



CLIENT GROWTH ASSESSMENT

Business Name: _____

Owner: _____

Business Address: _____

City: _____ Zip: _____

Primary Business Advisor: _____

Client ID: _____

Description of project: _____

NAICS Code: _____

Please indicate all financial impact and/or business milestones that resulted from SBDC assistance.

- | | | | |
|----------|---------------------------------|------------------------------|---------------------------------------|
| \$ _____ | SBA Loan _____ | | |
| \$ _____ | Commercial Loan _____ | [<input type="checkbox"/>] | Started my business on ____/____/____ |
| | Loan Officer _____ | [<input type="checkbox"/>] | Expanded my business |
| \$ _____ | Owner Investment | | |
| \$ _____ | Venture Capital | [<input type="checkbox"/>] | Current number of employees |
| \$ _____ | Prime Contract Award | | _____ Full-time |
| \$ _____ | Subcontract Award | | _____ Part-time |
| \$ _____ | Increased Sales or Exports | | |
| \$ _____ | Other (<i>describe</i>) _____ | [<input type="checkbox"/>] | Jobs retained/saved _____ |

Other Comments: _____

I grant permission for the Small Business Development Center (SBDC) and the U.S. Small Business Administration (SBA) to use this information for public information and educational purposes. I further grant permission to the above groups to use still photographs, audio and videotape and/or film of me, my business, and its employees for public information and educational purposes. I understand that SBDC uses such information to gain support for future program funding. *Check here [] if you do not want your specific information used publicly, but approve use of your data in summary reporting.*

Client Signature: _____

Date: _____

SBDC Business Advisor: _____

Date: _____

SBDC Director: _____

Date: _____

GROWTH PLAN

SBDC is a continued resource for your business. How can we assist with your future growth?

- | | |
|---|--|
| [<input type="checkbox"/>] Financing | [<input type="checkbox"/>] Financial Checkup |
| [<input type="checkbox"/>] Marketing | [<input type="checkbox"/>] International Trade |
| [<input type="checkbox"/>] Government Contracting | [<input type="checkbox"/>] Operational Checkup |
| [<input type="checkbox"/>] Employee/Growth Issues | |

Other Desired Growth:

MIS Definitions for Critical Impact Reporting Areas

All impact entered must be client-attributed and a direct result of SBDC assistance.

Category	Type of field	MIS Module	Definition
Business Started ^{(1) (4)}	Dollar Value	Milestones Enter \$0. <i>If there was a loan associated with the business start or expansion, enter the \$ amount under Investments.</i>	The pre-venture business now meets the SBA definition for existing business (See SOP) MIS counseling sessions must occur <u>before and after</u> the business start date. (Business are considered "Started" if at the previous session the client was not in business, and at a subsequent session was "in business")
Business Expansion ^{(1) (4)}			For existing businesses only, growth in the business such as capital or contracts acquired, increased sales, number of employees, additional location, new product line, etc,
Current Number of Employees ^(1,2)	Number	Milestones <i>"Change in FT Staff" and "Change in PT Staff" are used before entering the current employment level in "Jobs" field. "Initial jobs" brings forward MIS client profile data. The difference = jobs created.</i>	For newly started businesses, include "1" for each owner in addition to other employees. For existing businesses, enter the new employment level - including owner(s).
Jobs Retained/Saved ⁽²⁾			For existing businesses only, the number of existing employees (including the owner) who kept their jobs.
SBA Loan ^{(2) (3)}	Dollar Value	Investments <i>Watch the difference between "Approved" vs. "Requested"</i>	SBA guaranteed and direct (business disaster) loans that have been approved by SBA and disbursed by lender. This includes SBA-funded 7(a) and 504 term loans, microloans, and lines of credit for the startup or expansion of the business.
Commercial/Bank Loan ^{(2) (3)}	Dollar Value	Investments	Loans made to the business from a financial institution (bank, non-bank lender, credit union) for startup or expansion business. Includes non-SBA loans, microloans, and lines of credit.
Owner Investment ^{(2) (3)}	Dollar Value	Investments <i>If there is <u>also</u> a loan, do not enter "approved" until the loan is also disbursed or the money is actually injected.</i>	Includes the cash and/or market value of assets injected into the business start or expansion.
Sales Increase ^{(2) (3)}	Dollar Value	Milestones	For business starts, enter the projected annual sales amount. For business expansion, enter the projected increase in annual sales.
Prime Contract or Subcontract	Dollar Value	Awards	Enter the value of prime or subcontracts awarded.

⁽¹⁾ Outcomes count toward State-mandated goals

⁽²⁾ Activity reported to SBA

⁽³⁾ Also report any associated starts or expansions and jobs created or retained.

⁽⁴⁾ Also report employment level changes.

Forms lacking client signature will be accepted only as an exception, and with SWTXB SBDC concurrence. Give clear evidence of the case's economic impact and a reason for the client's inability to provide a signature. Other important impact areas include but are not limited to business plans, feasibility analysis, cost savings, improved management ability, and:

Category	Type of field	MIS	Definition
Other federal loan	Dollar	Investment	Non-SBA federally guaranteed or direct loans approved and disbursed.
Venture capital	Dollar	Investment	Any investment or equity capital. (Includes private and personal investors.)