



Small Business Development Centers of Ohio Counseling Information Form

Expiration Date: 09/30/2006

- 36a. Date Counseled _____ 36b. History One Time Initial Follow-Up Close-Out
37. Case Manager's Name _____
38. Did counseling received result in starting a business? Yes No
39. Number of people attending this session (answer during initial counseling session only). _____

Part III: Counselor Record

| | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|--|--|---|--------------------------------------|---|--|--|--|--|--|---|---|---|---|---|---|---|--|---------------------------------------|--|---|---|-------------------------------------|--|--|---------------------------------------|--|--|---|--|--------------------------------|--|--------------------------------------|---|--|--|---|---|--|---|--|---|--|
| 40. Counselor Name | | 41a. Communication Type <input type="checkbox"/> Face to Face <input type="checkbox"/> Online <input type="checkbox"/> Telephone | 41b. Language Used <input type="checkbox"/> English <input type="checkbox"/> Spanish <input type="checkbox"/> Other (Specify) | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 42. Client Name (please use the same name from original 641 Part 1) (Last, First, MI) | | 43. Email | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 44. Telephone Primary _____ Secondary _____ | | 45. Fax | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 46. Street Address /P.O. Box | 47. City | 48. State | 49. Zip +4 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 50. Business Status <input type="checkbox"/> Existing Declining <input type="checkbox"/> Existing Healthy <input type="checkbox"/> Pre-venture (If Pre-venture selected, skip to 53) <input type="checkbox"/> Start-up | 51. Company Name | 52. Month & Year Business Started? | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 53a. What is the nature of counseling you provided the client? | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <table style="width: 100%; border: none;"> <tr> <td><input type="checkbox"/> No Response</td> <td><input type="checkbox"/> Commercialization</td> <td><input type="checkbox"/> Intellectual Property</td> <td><input type="checkbox"/> Regulatory Compliance</td> </tr> <tr> <td><input type="checkbox"/> Access to Capital – Debt</td> <td><input type="checkbox"/> Computer Systems</td> <td><input type="checkbox"/> International Trade</td> <td><input type="checkbox"/> Small Business Innovation Research</td> </tr> <tr> <td><input type="checkbox"/> Access to Capital – Equity</td> <td><input type="checkbox"/> Customer Relations</td> <td><input type="checkbox"/> International Trade Country Profiles</td> <td><input type="checkbox"/> Strategic Planning</td> </tr> <tr> <td><input type="checkbox"/> Agribusiness</td> <td><input type="checkbox"/> Engineering R&D</td> <td><input type="checkbox"/> International Trade Market Research</td> <td><input type="checkbox"/> Tax Planning</td> </tr> <tr> <td><input type="checkbox"/> Accounting/Budget/Inventory Setup</td> <td><input type="checkbox"/> eVantage</td> <td><input type="checkbox"/> Inventory Control</td> <td><input type="checkbox"/> Technology</td> </tr> <tr> <td><input type="checkbox"/> Business Planning</td> <td><input type="checkbox"/> Federal & State Tech. Program</td> <td><input type="checkbox"/> Legal Issues</td> <td><input type="checkbox"/> Women's Certification</td> </tr> <tr> <td><input type="checkbox"/> Business Start-Up</td> <td><input type="checkbox"/> Financial Analysis</td> <td><input type="checkbox"/> Management/Leadership</td> <td><input type="checkbox"/> Other</td> </tr> <tr> <td><input type="checkbox"/> Buy/Sell Business</td> <td><input type="checkbox"/> Franchising</td> <td><input type="checkbox"/> Market Diversification</td> <td></td> </tr> <tr> <td><input type="checkbox"/> Cash Flow Analysis & Management</td> <td><input type="checkbox"/> Government Contracting</td> <td><input type="checkbox"/> Marketing Planning</td> <td></td> </tr> <tr> <td><input type="checkbox"/> Community Dev. Block Grant</td> <td><input type="checkbox"/> Human Resources</td> <td><input type="checkbox"/> Operations Analysis & Planning</td> <td></td> </tr> </table> | | | | <input type="checkbox"/> No Response | <input type="checkbox"/> Commercialization | <input type="checkbox"/> Intellectual Property | <input type="checkbox"/> Regulatory Compliance | <input type="checkbox"/> Access to Capital – Debt | <input type="checkbox"/> Computer Systems | <input type="checkbox"/> International Trade | <input type="checkbox"/> Small Business Innovation Research | <input type="checkbox"/> Access to Capital – Equity | <input type="checkbox"/> Customer Relations | <input type="checkbox"/> International Trade Country Profiles | <input type="checkbox"/> Strategic Planning | <input type="checkbox"/> Agribusiness | <input type="checkbox"/> Engineering R&D | <input type="checkbox"/> International Trade Market Research | <input type="checkbox"/> Tax Planning | <input type="checkbox"/> Accounting/Budget/Inventory Setup | <input type="checkbox"/> eVantage | <input type="checkbox"/> Inventory Control | <input type="checkbox"/> Technology | <input type="checkbox"/> Business Planning | <input type="checkbox"/> Federal & State Tech. Program | <input type="checkbox"/> Legal Issues | <input type="checkbox"/> Women's Certification | <input type="checkbox"/> Business Start-Up | <input type="checkbox"/> Financial Analysis | <input type="checkbox"/> Management/Leadership | <input type="checkbox"/> Other | <input type="checkbox"/> Buy/Sell Business | <input type="checkbox"/> Franchising | <input type="checkbox"/> Market Diversification | | <input type="checkbox"/> Cash Flow Analysis & Management | <input type="checkbox"/> Government Contracting | <input type="checkbox"/> Marketing Planning | | <input type="checkbox"/> Community Dev. Block Grant | <input type="checkbox"/> Human Resources | <input type="checkbox"/> Operations Analysis & Planning | |
| <input type="checkbox"/> No Response | <input type="checkbox"/> Commercialization | <input type="checkbox"/> Intellectual Property | <input type="checkbox"/> Regulatory Compliance | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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| <input type="checkbox"/> Access to Capital – Equity | <input type="checkbox"/> Customer Relations | <input type="checkbox"/> International Trade Country Profiles | <input type="checkbox"/> Strategic Planning | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> Agribusiness | <input type="checkbox"/> Engineering R&D | <input type="checkbox"/> International Trade Market Research | <input type="checkbox"/> Tax Planning | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> Accounting/Budget/Inventory Setup | <input type="checkbox"/> eVantage | <input type="checkbox"/> Inventory Control | <input type="checkbox"/> Technology | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> Business Planning | <input type="checkbox"/> Federal & State Tech. Program | <input type="checkbox"/> Legal Issues | <input type="checkbox"/> Women's Certification | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> Business Start-Up | <input type="checkbox"/> Financial Analysis | <input type="checkbox"/> Management/Leadership | <input type="checkbox"/> Other | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> Buy/Sell Business | <input type="checkbox"/> Franchising | <input type="checkbox"/> Market Diversification | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> Cash Flow Analysis & Management | <input type="checkbox"/> Government Contracting | <input type="checkbox"/> Marketing Planning | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> Community Dev. Block Grant | <input type="checkbox"/> Human Resources | <input type="checkbox"/> Operations Analysis & Planning | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Describe specific assistance requested in the space provided. _____ | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 53b. What assessment tools did you use during counseling? | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <table style="width: 100%; border: none;"> <tr> <td><input type="checkbox"/> Enterprise</td> <td><input type="checkbox"/> Environmental – Energy</td> <td><input type="checkbox"/> Grants – SBIR Readiness</td> <td><input type="checkbox"/> Lean</td> </tr> <tr> <td><input type="checkbox"/> Enterprise - Performance Benchmarking</td> <td><input type="checkbox"/> Environmental – Waste Reduction</td> <td><input type="checkbox"/> Grants – STTR Readiness</td> <td><input type="checkbox"/> Marketing</td> </tr> <tr> <td><input type="checkbox"/> Enterprise - IQa</td> <td><input type="checkbox"/> Financial</td> <td><input type="checkbox"/> Human Resources</td> <td><input type="checkbox"/> Quality – ISO/TS 16949</td> </tr> <tr> <td><input type="checkbox"/> Enterprise - QuickView</td> <td><input type="checkbox"/> Financial – Bi-Far High Impact</td> <td><input type="checkbox"/> Information Technology</td> <td><input type="checkbox"/> Other</td> </tr> <tr> <td><input type="checkbox"/> Environmental</td> <td><input type="checkbox"/> Financial - FISCAL</td> <td><input type="checkbox"/> International Trade - Export Readiness</td> <td></td> </tr> </table> | | | | <input type="checkbox"/> Enterprise | <input type="checkbox"/> Environmental – Energy | <input type="checkbox"/> Grants – SBIR Readiness | <input type="checkbox"/> Lean | <input type="checkbox"/> Enterprise - Performance Benchmarking | <input type="checkbox"/> Environmental – Waste Reduction | <input type="checkbox"/> Grants – STTR Readiness | <input type="checkbox"/> Marketing | <input type="checkbox"/> Enterprise - IQa | <input type="checkbox"/> Financial | <input type="checkbox"/> Human Resources | <input type="checkbox"/> Quality – ISO/TS 16949 | <input type="checkbox"/> Enterprise - QuickView | <input type="checkbox"/> Financial – Bi-Far High Impact | <input type="checkbox"/> Information Technology | <input type="checkbox"/> Other | <input type="checkbox"/> Environmental | <input type="checkbox"/> Financial - FISCAL | <input type="checkbox"/> International Trade - Export Readiness | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> Enterprise | <input type="checkbox"/> Environmental – Energy | <input type="checkbox"/> Grants – SBIR Readiness | <input type="checkbox"/> Lean | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> Enterprise - Performance Benchmarking | <input type="checkbox"/> Environmental – Waste Reduction | <input type="checkbox"/> Grants – STTR Readiness | <input type="checkbox"/> Marketing | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> Enterprise - IQa | <input type="checkbox"/> Financial | <input type="checkbox"/> Human Resources | <input type="checkbox"/> Quality – ISO/TS 16949 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> Enterprise - QuickView | <input type="checkbox"/> Financial – Bi-Far High Impact | <input type="checkbox"/> Information Technology | <input type="checkbox"/> Other | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <input type="checkbox"/> Environmental | <input type="checkbox"/> Financial - FISCAL | <input type="checkbox"/> International Trade - Export Readiness | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 54a. Prep Hours | 54b. Contact Hours | 54c. Travel Hours | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

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55a. Assessment:

55b. Action:

55c. Agreement:

56a. Updated Economic Indicators

| Current SBA Loans | Current Non SBA Loans | Current Gross Sales | Current Export Sales | Current Government Contracts | Current Equity | Current Cost Avoidance | Current Employees |
|-------------------|-----------------------|---------------------|----------------------|------------------------------|----------------|------------------------|-------------------|
| | | | | | | | |

56b.
SBA or Resource Partner Service Contributed to the Following:

| No. of Government Contract/ Subcontracts Received | No. of Certification Received (SDB, HUBZone, local, etc.) |
|--|---|
| | |

Instructions for completing SBDC Form 641 Part 3

Part 3 should be completed to report small business counseling of greater than 60 minutes for the client's initial visit and any following visits regardless of time.

Part 3

Field 36a: Enter the date the client was counseled.

Field 36b: Select what type of counseling session this is.

1. One Time - Any counseling session expected to require only that single session.
2. Initial - Any counseling session expected to require another session.
3. Follow-Up - Any non-final counseling provided to a client who has already received either a One Time or Initial counseling session.
4. Close-Out – Final session and closing of the client's records.

Field 37: Enter the case manager's name. Case manager must be a CBA.

Fields 38-40: Select or enter information requested.

Field 41a: Select the manner in which you provided counseling.

Field 41b: Select the language you counseled in.

Fields 42-49: Enter the information requested.

Field 50: Select the client's current business status. If Pre-venture is selected, you may skip to Field 34.

1. Existing Declining: A company that is two years or older with even or decreasing sales.
2. Existing Healthy: A company that is two years or older with even or increasing sales.
3. Pre-Venture: A company that is in the planning process or has not made its first sale.
4. Start-Up: A company zero- to two-years-old that has made its first sale.

Fields 51-53a: Select or enter information requested.

Field 53b: Select any assessment tools you used to counsel the client.

Field 54: Enter your time in quarter hours (e.g. 15 minutes = .25).

Field 55a: Enter your assessment of the client for this session related to the counseling requested.

Field 55b: Enter the action you took in counseling the client (e.g. any recommendations).

Field 55c: Enter anything agreed to in the counseling session (e.g. "homework" for you or the client).

Field 56a: Enter the current economic indicator information. This is what the baseline will be subtracted from for Economic Impact.

1. You must enter at least one employee for Start-Up and Existing businesses.
2. Enter zeroes only for Pre-venture businesses.

Field 56b: Enter the current number of government contracts and certifications.