START HERE GUIDE

CLIENT-001

Purpose. This guide helps prospective clients identify the correct Arcleron forms, prepare the right records, and understand what happens before an engagement begins.

Important
Submitting a form does not create a consulting relationship, guarantee acceptance, authorize work, or replace a signed Consulting Services Agreement and applicable Statement of Work.

THE ARCLERON CLIENT PATH

1. Select the need
Identify the service area and desired business outcome.

2. Complete intake
Provide business identity, authorized contacts, and a clear summary of the need.

3. Prepare records
Use the document checklist. Do not send passwords, payment-card data, or unnecessary regulated information.

4. Arcleron review
Arcleron evaluates fit, scope, risk, timing, and any confidentiality requirements.

5. Scope and agreement
If accepted, Arcleron prepares the Consulting Services Agreement and Statement of Work.

6. Begin work
Work begins only after required signatures, approvals, access arrangements, and payment terms are complete.

WHICH FORMS SHOULD I USE?

Every prospective client: New Client Intake Form, Project / Account Service Request, Required Document Checklist, Information Handling & Submission Notice, and Next Steps & Readiness Checklist.

Efficiency or cost-control engagements: Also complete the Efficiency & Cost-Control Assessment.

Confidential discussions before scoping: Complete the Mutual NDA Request Form. Arcleron will determine whether a separate NDA is appropriate and prepare the controlled document.

After intake: Arcleron prepares the Consulting Services Agreement and any Statement of Work. A blank agreement is not part of the public starter package.