

SMB Client Intake Form

Welcome! This form helps us understand your business so we can provide personalized, high-impact consulting. Your answers will remain confidential and help generate a summary report for your consulting team. It consists of 11 sections. Estimated time to complete: **10–20 minutes**.

* Indicates required question

1. Email *

Section 1: General Company Information

Tell us about your company's basic information. This helps us set up your profile and ensure communication is accurate.

2. Company Name *
(Full legal business name)

3. Website *

4. Founder/CEO of company *

Who founder the company (what is their origin story), and why and what problem were they trying to solve when they started the business.

5. Primary Contact Name *

6. Role/Title *

7. Email *

(Best business email for future correspondence)

8. Phone Number *

9. LinkedIn Profile

10. Company HQ Address *

Street, Suite, City, State, Country, ZIP

11. Year Established *

12. Company Type *

What is the legal structure of the company?

Mark only one oval.

☐ LLC

☐ C-Corp

☐ S-Corp

☐ Sole Prop

☐ Nonprofit

☐ Other: _____

Section 2: Company Overview

Provide an overview of your company's mission, offerings, and current scale. This gives us context for your goals.

13. Mission and Vision *

What is your company's purpose and long-term vision? (max 300 words)

14. Products and/or Services *

List what you offer in bullet form (e.g., café drinks, catering, coffee beans)

15. Differentiators *

What makes you unique? Please explain in detail. (e.g., sustainability, pricing, location, niche market)

16. Industry Sector *

Select all that apply

Check all that apply.

- ☐ Food & Beverage
- ☐ Manufacturing
- ☐ Retail
- ☐ Healthcare
- ☐ Education
- ☐ Professional Services
- ☐ Technology
- ☐ Agriculture
- ☐ Other: _____

17. Stage of Business *

Mark only one oval.

- ☐ Idea/Concept
- ☐ Pre-revenue
- ☐ Revenue-generating - cashflow negative
- ☐ Revenue-generating - break even
- ☐ Revenue-generating - cashflow positive
- ☐ Growth - Equity led
- ☐ Growth - Debt led
- ☐ Growth - Hybrid (debt + equity)
- ☐ Mature
- ☐ Other: _____

18. Number of Full-Time Employees *

Include all permanent full-time staff

Mark only one oval.

☐ 1–5

☐ 6–20

☐ 21–50

☐ 51–200

☐ 200+

19. Number of Part-Time Employees/Contractors

20. Monthly Revenue *

Mark only one oval.

☐ <\$5K

☐ \$5–25K

☐ \$25–100K

☐ \$100–500K

☐ >\$500K

☐ Pre-Revenue

☐ Decline to Answer

21. Profitability *

Mark only one oval.

- ☐ Profitable
- ☐ Break-even
- ☐ Operating at a loss
- ☐ Not sure

Section 3: Team

Help us understand the people behind your business and their relevant experience.

22. Key Team Member Bios

List each key person's background (education, prior roles, years of experience)

Section 4: Business Challenges & Goals

Describe where you're facing challenges and what success looks like for your business.

23. Areas needing help *

Check all areas where you'd like support

Check all that apply.

- ☐ Strategy
- ☐ Marketing
- ☐ Finance
- ☐ Operations
- ☐ Supply Chain
- ☐ People & Culture
- ☐ Technology
- ☐ Growth
- ☐ Product
- ☐ Other: _____

24. Main Challenge *

What's the biggest problem you're trying to solve? (max 100 words)

25. What keeps the CEO up at night? *


26. Top 3 Business Goals *

Use SMART goals if possible (e.g., "Grow online sales by 20% in 6 months") .

SMART goals are a framework for setting clear, attainable, and trackable goals. The acronym SMART stands for:

- **Specific:** Clearly define what you want to accomplish.
- **Measurable:** Include a way to measure progress and determine if the goal has been met.
- **Achievable:** Ensure the goal is realistic and possible to reach.
- **Relevant:** Make sure the goal aligns with your broader objectives and priorities.
- **Time-bound:** Set a specific deadline for achieving the goal.

27. Worked with consultants before?

 Dropdown

Helps us understand your experience with support organizations

Mark only one oval.

☐ Yes

☐ No

Section 5: Operational Details

Let us know how your business operates day-to-day — sales, customers, supply chain, and systems.

28. Supply Chain Model

Briefly describe how your business produces or delivers its product or service. This might include where your materials come from, who helps you make or package your product, and how it gets to your customers.

If you're a service business, share the key steps or partners involved in delivering that service.

Examples:

- "We purchase raw materials from local farms, manufacture in-house, and ship via UPS."
- "Our software is developed internally and delivered to customers through our website."

Mark only one oval.

- ☐ In-house
- ☐ Outsourced
- ☐ Hybrid
- ☐ Not applicable
- ☐ Other: _____

29. Supply Chain Description

Briefly describe how your business produces or delivers its product or service. This might include where your materials come from, who helps you make or package your product, and how it gets to your customers.

If you're a service business, share the key steps or partners involved in delivering that service.

30. Sales Channels

How do you sell (e.g., online store, retailers, licensing)?

Check all that apply.

- ☐ Online (Direct-To-Customer, DTC)
- ☐ Wholesale/Retail
- ☐ Subscription
- ☐ Licensing
- ☐ Other

31. Customer Segments

Who do you primarily serve? Check all that apply

Check all that apply.

- ☐ B2B (Business-to-Business)
- ☐ B2C (Business-to-Customer)
- ☐ Government
- ☐ Nonprofit
- ☐ Other

32. Please describe you customer persona & demographics. *

Who buys your product and/or service and why? What value are they getting from your product that they are not getting from a competitor.

33. Top Markets *

Top 3 geographic regions or cities where you operate or target. Eg list as 1. Chicago 2. Phoenix 3. Seattle, etc

34. Competitors

List your top four competitors (Name, website, and product/service on which they are competing with you)

35. Technology Stack

List tools you use (e.g., Shopify, Stripe, QuickBooks) and approximate cost. Use a comma to separate the tools.

Section 6: Financial Snapshot

This helps us understand your financial performance.

36. Last Fiscal Year Revenue (USD)

Approximate total revenue last year

37. Last Year Cost of Goods Sold (USD)

38. Last Year Operating Expenses (USD)

39. Last Year Net Income (USD)

40. Last Year Cash on Hand (USD)

41. Current YTD Revenue (USD)
Approximate total revenue last year

42. Current YTD Cost of Goods Sold (USD)

43. Current YTD Operating Expenses (USD)

44. Current YTD Net Income (USD)

45. Current YTD Cash on Hand (USD)

Section 7: Legal and IP (intellectual property)

Share information about intellectual property and any legal risks.

46. Own IP?

Do you own registered trademarks, patents, etc.?

Mark only one oval.

☐ Yes

☐ No

☐ Not Applicable

☐ Other: _____

47. IP Details

List IP items (e.g., "Trademarked logo", "Patent #XYZ123")

48. Legal Concerns?

Any ongoing or anticipated legal issues?

Mark only one oval.

☐ Yes

☐ No

49. Legal Details

Optional – this will remain confidential

Section 8: Impact & Values

We love to understand the broader impact and values of the businesses we support.

50. Company Impact Areas

Select areas where you actively make a difference

Check all that apply.

- ☐ Job Creation
- ☐ Local Economy
- ☐ Environment
- ☐ Community
- ☐ DEI (Diversity, Equity, Inclusion)
- ☐ Other: _____

51. Aligned with SDGs?

UN Sustainable Development Goals - The UN Sustainable Development Goals (SDGs), also known as the Global Goals, are a set of 17 interconnected goals adopted by the United Nations in 2015. They represent a universal call to action to end poverty, protect the planet, and ensure peace and prosperity for all by 2030.

Mark only one oval.

- ☐ Yes
- ☐ No
- ☐ Not sure

52. If Yes, List SDGs

E.g., "Goal 12: Responsible consumption & production"

Section 9: Expectations & Consent

If you go through an SMB Lab or other CSMB initiatives, we may be able to provide consulting work through various avenues. Let us know your availability and preferences for working with us, and give consent to use your information as agreed.

53. Preferred Project Timeline

Desired start and project duration (e.g., "Start in July, run for 2 months")

54. Level of Involvement

How often would you like to engage with us?

Mark only one oval.

- ☐ Weekly
- ☐ Monthly
- ☐ Final Presentation only
- ☐ Flexible
- ☐ Other: _____

55. Are you open to let student(s) work on your problem statements? *

Mark only one oval.

☐ Yes

☐ No

☐ Other: _____

56. What does success look like? *

Your definition of a successful engagement . Please note this is just an initial conversation starter, and may differ from final Statement of Work.

57. Consent & Use *

Check all that apply.

☐ I consent to have my information reviewed by the ASU teams and agree to follow up communication for clarification or support.

☐ I authorize the use of anonymized data in internal reports, research, and educational case studies.

☐ I'd be open to participating in a featured case studies.

58. Digital Signature *

59. Date *

Example: January 7, 2019

File Uploads (optional)

Please upload files so that we can understand your company better.

60. Business Plan or Executive Summary

Files submitted:

61. Financial Statements

Files submitted:

62. Organizational Chart

Select if you have a team structure chart you can share

Files submitted:

63. Product Catalog or Demo

Files submitted:

64. Any relevant visuals or branding docs

Files submitted:

65. Pitch Deck

Files submitted:

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