



GRAYAREA SECURITY

Client Discovery Intake — Phase 1

Thanks for considering GrayArea Security. This short intake helps us make your first call focused and useful. It should take about 10 minutes. Answer what you can — blanks are fine. Save the completed PDF and email it to info@grayareasec.com before our scheduled call.

Your responses stay between you and us. We use them to prepare, not to prospect.

// 01 Company Snapshot

Company name

Primary contact — name & role

Email / phone

Industry or primary line of business

Number of employees

<10 10–25 26–50 50+

Primary locations (city/state, remote, hybrid)

// 02 IT & Security Environment

Who currently owns IT and security day-to-day?

In-house IT Managed Service Provider Part-time / shared No one formally

Approximate count of endpoints and servers you care about protecting

Where does most of your business data live?

On-prem Cloud (M365 / Google / AWS / etc.) Hybrid

Do you handle sensitive data? (PII, PHI, payment, customer records, IP)

A sentence or two is plenty.

Security tools already in place

e.g. EDR/antivirus, MDR, backup, MFA, email security, SIEM.

// 03 Compliance & Drivers

Working toward or maintaining any compliance framework?

- SOC 2 HIPAA PCI-DSS CMMC / NIST 800-171 ISO 27001 None / not sure

If "other" or multiple, list them here

What's driving this discovery conversation?

- Client or customer request Insurance requirement Internal initiative
 Recent event or near-miss Other

// 04 Current State

On a scale of 1–5, how confident are you in your current security posture?

- 1 — not confident 2 3 4 5 — very confident

What keeps you up at night about your company's security?

Any security incidents or close calls in the past 12 months?

- Yes No Prefer not to say

If comfortable, a brief note on what happened and how it was handled

// 05 Goals & Priorities

What would "meaningfully better security" look like for your business over the next 6–12 months?

Specific gaps you already know you want to close

e.g. asset visibility, patching cadence, awareness training, incident response plan.

Which best describes your budget situation?

- No budget allocated yet Small budget — high-impact priorities
 Defined budget — seeking best fit Flexible if ROI is clear

// 06 Engagement & Next Steps

What outcome would make the first call feel like a win for you?

Specific questions you'd like us to come prepared to discuss

Anyone else who should join the call? (name / role)

Best days and times to reach you

Save this completed PDF and return it to info@grayareasec.com. We'll review before our call and come prepared with focused recommendations.

grayareasec.com · Security tooling for the gray area.