OWNER'S CLINIC FOLLOW-UP

Pre-assessment *self-check*

Fill this out before a discovery visit. It helps us listen to your operation first. Your answers stay with Prairie Liberty Forge AI. Do not write client payment details, account numbers, or card numbers on this form.

1. Data

Where do your records live today?

- ☐ On our own machines or a server we own
- ☐ In vendor clouds we log into
- ☐ A mix of both
- ☐ I am not sure

Which records must never leave your custody? (customer files, payroll, student or patient records, and so on)

Do you know whether any of your current tools train on your chats or files?

- ☐ Yes, and we have turned that off where we can
- ☐ Yes, and it is still on
- ☐ No, we have not checked

2. Tools

List the main tools you pay for or rely on (email, files, accounting, CRM, AI, and others).

Which of those hold customer or operational data?

Which tools feel hard to leave, or hold records you could not recover if the vendor vanished?

3. People

Who will use AI first, and for what kind of work?

Who approves a draft before it leaves the building (a price, a promise, a posting, or a payment)?

Who owns permissions today (an owner, office manager, or IT)?

4. Permissions

Who can see which shared files today?

- ☐ A small named group per folder
- ☐ Most of the team can open most files
- ☐ We have “everyone” or broad sharing we have not reviewed
- ☐ I am not sure

Are HR, payroll, finance, or client files kept in their own place with a smaller group?

- ☐ Yes
- ☐ No, or only some of them
- ☐ I am not sure

When did you last review who has access?

Anything already overshared, or a tool (such as Copilot) that can see whatever a person can already open?

5. Goals

What job should get better first?

What would “better” look like in 90 days, in plain terms?

Any hard constraints we should treat as floor rules?

- ☐ Records must stay on our hardware
- ☐ No production-floor layoffs
- ☐ A person must approve before anything goes out
- ☐ Industry or school rules we have to meet

HOW THIS IS USED

Bring this to a discovery visit, or email it to zachary@liberty-forge.ai. It is a self-check, not a contract. Pricing is set per engagement by Zach. Assessment comes before any build.

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