VertexIO Client Discovery Questionnaire

A 12-question rubric for evaluating engagement fit

Axes:	3 — Business Objectives · Tech Pain Points · Growth Stage
Questions:	12 — four per axis (closed-form, 0/1/3 scoring)
Score range:	0 to 108 (36 per axis, weight 3 each)
Q1. [Objectives]:	How clearly can your leadership team articulate the next 12-month technology outcome that drives revenue? (0 pts) Vague — no shared narrative. (1 pts) Documented, but not widely understood. (3 pts) Clear, measurable, and shared across the executive team. (3 pts) Clear, cascaded into team OKRs with quarterly checkpoints.
Q2. [Objectives]:	Which of the following best describes the primary business objective for the next two quarters? (0 pts) Survive — runway is the only thing that matters. (1 pts) Stabilize — fix what is breaking before adding anything new. (3 pts) Grow — ship a new product line, expand into a new segment, or scale revenue. (3 pts) Compound — increase efficiency, margin, or platform leverage on top of a proven business.
Q3. [Objectives]:	How tied to revenue (directly or via retention) is the technology problem you want solved? (0 pts) Loosely — it is nice to have if time allows. (1 pts) Indirect — better tooling would help us ship faster. (3 pts) Direct — a measurable revenue line or churn driver is on the line. (3 pts) Severe — losses in the last quarter were traced to this gap.
Q4. [Objectives]:	Is there executive sponsorship (CEO, CTO, COO, Board) for committing budget to this initiative? (0 pts) No — this is exploratory. (1 pts) Soft support — we have talked about it, no commitment yet. (3 pts) Yes — one executive is the named champion with budget reserved. (3 pts) Yes — multiple executives are aligned and budget is pre-approved.
Q5. [Pain]:	How is the current tech pain documented? (0 pts) It is a feeling — nothing is written down. (1 pts) Slack threads, a doc, or a stale ticket — informal. (3 pts) A formal post-mortem, incident review, or audit with timestamps and impact numbers. (3 pts) Quantified — we have a cost-of-inaction estimate with named owners.
Q6. [Pain]:	How acute is the pain today (ship-blocking incidents, customer SLAs, lost deals)? (0 pts) Acute only in hindsight — no current pressure. (1 pts) Occasional — at least one shipped deadline slipped because of it. (3 pts) Weekly — engineers or customers hit it on a recurring cadence. (3 pts) Daily — it is consuming eng leadership bandwidth right now.
Q7. [Pain]:	What is the realistic 6-month outcome if VertexIO does NOT get engaged (status quo)? (0 pts) Roughly the same — tolerable. (1 pts) Slowly worse — we will keep absorbing the cost. (3 pts) Noticeably worse — a key hire or roadmap slips, and the gap compounds. (3 pts) Existential — a contract renewal, audit, or funding milestone is at risk.
Q8. [Pain]:	How much in-house engineering capacity can be redirected to the work VertexIO proposes? (0 pts) None — we are fully booked or below critical mass. (1 pts) A few hours a week, owned by a single engineer. (3 pts) A small team (2-4) with a tech lead, dedicated part-time. (3 pts) A dedicated squad or fractional engineering lead — bandwidth is reserved.
Q9. [Growth]:	What is the company’s current funding or revenue trajectory? (0 pts) Pre-seed / pre-revenue. (1 pts) Seed, generating early revenue but not yet default-alive. (3 pts) Series A-B, $1M-$10M ARR, growing 50%+ YoY. (3 pts) Series C+, $10M+ ARR, or bootstrapped with strong gross margin.
Q10. [Growth]:	How is engineering leadership structured? (0 pts) No CTO or technical leader yet. (1 pts) A founding technical generalist wearing many hats. (3 pts) A CTO plus at least one engineering manager / staff engineer. (3 pts) CTO, VP Eng, and staffed managers — clear decision-making authority.
Q11. [Growth]:	What is the size and shape of the engineering team today? (0 pts) 0-2 engineers

(founder-led). (1 pts) 3-6 engineers, cross-functional but small. (3 pts) 7-20 engineers, with at least one squad owning a product surface. (3 pts) 20+ engineers, multiple squads, established on-call and review culture.

Q12. [Growth]: How mature is the company's decision-making process for outside help? (0 pts) Ad-hoc — whoever raises the budget decides. (1 pts) Reactive — we would engage if the right partner landed. (3 pts) Defined — we have a written criteria or RFP we share with partners. (3 pts) Procurement-ready — sourcing, security review, and budget workflow are in place.

Scoring rubric:
strong_fit = total >= 72 (about 2/3 of 108)
scoped_engagement = total >= 48 (about 1/3 of 108)
refer_out = otherwise

Per-axis breakdown lets prospects and VertexIO see where a submission lands. Together they reason about whether the bottleneck is objectives, pain, or growth stage — and which kind of engagement is the right next step (fractional CTO, embedded pod, or audit).

Use the printable copy to interview leads on a call, or submit through the live web form for an automatic score.