



# 2012

## CLIENT GROWTH ASSESSMENT

Business Name: \_\_\_\_\_

Owner: \_\_\_\_\_

Business Address: \_\_\_\_\_

City: \_\_\_\_\_ Zip: \_\_\_\_\_

Primary Business Analyst: \_\_\_\_\_

Client ID: \_\_\_\_\_

Description of project: \_\_\_\_\_

The purpose of this document is to record what **impact** our work together had **on your business success**. Please indicate the results of our assistance below. Remember, we will also send you an *Impact Study Questionnaire* about two years from the time we first started working together asking you to confirm whether we helped you start your business, hire new employees, increase your sales, or obtain financing. Your **response** to all of the surveys we send is **critical** so that we can continue to receive the funding that enables us to provide you with free consulting services. We will remind you when it is time to complete the Impact Study Questionnaire.

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

- |          |   |     |  |
|----------|---|-----|--|
| \$ _____ | SBA Loan _____                              | [ ] | Started my business on ____/____/____      |
| \$ _____ | Commercial Loan _____                       | [ ] | Expanded my business                       |
| \$ _____ | Retained Sales (See definition on back)     | [ ] | Saved my business (See definition on back) |
| \$ _____ | Increased Sales                             | [ ] | Contract Employees PT____FT____            |
| \$ _____ | Owner Investment \$ _____ Other Capital Eq. | [ ] | Hired more employees PT____FT____          |
| \$ _____ | Venture Capital                             | [ ] | Retained my employees PT____FT____         |
| \$ _____ | Prime Contract Award                        | [ ] | Improve Marketing Strategies               |
| \$ _____ | Subcontract Award                           | [ ] | Improve Management Skills                  |
| \$ _____ | Other (Grants,etc) _____                    | [ ] | Improve Profitability                      |

**Level of service by Business Analyst: ( ) Excellent, ( ) Very Good, ( ) Good, ( ) Fair, and ( ) Poor.**

**Please share other significant project results, and describe how it helped your business:**

Note: All of the above information will be kept confidential to the extent allowable by law. For statistical and reporting purposes, we may compile and utilize information from you and other clients in the aggregate. We will not disclose or use your individual data without your prior permission.

Client Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**AZSBDC Business Analyst:** \_\_\_\_\_

Date: \_\_\_\_\_

**AZSBDC Center Director:** \_\_\_\_\_

Date: \_\_\_\_\_

**The AZSBDC can be a continued resource for your growing business. Tell us how we might be of further assistance in the near future or your long-term needs:**

- |                         |                                    |
|-------------------------|------------------------------------|
| [ ] Financing           | [ ] Government Contracting         |
| [ ] Operational Checkup | [ ] Employee/Growth Issues         |
| [ ] Financial Checkup   | [ ] International Trade            |
| [ ] Marketing           | [ ] Other (Please describe): _____ |

### MIS Definitions For Critical Impact Reporting Areas

Category	Definition
Business Started <sup>(1)</sup> <sup>(4)</sup>	<p>1. <u>Startup</u> - Any Client, at intake, In-Business only, who has been such for a period of less than one year.</p> <p>a. Any Startup, signed up as a client for SBDC services, if meeting definition for In-Business, will be designated a startup after an initial session, by checking Startup box in economic impact section of a subsequent session;</p> <p>b. If a Client, Preventure meets requirements for In-Business while working with the SBDC, they will be converted to In-Business status and designated a startup in a session, by checking Startup box in economic impact section of a session;</p> <p>c. If a closed Client, previously Preventure, who requests or is converted back to active Client status, and the last meeting with an SBDC counselor was one year or more, shall be converted to In-Business status, but shall NOT be counted as a Startup in economic impact.</p>
Business Expansion <sup>(1)</sup> <sup>(4)</sup>	For existing businesses only, growth in the business such as sales increase, number of employees, additional location, new product line, etc. as a direct result of SBDC assistance.
Jobs Created <sup>(1,2)</sup> <i>DO NOT USE "CHANGE IN STAFF"</i>	Jobs created – Should be an estimate using full time equivalent (FTE) for any jobs added as a result of the SBDC assistance, or created by the client during the process of being a client of the SBDC. For newly started businesses, the number of jobs created (including the owner) as a direct result of SBDC assistance. For existing businesses, the number of new employees added as a direct result of SBDC assistance, as verified by the client.
Jobs Retained <sup>(2)</sup>	Jobs retained – Same as above, except this represents jobs that have been saved as a result of or in part due to SBDC assistance (for example, you assisted the Client in writing a business plan to obtain a loan so that they do not have to lay off two employees). The jobs need to be truly in jeopardy of loss to count as a retained job, as verified by the client.
SBA Loan <sup>(2)</sup> <sup>(3)</sup>	SBA guaranteed and direct (business disaster) loans THAT HAVE BEEN APPROVED by SBA. 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 <sup>(2)</sup> <sup>(3)</sup>	Loans – record loans that the client receives while engaged as a Client, with the type of loan noted in Center IC. Loans submitted do not count toward goals, but are an indicator of future activity, and it is encouraged to record loan applications prior to documentation and closing.
Owner Investment <sup>(2)</sup> <sup>(3)</sup>	Includes the cash and/or market value of assets injected into the business start or expansion (i.e. Owner equity, collateral, Personal investment).
Investment Capital	As with loans, record other forms of investment capital under this category, and note the type. Avoid duplications of entry between this category and Loans (above). Often loans are obtained to purchase capital, and we should avoid double counting the capital under each category.
Sales Increase <sup>(2)</sup> <sup>(3)</sup>	Increased sales should be recorded as a fixed dollar amount only (avoid using the % increase designation). You should only record the changed sales from your last sales recording, or base period, and avoid over-reporting due to a seasonality increase for a client.
Prime Contractor Subcontract	Enter the value of prime or subcontracts awarded due to SBDC assistance provided.

<sup>(1)</sup> Outcomes count toward State-mandated goals

<sup>(2)</sup> Activity reported to SBA

<sup>(3)</sup> Also report any associated starts or expansions and jobs created or retained.

<sup>(4)</sup> Also report jobs created or retained.

Forms lacking client signature will be accepted only as an exception, and with AZSBDC 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	Definition
Other federal loan	Non-SBA federally guaranteed or direct loans approved as a direct result of SBDC assistance.
Venture capital	Any investment capital that has been provided to the client as a direct result of SBDC assistance. (Includes private and personal investors.)
Saved Business	Only Check this box if the SBDC provided substantive service that made the difference between going out of business and being able to continue operations.
Retained Sales	As with retained jobs, this category is only used when the business was at risk, and with the SBDC services you helped save the business from losing sales. A strong case needs to be made that without SBDC