

NEXT STEPS & READINESS CHECKLIST

CLIENT-008

Use this checklist before requesting that Arcleron schedule work. Arcleron will confirm the final requirements for each engagement.

CLIENT READINESS

Required for initial review

- ☐ New Client Intake Form complete
- ☐ Project / Account Service Request complete
- ☐ Relevant assessment complete
- ☐ Document Checklist reviewed
- ☐ Information Handling Notice acknowledged
- ☐ Authorized decision-maker identified
- ☐ Material deadlines disclosed
- ☐ Conflicts or special risks disclosed

BEFORE WORK BEGINS

Complete when requested by Arcleron

- ☐ Mutual NDA executed if required
- ☐ Consulting Services Agreement executed
- ☐ Statement of Work executed
- ☐ Scope and exclusions confirmed
- ☐ Deliverables and acceptance criteria confirmed
- ☐ Fees and payment terms approved
- ☐ Required access method approved
- ☐ Client responsibilities assigned
- ☐ Kickoff participants identified
- ☐ Start date authorized

SUBMISSION RECORD

NEXT STEPS & READINESS CHECKLIST - CONTINUED

CLIENT-008

Organization name *

Submitting representative *

Title / role *

Business email *

Submission date *

Forms and attachments included

Open items, questions, or requested follow-up

Next step

Arcleron will review the submitted materials and respond with questions, a decline, a request for safeguards or additional records, or proposed agreement and scope documents. Do not begin work or rely on an engagement start date until Arcleron confirms it in writing.

NEXT STEPS & READINESS CHECKLIST - CONTINUED CLIENT-008

CERTIFICATION AND SIGNATURE

I certify that the information provided in this form is accurate to the best of my knowledge and that I am authorized to submit it for the organization identified. This signature confirms submission only; it does not create a consulting relationship, authorize work, or execute a separate NDA, Consulting Services Agreement, or Statement of Work.

Choose one signature method

☐ Handwritten signature☐ Electronic signature

Optional electronic signature

If I select Electronic signature and type or draw my name in the signature field below, I agree to conduct this submission electronically and intend that mark to serve as my electronic signature. I may instead print and sign by hand. A copy of the completed form should be retained for my records.

Printed legal name *

Title / role *

Signature - handwritten or adopted electronic signature *

Date signed *

Business email *