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.

NEW CLIENT INTAKE FORM

CLIENT-002

Complete this form for the organization requesting Arcleron services. Fields marked with an asterisk are required for initial review.

ORGANIZATION IDENTITY

Legal business or organization name *

DBA / trade name

Entity type

State / country of formation

Year established

Principal business address *

Website and primary industry

PRIMARY CONTACT AND AUTHORITY

Primary contact name *

Title / role *

Business email *

Business phone *

Contact authority

- ☐ Owner / member
- ☐ Officer / executive
- ☐ Authorized manager
- ☐ Project lead
- ☐ Other

Who has final authority to approve scope, fees, access, and agreements? *

BUSINESS PROFILE

NEW CLIENT INTAKE FORM - CONTINUED

CLIENT-002

Approximate organization size

- [ ] 1-5 employees
- [ ] 6-25
- [ ] 26-100
- [ ] 101-500
- [ ] 500+
- [ ] Not applicable

Products, services, customers, and operating locations

Current priorities, constraints, or events driving this request *

Existing advisers, vendors, internal teams, or stakeholders Arcleron may need to coordinate with

ENGAGEMENT FIT AND RISK SCREENING

Requested service areas

- [ ] Business & management consulting
- [ ] Research & market entry
- [ ] Sourcing & supplier development
- [ ] Efficiency, cost control & performance
- [ ] Technology & business systems
- [ ] Operations & process design
- [ ] Venture / subsidiary oversight
- [ ] Other

Does the matter involve any of the following?

- [ ] Personal or regulated data
- [ ] System or account access
- [ ] Employee records
- [ ] Financial records
- [ ] Contracts / rate cards
- [ ] Cross-border activity
- [ ] Pending dispute or claim
- [ ] None known

NEW CLIENT INTAKE FORM - CONTINUED

CLIENT-002

Explain any selected risk area, deadline, conflict, or sensitivity

How did you learn about Arcleron?

CERTIFICATION AND SIGNATURE

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Choose one signature method

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- ☐ Electronic signature

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Printed legal name *

Title / role *

Signature - handwritten or adopted electronic signature *

Date signed *

Business email *

PROJECT / ACCOUNT SERVICE REQUEST

CLIENT-003

Use this form to describe one proposed project, account, or business objective. Arcleron will use it to evaluate fit and prepare a possible scope of work.

REQUEST IDENTIFICATION

Organization legal name *

Engagement / project name *

Business unit / account *

Requested start date

Target completion / decision date

Primary objective - what should be different when the work is complete? *

CURRENT STATE AND SCOPE

Current process, condition, challenge, or opportunity *

Requested work or questions Arcleron should address *

Known deliverables or outputs requested

PROJECT / ACCOUNT SERVICE REQUEST - CONTINUED

CLIENT-003

Items expressly outside the requested scope

PEOPLE, SYSTEMS, AND MEASURES

Key stakeholders, departments, locations, customers, suppliers, or accounts affected

Systems, applications, equipment, files, or records involved

How success should be measured - quality, time, cost, capacity, revenue, risk, or other results

Known budget range, approval process, or commercial constraint

DEPENDENCIES AND ACCEPTANCE

Client responsibilities, required access, decisions, or third-party dependencies

Proposed acceptance criteria or completion standard

PROJECT / ACCOUNT SERVICE REQUEST - CONTINUED

CLIENT-003

Additional notes or attachments

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EFFICIENCY & COST-CONTROL ASSESSMENT

CLIENT-004

This assessment helps Arcleron identify where time, cost, quality, accountability, capacity, and revenue may be affected. It is a screening tool, not a guarantee of savings or performance improvement.

ASSESSMENT SCOPE

Organization / account / project *

Primary review level

- ☐ Project
- ☐ Customer account
- ☐ Department
- ☐ Location / facility
- ☐ Organization-wide
- ☐ Employee / role group

Process or activity to be reviewed *

Why is the review needed now?

BASELINE PERFORMANCE

Current volume, workload, transactions, service calls, tickets, orders, or output

Current labor, material, vendor, equipment, rework, delay, or overhead costs known

Current cycle time, backlog, turnaround, response time, or schedule performance

EFFICIENCY & COST-CONTROL ASSESSMENT - CONTINUED

CLIENT-004

Current quality, error, return, warranty, complaint, or rework indicators

WORKFLOW AND COST-CONTROL REVIEW

Observed concerns

- ☐ Duplicate work
- ☐ Waiting / approval delays
- ☐ Missed billing / revenue
- ☐ Material waste / loss
- ☐ Inventory issues
- ☐ Documentation gaps
- ☐ Manual re-entry
- ☐ Unclear ownership
- ☐ Overtime or staffing imbalance
- ☐ Vendor or freight cost
- ☐ Quality / rework
- ☐ Training or consistency

Describe the most significant bottlenecks, waste, missed opportunities, or control gaps

Contracts, rate cards, policies, targets, or standards that govern the work

EMPLOYEE AND ROLE-LEVEL FACTORS

Fair-use principle
Employee-level analysis should focus on documented work, role expectations, process conditions, training, workload, quality, and verifiable outcomes. It should not be used as the sole basis for employment decisions or unlawful discrimination.

EFFICIENCY & COST-CONTROL ASSESSMENT - CONTINUED

CLIENT-004

Roles or teams included - do not provide unnecessary sensitive personal information

Expected duties, productivity standards, quality requirements, and authorized work

Training, tools, supervision, staffing, scheduling, or process conditions affecting performance

Available records: time tickets, work orders, repair orders, billing records, QA checks, schedules, or other evidence

DESIRED OUTCOMES

Priority outcomes

- ☐ Lower avoidable cost
- ☐ Faster cycle time
- ☐ Improved quality
- ☐ Better billing capture
- ☐ Higher capacity
- ☐ Clearer accountability
- ☐ Consistent documentation
- ☐ Reduced operational risk
- ☐ Improved customer experience
- ☐ Responsible growth

Desired result, target, or decision to support

EFFICIENCY & COST-CONTROL ASSESSMENT - CONTINUED

CLIENT-004

Known constraints or changes that cannot be made

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Date signed *

Business email *

REQUIRED DOCUMENT CHECKLIST

CLIENT-005

Provide only records that are relevant and authorized for the proposed engagement. Arcleron may request additional items after reviewing the scope.

Do not submit
Passwords, recovery codes, full payment-card numbers, private encryption keys, unnecessary Social Security numbers, or regulated data through ordinary email or unapproved file-sharing methods.

BUSINESS AND AUTHORITY RECORDS

Available items

- ☐ Entity / DBA information
- ☐ Authorized contact list
- ☐ Organization chart
- ☐ Current business plan or objectives
- ☐ Relevant licenses / permits
- ☐ Insurance requirements
- ☐ Prior assessments or reports
- ☐ Other authority records

PROJECT AND OPERATING RECORDS

Available items

- ☐ Process maps / SOPs
- ☐ Policies / work instructions
- ☐ Contracts / statements of work
- ☐ Rate cards / pricing schedules
- ☐ Time tickets / work orders
- ☐ Repair orders / service records
- ☐ Invoices / billing samples
- ☐ Quality / error / rework records
- ☐ Schedules / staffing data
- ☐ Inventory / purchasing records
- ☐ Supplier / vendor information
- ☐ System reports / screenshots

FINANCIAL AND PERFORMANCE RECORDS

Available items

- ☐ Budget or approved cost range
- ☐ Cost summaries
- ☐ Revenue / billing reports
- ☐ Productivity or capacity data
- ☐ KPI / scorecard reports
- ☐ Freight / shipping costs
- ☐ Warranty / return data
- ☐ Customer complaint data

REQUIRED DOCUMENT CHECKLIST - CONTINUED

CLIENT-005

List the records you expect to provide and the date range covered

Identify any records that require special handling, redaction, approval, or a secure transfer method

Records not available and why

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INFORMATION HANDLING & SUBMISSION NOTICE

CLIENT-006

This notice establishes safe intake expectations before a formal engagement and detailed data-handling plan are in place.

PERMITTED STARTER-PACKAGE INFORMATION

Business identity and contact information; general project descriptions; non-sensitive objectives, workflows, document categories, deadlines, and known constraints; and redacted samples reasonably necessary for initial review.

RESTRICTED INFORMATION

Do not place passwords, multi-factor codes, recovery codes, private keys, full payment-card data, unnecessary government identifiers, medical information, regulated personal data, or production-system credentials in these forms or ordinary email.

Do not provide confidential information belonging to another party unless your organization is authorized to share it for the proposed purpose. Redact information that is not needed for initial review.

SUBMISSION AND ACCESS CONTROLS

Use only the submission method identified by Arcleron. If the matter requires sensitive files or system access, Arcleron and the client will first define an appropriate secure-transfer or controlled-access method. Client remains responsible for authorizing access, maintaining backups, and controlling administrator permissions.

Submission does not obligate Arcleron to accept the engagement. Arcleron may decline, request clarification, require an NDA, limit access, or require additional safeguards before receiving or reviewing information.

CLIENT ACKNOWLEDGEMENT

Please acknowledge

- ☐ I reviewed this notice
- ☐ I will not submit prohibited credentials or payment-card data
- ☐ I am authorized to provide the information submitted
- ☐ I will follow Arcleron submission instructions

Authorized representative name *

Title / role *

Date *

Business email *

INFORMATION HANDLING & SUBMISSION NOTICE - CONTINU

CLIENT-006

Special handling questions or concerns

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MUTUAL NDA REQUEST FORM

CLIENT-007

Use this request when confidential discussions may be needed before the engagement scope is finalized. This form is not an NDA. Arcleron will review the request and prepare or negotiate the controlled Mutual NDA when appropriate.

REQUESTING PARTY

Full legal name of requesting organization *

Entity type

Formation jurisdiction

Notice / business address

Authorized representative *

Title *

Business email *

Business phone *

PURPOSE AND INFORMATION

Purpose of the confidential discussions *

Categories of confidential information each party may disclose

Expected recipients or advisers who may need access

MUTUAL NDA REQUEST FORM - CONTINUED

CLIENT-007

Requested confidentiality period

Requested effective date

SPECIAL TERMS AND REVIEW FLAGS

Does the request involve any of the following?

- ☐ Foreign party or cross-border activity
- ☐ Personal or regulated data
- ☐ Source code / security information
- ☐ Trade secrets / product development
- ☐ Customer or supplier information
- ☐ Employee information
- ☐ Pending transaction or dispute
- ☐ None known

Requested governing law, venue, special return/destruction terms, or other requirements

Other party NDA proposed? If yes, identify it and provide it separately for review

MUTUAL NDA REQUEST FORM - CONTINUED

CLIENT-007

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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

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