

CLIENT GROWTH ASSESSMENT

Business: _____ Name: _____

Address: _____ City: _____ State: TX Zip: _____

Email: _____ Advisor(s): _____

Description of Project: _____

We focus on making a substantial, positive difference for the businesses we serve – so we only record client impact that is attributed to SBDC assistance by our clients. **Please indicate the results from working with your SBDC Business Advisor below:**

START OR GROWTH MILESTONE

- Started my business with SBDC assistance on ____/____/____
- Grew or expanded my business with the help of the SBDC

FINANCIAL

- \$ _____ SBA Loan (7a, 504, or microloan)
- \$ _____ Commercial Loan _____
- \$ _____ Owner Investment _____
- \$ _____ Venture/Equity Capital _____
- \$ _____ Line of Credit _____
- \$ _____ Microloan _____
- \$ _____ Other: _____

JOBS

_____ Current number of employees: (_____ Fulltime _____ Part-time)
 _____ Jobs saved or retained: (_____ Fulltime _____ Part-time)

REVENUES

- \$ _____ Increased sales (existing businesses only)
- \$ _____ Prime Contract _____
- \$ _____ Subcontract _____
- \$ _____ SBIR/STTR _____
- \$ _____ Exports _____
- \$ _____ Other: _____

Other Assistance Provided

- _____ Certifications: 8a HUB DBE M/WBE _____
- _____ Cybersecurity - Federal Systems Security Plan
- _____ Employee handbook
- _____ Management: QuickBooks Leadership Planning
- _____ Licenses, Permits, Registrations, Regulatory compliance

MY GROWTH PLAN

The SBDC can be a continued resource to assist with future growth. Your Business Advisor will follow up in 3-6 months unless otherwise requested. Please describe how we might be of future assistance - for example, exploring:

- New markets and customers
- Debt restructuring
- Exporting
- Managing employees
- Other: _____

Client Comments:

Please continue on back if more space is needed

By signing below, 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 use still photographs, audio and and/or video file of me, my business and its employees. I understand that it is used 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 signature: _____ **Date:** ____/____/____

For internal use

SBDC Director signature: _____ **Date:** ____/____/____

- Client ID: _____ and _____ number of hours associated with this project
- Business Status field verified (For a start or expansion verify status as "Existing")
- SBA Status (Applicant, Borrower, 8(a) Procurement Assistance)
- Email and mailing addresses updated
- NAICS: _____

MIS Definitions for Critical Impact Reporting Areas

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

Category	MIS Field	MIS Module	Definition
Started My Business	Dollar Value	Milestones Enter \$0. <i>If there was a loan associated with the business start or expansion, enter the \$ amount under Investments. Carefully maintain the Business Status field (under Details) to reflect "Preventure" or "In Business".</i>	The pre-venture business now meets the SBA definition for existing business (See SOP): MIS advising sessions must occur <u>before and after</u> the business start date. (<i>Business are considered "Started" if at the previous session the client was not in business, and at a subsequent session was "in business".</i>)
Grew or Expanded My Business			<u>For existing businesses only</u> , growth in the business such as capital injected or contracts acquired, increased sales, number of employees, additional location, new product line, etc, for each project (<i>multiple expansions are allowed in a fiscal year.</i>)
Current Number of Employees	Number	Milestones <i>"Change in FT/PT Staff" fields are used to enter the current employment level in "Current Staff" MIS box, which is compared to "Initial jobs" by the MIS in the client profile. The difference = jobs created.</i>	For newly started businesses, include "1" for each owner in addition to other employees initially hired. For existing businesses, enter the new employment level - including owner(s).
Jobs Saved or Retained			For existing businesses only, the number of existing employees (including the owner) who kept their jobs as a result of SBDC assistance. <i>Jobs Retained may only be counted once per fiscal year.</i>
SBA Loan	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. 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	Dollar Value	Investments	Loans 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	Dollar Value	Investments <i>If there is also a loan, do not enter "approved" until the funds are actually disbursed.</i>	Includes the cash and/or market value of assets actually injected into the business start or expansion.
Increased Sales	Dollar Value	Milestones <i>"Change in Sales": Enter updated gross sales and the MIS will calculate the difference between that and the current profile amount.</i>	<u>For existing businesses only.</u> <u>Projected Sales are not allowed.</u>
Prime Contract or Subcontract	Dollar Value	Awards	Enter the value of prime or subcontracts awarded.

Other important impact areas include but are not limited to business plans, feasibility analysis, cost savings, improved management ability, and:

Category	MIS Field	MIS Module	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.)