TrueNorth Data Shield · Pre-engagement questionnaire

We use this only to scope your review; we never ask for passwords or patient data; see Privacy Policy: truenorthdatashield.com/privacy

Do not enter passwords, credentials, tenant IDs, admin names, health information (PHI) or client personal data.

Veteran-owned. Return the completed form to hello@truenorthdatashield.com. Our team replies within 1 business day.

1. Company name

2. Industry (check one)

- ☐ Legal
- ☐ Accounting / tax
- ☐ Healthcare / dental
- ☐ Financial services
- ☐ Insurance
- ☐ Real estate
- ☐ Construction / trades
- ☐ Nonprofit
- ☐ Professional services
- ☐ Retail / hospitality
- ☐ Manufacturing
- ☐ Other

3. Number of users

4. Microsoft 365 license level (check one)

- ☐ Business Basic
- ☐ Business Standard
- ☐ Business Premium
- ☐ E3
- ☐ E5
- ☐ Other or unsure

5. Microsoft 365 Copilot (check one)

- ☐ Deployed
- ☐ Planned
- ☐ No

6. External sharing (check one)

- ☐ Allowed with anyone
- ☐ Only signed-in guests
- ☐ Internal only
- ☐ Unsure

7. Guest users in your tenant (check one)

- ☐ Many (20+)
- ☐ Some (1-20)
- ☐ None
- ☐ Unsure

8. Which do you use? (check all that apply)

- ☐ SharePoint
- ☐ Teams
- ☐ OneDrive

9. Multi-factor authentication (MFA) (check one)

- ☐ Required for everyone
- ☐ Admins only
- ☐ Some users
- ☐ Not enabled
- ☐ Unsure

10. Who runs your Microsoft 365 tenant? (check one)

- ☐ In-house
- ☐ MSP / outside IT provider
- ☐ Both
- ☐ Unsure

11. Regulations that apply (check all that apply)

- ☐ HIPAA
- ☐ FTC Safeguards / GLBA
- ☐ IRS 4557
- ☐ ABA 1.6
- ☐ PCI
- ☐ Other
- ☐ None / unsure

12. Desired timeline (check one)

- ☐ As soon as possible
- ☐ Within 30 days
- ☐ 1-3 months
- ☐ Just researching

13. Preferred contact (check one)

- ☐ Email
- ☐ Email, plus an optional call

Service (check one)

- ☐ Readiness Review
- ☐ Monitor
- ☐ Renewal & Insurance Review

14. Contact name

15. Contact email

Short notes (optional). Do not enter passwords, health information (PHI) or client personal data.

The scan needs Microsoft 365. Not on Microsoft 365? You can still get the Renewal & Insurance Review.