Phase	> 90 days prior to submission deadline				90 days prior to submission deadline					60-30 days prior to submission deadline			4-2 weeks pri	r to submission deadline			4-2 days prior to deadline	Deadline + 1 week after deadline +1-2 weeks after						
ont Stage Customer Actions	Follow NSF SBIR on social media See ads	(Think about starting a company) Pursue post-doc studies	Attend events for fundraising.		Speak to NSF Staff	Sign up for newsletter (listserv) Research and figure out other awardees		Watch videos Read technology topic areas	Submit Executive Summary	Read solicitation. Attend webinar.		Read FAQs. Apply for a DUNS number (requires EIN tax number) Register entity with SAM.gov (requires EIN tax number)	egister firm with SBIR.gov Register firm with NSF Fastlane (requires EIN, DUNS) Register firm with NSF Fastlane (requires EIN, DUNS) Register firm with NSF Fastlane (requires EIN, DUNS)	to FastLane			Call help desk Submit proposal				PI receives award letter. Register for Awards Cash Management System. Awardee can pull down funding.	Awardees attend Phase I grantee workshop.		Provide updates via program director office hours, monthly phone calls, and/or written reports At the end of the Phase I period, submit final report. Customer able to access remaining funding Apply for Phase II ing funding
Touchpoints & Devices		Fax, Mail or Online: https://www. irs.gov/businesses/small-busi- nesses-self-employed/employ- er-id-numbers-eins	SBA road tour: http://www. sbirroadtour.com/ VC Summit and similar investor events Local Transfer of Technology or Development of Technology Transfer office	gy (ToT) Tradeshows and conferences logy (e.g., CES, SXSW) Funding webinars (e.g., CIT.org ,Äî Center for Innovation Technology: http://www.cit.org/service-lines/ cit-entrepreneur-webinars/)	Business card (exchanged from event) NSF SBIR website	NSF SBIR website NSF SBIR awards search Reaching out to network to they know NSF SBIR	see if Word-of-mouth Crunchbase LinkedIn	NSF SBIR website / YouTube NSF SBIR website	Emails (PD contact info obtained from website) Program Director receives an unsolicited email; prompts them for a summary. Cold call email	NSF SBIR website NSF SBIR website Email si	signature Social media Listserv	NSF SBIR website: https://www. nsf.gov/pubs/2017/nsf17029/ nsf17029.jsp Online: https://fedgov.dnb.com/ webform Online: https://fedgov.dnb.com/ portal/SAM/ regi	Online: https://www.sbir.gov/ pistration Online: https://www.fastlane.nsf. gov/a0/about/registration.htm				FastLane							NSF SBIR: https://www.nsf.gov/eng/iip/sbir/reporting.jsp
Other Actions														(structured) Financials / Budget (structured); Refer to Department of Labor/ Bureau of Labor Statistics for salary ranges Project Summary (structured) Personnel (structured) Personnel (structured)			A lot of PDFs				Ask questions about drawing down funds.	Email from Program Director	Email from Amanda Email from Selda Email from Comms (Kelly)	Log in and submit through Research.gov: https://identity. research.gov/sso/UI/Login
ack Stage Systems & Processes		IRS								WebEx		Dun & Bradstreet System for Award Management (SAM)	BIR FastLane n/a					Submission deadline Proposals that do not meet basic specifications are returned without review (RWR)	FastLane sends an email that sounds like an acceptance, but it isn't Applicant can see when proposal is assigned to reviewers (but receives no notification). Managed via e-jacket. Applicant can see when proposal has been assigned for panel review. Managed via e-jacket.	PI notified by email / status Managed via e-jacket. update whether proposal is recommended or rejected. Managed via e-jacket.	Award letter sent to PI via e-jacket.			SAM
Other Actions				Solicitation poste	od							?? Che	neck EIN and/or DUNS number. Third-party contacts provide letters of support in writing.					NSF screens proposals		Emails are answered, standard process, etc. Proposals that have been recommended undergo multiple reviews from PD to Division Director, then 30 days to financial office.		Program directors send out email		research.gov approval process Remaining funds released to customer.
Infrastructure, Partners & Networks												IRS IRS	S and/or D&B ??											
otes		(1) What is the motivation for someone to start a company? (2) What other actions do they need to take in order to become a company? (3) How much time/\$ does it take to obtain an EIN?							Some email different PDs and get different answers from each. 10-12% of executive summaries fall through the cracks and are left unanswered. (This is sensitive; a known problem)	Each solicitation only active ~60 NSF SBIR is not allowed to conduct these until the solicitation has been posted.		FAQs need to undergo legal (1) Takes 30 days for a free DUNS (1) How long does this process (1) Now long does this process review number or 5 days for a \$50 fee. take if you,Ãôre starting from arous scratch?	May take 2-6 weeks turn- ound. (1) Takes 1-2 days turnaround. (2) Need to identify Principal Investigator (PI) (2) Need to identify Principal Investigator (PI) (3) Can they submit soft copies? (4) Do the letters need to be notarized? I.e., how do you verify/authenticate?				This is a known pain point as the applicant has to create another account to submit as a research administrator. Applications wind up being disqualified because they are deemed incomplete. (1) Help Desk receives hundreds of calls during peak period	Usually takes about 1 week Reasons for RWR: (1) Submitted late; (2) Projects with project descriptions > 15 pages (if the extra pages have no significant content, we will usually let them go to panel); (3) Projects asking for significantly more than \$225,000; (4) Missing a commercial discussion will get flagged by the staff and returned. If the commercial discussion exists in a weird format, it'll generally be allowed to go to panel (with the PD consulted in some edge cases)	Applicant has to proactively log in to check status.	Decisions are final. No protests ,Äî but are allowed to submit another Phase I proposal. (1) Do appli- cants receive additional feedback on why they were rejected?	20% of the money is withheld until the very end of the Phase I period upon receipt of the final report.			
Customer value	Discovery: Learns about (?) opportunity. What do we the viewer to learn from the viewer to learn	runding Education ve want ne ads?	Interaction / networking with Assess opportunity cost of pursuing one funding path vs. another			Learn about upcoming announcements. (Quarterly updates)			Receive feedback that can be valuable in shaping their proposal for submission and potentially improve their chance of receiving an award.															
Organizational value	Customer development																							