non-NSF SBIR prompted
NSF SBIR prompted
NSF SBIR process

Timeline		> 90 days - 90	- 90 days prior to deadline			– 60-30 days prior	– 4-2 weeks prior	- 4-2 days prior Deadline 3 weeks after the deadline	4-6 weeks after 3-4 months after 4-6 months after 6 months after		
ont Stage Customer Actions Pursue post-doc str	Studies Think about starting a company	See NSF SBIR ads Follow NSF SBIR on social media Attend events for fundraising.	Speak to NSF Staff  Sign up for newsletter (listserv)  Determine if company is a good fit.  Read technology topic areas  Research and figure out other awardees	Watch videos (i.e., archived webinars)  Register firm with NSF Fastlane (requires EIN, DUNS)  Read current solicitation.  Read FastLane submission guide.  Read funding criteria.	Click on link to view Phase I awards  Solicit pre-submission feedback (Executive Summary)	Attend webinar.  Read FAQs.  Apply for a DUNS number (requires EIN tax number)  Register entity with SAM.gov (requires EIN, DUN)	Begin to gather letters of support.  Enter information into FastLane  PI and Administrator certification  Call help desk	Submit proposal	Respond to email(s).  PI receives recommend or reject email.	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
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 (ToT) or Development of Technology Transfer office  Local Transfer of Technology (ToT) or Development of Technology Transfer office  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 website  NSF SBIR portfolio: https://www. nsf.gov/eng/iip/sbir/topics.jsp	NSF SBIR website / YouTube: https://www.nsf.gov/eng/iip/sbir/ Webinar/Phasel.jsp  Online: https://www.fastlane.nsf. gov/a0/about/registration.htm  NSF SBIR recent call: https:// www.nsf.gov/eng/iip/sbir/re- cent_call.jsp  NSF SBIR website: https://www. nsf.gov/eng/iip/sbir/fastlane1.jsp nsf.gov/eng/iip/sbir/fastlane1.jsp jsp	NSF SBIR website: https:// www.nsf.gov/awardsearch/ advancedSearchResult?ProgEle- Code=5371%2C1505&Boolean- Element=Any&ActiveAwards=true  Emails (PD contact info obtained from website)  Program Director receives an unsolicited email; prompts the for a summary.	NSF SBIR website (Discover through site, email signature, social media, listserv)  NSF SBIR website: https://www.nsf.gov/pubs/2017/nsf17029/nsf17029/spp  Online: https://fedgov.dnb.com/webform  Online: https://fedgov.dnb.com/portal/SAM/ registration	w.sbir.gov/ FastLane FastLane Phone	FastLane	Email Email	Award Cash Management \$ervice (ACM\$)	Email and/or phone  NSF SBIR: https://www.nsf.gov/ eng/lip/sbir/reporting.jsp  Award Cash Management \$ervice (ACM\$)
Other Actions	Apply for Employer Identification Number (EIN)							Applicant has to proactively log in to check status. Receives no notification.  Applicant has to proactively log in to check status. Receives no notification.  Applicant has to proactively log in to check status. Receives no notification.	Applicant has to proactively log in to check status. Receives no notification.  Applicant has to proactively log in to check status. Receives no notification.	Ask questions about drawing down funds.	Log in and submit through Research.gov: https://identity. research.gov/sso/UI/Login
ack Stage Systems & Processes	IRS			FastLane		WebEx  Dun & Bradstreet  System for Award Management (SAM)  Spiral System for Award Management (SAM)		FastLane sends an email that sounds like an acceptance, but it isn,Äôt.  Managed via e-jacket.	Managed via e-jacket  PI notified by email / status update whether proposal is recommended or rejected. Managed via e-jacket.  Proposals that have been recommended undergo multiple reviews from PD to Division Director, then 30 days to financial office. Managed via e-jacket.  Award letter sent to PI via e-jacket.		Award Cash Management \$ervice (ACM\$)
Other Actions		Soli	Solicitation posted			?? Check EIN and/or	Third-party contacts provide letters of support in writing.	NSF screens proposals. Propos- als that do not meet basic spec- ifications are returned without review (RWR)	d. External merit review begins.  Some applicants may get requests for addl. info. Long lead-time items not yet completed (e.g. human or animal subjects approvals, coop research agreements, etc.) should be expedited.	Email from Program Director Email from A	Amanda Email from Selda Email from Comms (Kelly) research.gov approval process Remaining funds released to customer.
Infrastructure, Partners & Networks				??		IRS IRS and/or D&B					
es	Starting a company needs to be unpacked a bit. (1) What prompted them to start a company? (2) Have they done some level of (a) market validation/customer development (b) product validation at this point? (3) Assumption that starting a company = getting EIN; (4) What other actions do they need to take in order to become a company? Starting a company needs to be unpacked a bit. (1) What prompted them to start a company? (2) Have they done some level of (a) market validation/customer development (b) product validation at this point? (3) Assumption that starting a company = getting EIN; (4) What other actions do they need to take in order to become a company?	Under what context would they see the adf What do we want them to do with the adds? What are the conversion metrics?  How does the target audience learn what context would they see the conversion metrics?  (1) There are no events or other time-based content on the site. (Even the submission deadlines to the buried.) (2) No system for managing contacts(1) There are no events or other time-based content on the site. (Even the submission deadlines to the buried.) (2) No system for managing contacts(1) There are no events or other time-based content on the site. (Even the submission deadlines tend to be buried.) (2) No system for managing contacts(1) There are no events or other time-based content on the site. (Even the submission deadlines tend to be buried.) (2) No system for managing contacts(1) There are no events or other time-based content on the site. (Even the submission deadlines tend to be buried.) (2) No system for managing contacts(1) There are no events or other time-based content on the site. (Even the submission deadlines tend to be buried.) (2) No system for managing contacts(1) There are no events or other time-based content on the site. (Even the submission deadlines tend to be buried.) 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Set for frequency landards or chained, Primary charmel for neithing was substantially report and interest the subscribers or collect any data based irright, 10% yearliers by troudest charmel, Primary charmel for forming may substantially or production five affiliation for five and interest the subscribers or collect any data based irright, 10% yearliers by troudest charmel, Primary charme net for orbiting may substantially or supplication five affiliation for five and five	(2) Need to Identify Principal Investigator (PII)(1) Takes 1-2 days Investigator (PII	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)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)	NSF SBIR is not allowed to conduct these until the solicitation has been posted. Registration captures email. SF SFIR is not allowed to conduct these until the solicitation has been posted. Registration captures email. SF SFIR is not allowed and the solicitation has been posted. Registration captures email. SF SFIR is not allowed to conduct these until the solicitation has been posted. Registration captures email. SF SFIR is not allowed to conduct these until the solicitation has been posted. Registration captures email. SF SFIR is not allowed to conduct these until the solicitation has been posted. Registration captures email. SF SFIR is not allowed to conduct these until the solicitation has been posted. Registration captures email. SF SFIR is not allowed to conduct these until the solicitation has been posted. SF SFIR is not allowed to conduct these until the solicitation has been posted. Registration captures email. 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SF SFIR is not allowed to conduct the solicitation is published. SF SFIR is not allowed to conduct the solicitation is	(1) Is there a template or a set of guidelines for this? (2) How is this currently submitted? (3) Can they submit soft copies? (4) Do the letters need to be notarized? (a) Can they submit soft copies? (4) Do the letters need to be notarized? (3) Can they submit soft copies? (4) Do the letters need to be notarized? 1e., how do you verify/ authenticate?  (4) Do the letters need to be notarized? 1e., how do you verify/ authenticate?  (5) Can they submit soft copies? (4) Do the letters need to be notarized? 1e., how do you verify/ authenticate?  (6) Can they submit soft copies? (5) Cowr Sheet (structured); Estimates Model (unstructured); Commercialization history / SBA Certification form (unstructured); Personnal (structured); Resumes / CVS (unstructured); Personnal (structured); Letters of Support (unstructured); Letters of	Usually takes about 1 week. Reasons for RWR: (1) Projects which were 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, but if it looks like if, Ais too much to have put on 15 pages, they will be returned; (3) Projects asking for significantly more than \$225,000 (4) Some projects which are completely missing a commercial discussion will get lieggment the states of the significant will be supported to the supported significant content, we will usually let leng go to panel, but if it looks like it's too much to have put on 15 pages, they will be returned; (3) Projects which are completely than \$225,000 (4) Some projects which are completely missing a commercial discussion will get flagged by the staff and returned.	Decisions are final. No protests. Äi but are allowed to submit another Phase I proposal. (1) Do appli- cants receive additional feedback on why they were rejected?De- cisions 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.20% of the money is withheld until the very end of the Phase I period upon receipt of the final report.	
Net value for customer			+ + + + + + + + + + + + + + + + + + + +	+ / / / / / / / / / / / / / / / / / / /	- +	+ /	+		- / +	/ + ?? ??	??
Net value for organization					+						?? + +