



SBDC –Initial Session Guide / Diagnostic Questions

START UP / PRE-VENTURE

Purpose: This tool is to be used as a guide to establish a relationship with the client, gather background information to assess the client's needs, and create a plan for working with the client.

A. Open the session with storybook:

- ☐ Review e-center online registration information with client; edit as necessary
- ☐ Ask how client heard about the SBDC
- ☐ Educate client about SBDC and stakeholders
- ☐ Explain our services (no-cost advising/counseling, low-cost training)
- ☐ Set clear expectations of what the SBDC does and does not do. Explain that the work we do together is a two-way street – the client needs to commit to do their part and we commit to doing our part.
- ☐ Discuss client confidentiality, trust and the importance of honesty in the counseling process
- ☐ Set expectation for completion of SBDC surveys, and show survey example
- ☐ Set expectation that impact is collected in the future & show Impact Form
- ☐ Explain that there is no limit to how long client can work with SBDC
- ☐ Introduce yourself and discuss your background (to establish perception of expertise and trust)

B. Collect a detailed client background/history:

- ☐ How long have you lived in the area? [Click here to enter text.](#)
- ☐ Where have you lived before? [Click here to enter text.](#)
- ☐ What is your educational background (formal, trade, on-the-job)? [Click here to enter text.](#)
- ☐ What is your work experience, including volunteer work? [Click here to enter text.](#)
- ☐ What do you like about your work? [Click here to enter text.](#)

- ☐What do you dislike about your work? [Click here to enter text.](#)
- ☐Have you managed, supervised, or trained others? [Click here to enter text.](#)
- ☐Have you hired or fired employees? [Click here to enter text.](#)
- ☐What is your current work schedule? [Click here to enter text.](#)
- ☐How do you spend your time when you are not at work? [Click here to enter text.](#)
- ☐What is your goal for yourself and your business a year from now and what is your end game?
[Click here to enter text.](#)

C. Identification or analysis of problem or opportunity:

- ☐What assistance are you seeking from the SBDC? [Click here to enter text.](#)
- ☐What is the reason you want to start this business?[Click here to enter text.](#)
- ☐What steps have you taken so far? [Click here to enter text.](#)
- ☐What is your timeframe for moving forward? [Click here to enter text.](#)
- ☐How many hours a week do you expect to spend running the business? [Click here to enter text.](#)
- ☐Describe your business idea.[Click here to enter text.](#)
- ☐Who will be the owners of the business? [Click here to enter text.](#)
- ☐What will be your legal structure (sole proprietorship, partnership, LLC, corporation)? [Click here to enter text.](#)
- ☐Where will your business be located?[Click here to enter text.](#)
- ☐Who is your competition?[Click here to enter text.](#)
- ☐Who will be your customers?[Click here to enter text.](#)
- ☐How will you market your product/service? [Click here to enter text.](#)

☐How much money will you need to take home from the business each month? [Click here to enter text.](#)

☐Have you made a list of your startup costs? ☐Yes ☐No

☐How will you pay for first X months' operations (savings, income from job, etc.)?[Click here to enter text.](#)

☐Who will do your bookkeeping? [Click here to enter text.](#)What accounting software will you use?

[Click here to enter text.](#)

☐Are your personal income tax reports filed up to date? [Click here to enter text.](#)Who prepares them? [Click here to enter text.](#)

☐What loan payments do you have? [Click here to enter text.](#)What are your credit card balances?[Click here to enter text.](#) Other debts? [Click here to enter text.](#)Are there any debts that were not paid? i.e. student loans[Click here to enter text.](#)

☐Is there any information you would like for me to be aware of? [Click here to enter text.](#)

D. Resources:

☐**Basic Steps to Registering Business:** Review document with client.

☐**SBDCnet:** Is a research request submitted? ☐Yes ☐No

If yes, SBDCnet research shared with client? ☐Yes ☐No

☐**IBISWorld:** Has an IBIS report been discussed and shared with client? ☐Yes ☐No

☐**ReferenceUSA:** [Click here to enter text.](#)

☐**DemographicsNow:** [Click here to enter text.](#)

☐**Other resources:** [Click here to enter text.](#)

E. Handouts:

Given to client: [Click here to enter text.](#)

Webpages Reviewed: [Click here to enter text.](#)

Referred to: [Click here to enter text.](#)

Other: [Click here to enter text.](#)

Items to send: [Click here to enter text.](#)

Other: [Click here to enter text.](#)

F. Impact review:

Milestone Potential: [Click here to enter text.](#)

Investment: [Click here to enter text.](#)

Loan: [Click here to enter text.](#)

Jobs: [Click here to enter text.](#)

New Business: [Click here to enter text.](#)

If impact has occurred, Economic Impact Form:

Completed and signed: ☐ Yes ☐ No

Uploaded to Neoserra Milestone and/or Capital Funding: ☐ Yes ☐ No

G. For next session: Scheduled Date: [Click here to enter a date.](#) Time: [Click here to enter text.](#)

Client homework assignment: [Click here to enter text.](#)

SBDC homework assignment: [Click here to enter text.](#)

H. Important: Enter session notes in Neoserra, to include the following:

☐ Description of what happened during session: [Click here to enter text.](#)

☐ Identification or analysis of problem or opportunity: [Click here to enter text.](#)

☐ Actions taken, recommendations made, follow-up, and next step, if any: [Click here to enter text.](#)