

How to fill out the Client Growth Assessment document:

1. Please fill in your **Business Name, Owner, Business Address, City and Zip Code**.
2. For **Primary Business Analyst** - you will put in either Jim Hunter or Bret Carpenter depending on who you worked with.
3. Don't worry about **Client ID**
4. **Description of Project** – fill in indicating if this was a start-up or existing business support.
5. Under the **Financial Impact Section**, please fill in the following with 2014 Calendar Year Data:
 - a. **SBA Loan** – if you got an SBA backed loan during 2014 please put the dollar amount in the line to the left and the bank name in the line on the right.
 - b. **Commercial Loan** - if you got a standard commercial loan during 2014 please put the dollar amount in the line to the left and the bank name in the line on the right.
 - c. **Retained Sales** – there is no explanation for what this is so don't worry about it.
 - d. **Increased Sales** – if the assistance of the SBDC contributed to a sales increase from last year's overall sales, please put a dollar amount of the year to year difference in the blank line.
 - e. **Owner Investment** – please record the amount money or capital value (equipment, real estate...) that was put into the business in 2014 for startup or growth by the owner(s).
 - f. **Other Capital** – please record other money that was put into the business by a private investors (friends, family...) during 2014 for startup or growth.
 - g. **Venture Capital** – please record the amount of Venture Capital that your company received in 2014. Venture Capitalists are professional investors, you would know if you worked with one.
 - h. **Prime Contract Award/Subcontract Award** – if you received government contracts with SBDC/PTAC support please put the total of the award(s) in the blank. If you don't do government contracting, just ignore.
 - i. **Other (Grants, etc)** – if you received some sort of grant that you don't have to pay back, include it here. An example would be the Coconino IDA program, you would enter the matching amount that the County provided.
6. Under the **Business Milestones Section** (right hand column), please record the following:
 - a. **Started my business on** – if you started in 2014, please put in the date.
 - b. **Expanded my business** – if you grew your business in 2014 (increased sales, # of employees, new product line, added a location..), please check the box.
 - c. **Saved my business** – if the SBDC helped prevent you from closing your doors, please check the box.
 - d. **Hired more employees** – if our assistance helped you hire more staff this year, please indicate how many part time or full time staff that would be over last year's staff levels. If this is your first year, indicate your current staffing levels for part time and full time workers including yourself.
 - e. **Retained my employees** - if the SBDC helped prevent you from laying off employees, please check the box and indicate how many part time or full time jobs were saved.
 - f. **Improve Marketing Strategies/Management Skills** – if the SBDC helped in these areas, please check the box.
 - g. **Improve Profitability** – if the SBDC helped your company be more profitable, please check the box.

7. **Level of service By Business Analyst** – rate our help by checking in the parentheses.
8. **Share other significant results** – if you have the time, let us know about significant results. We would love to hear about them. Don't worry if you don't want to fill this part out.
9. **Client Signature** – please sign and date the document.
10. **Further assistance** – let us know how we can help you further if appropriate.
11. **Getting the form back to the SBDC** – you can scan it and email it back to us, mail it to us (as long as it gets to us by 1/6/2015), or we will be glad to come and pick it up from you. Just let us know.

Thank you very much, it is a pleasure to work with you.

Jim Hunter, Interim Director

Bret Carpenter, Business Analyst