

Trinity Valley Small Business Development Center

Client Needs Assessment

Trinity Valley SBDC provides business growth resources to local entrepreneurs, startups and existing business owners. Please complete this brief assessment form so we can refer you to the best tools to fit you needs.

**First Name**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Last Name**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**E-mail**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Phone Number (xxx-xxx-xxxx)**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Website Address (if any)**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Are you in business now or are you looking to start a business?**

**\_\_\_\_ I am in business**

**\_\_\_\_ I want to start a business**

**\_\_\_\_ My business status is unclear**

**Does your home or business reside in one of the following counties?**

**\_\_\_\_ Anderson \_\_\_\_ Henderson \_\_\_\_ Kaufman**

**\_\_\_\_ Rains \_\_\_\_ Van Zandt \_\_\_\_ Other\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**What city is your business now or likely to be located?**

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**Briefly describe the type of business you are looking to start or grow.**

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**How much money do you need to start or grow your business?**

**\_\_\_\_ $0 - $1,000**

**\_\_\_\_ $1,001 - $5,000**

**\_\_\_\_ $5,001 - $10,000**

**\_\_\_\_ $10,001 - $25,000**

**\_\_\_\_ $25,001 - $50,000**

**\_\_\_\_ $50,001 - $100,000**

**\_\_\_\_ $100,001 - $250,000**

**\_\_\_\_ More than $250,001**

**\_\_\_\_ Unknown**

**How do you plan to finance the start-up or growth of your business? (Check all that apply)**

**\_\_\_\_ Savings - how much? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**\_\_\_\_ Family and/or Friends**

**\_\_\_\_ Investors**

**\_\_\_\_ Bank term loan/line of credit**

**\_\_\_\_ Retirement funds (i.e. 401K)**

**Do you have collateral that can be used to secure a loan if ever necessary?**

**\_\_\_\_ Yes**

**\_\_\_\_ No**

**\_\_\_\_ I don’t know**

**What is your credit score? (Note: If you don’t know you might consider visiting** [**www.creditkarma.com**](http://www.creditkarma.com)**)**

**\_\_\_\_ 750 or above**

**\_\_\_\_ 700-750**

**\_\_\_\_ 650-700**

**\_\_\_\_ 600-650**

**\_\_\_\_ Below 600**

**\_\_\_\_ I don’t know**

**How soon are you looking to start or grow your business?**

**\_\_\_\_ Less than 30 days**

**\_\_\_\_ 1 to 3 months**

**\_\_\_\_ 3 to 6 months**

**\_\_\_\_ 6 to 12 months**

**\_\_\_\_ 1 year +**

**\_\_\_\_ Unknown**

**Please describe the areas of assistance you are seeking from the Trinity Valley SBDC to start or grow your business.**

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**How did you hear about the Trinity Valley SBDC?**

\_\_\_\_ **Bank \_\_\_\_ Chamber \_\_\_\_ Client/Word of Mouth**

**\_\_\_\_ County/City Government \_\_\_\_ Internet Search \_\_\_\_ College/University**

**\_\_\_\_ Local Economic Development \_\_\_\_ SBA \_\_\_\_ SBDC**

**\_\_\_\_ Training Seminar \_\_\_\_ SCORE \_\_\_\_ Social Media/Blog**

**\_\_\_\_ Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Have you ever received any business assistance from any of the following? (Check all that apply)**

**\_\_\_\_ Trinity Valley SBDC**

**\_\_\_\_ Dallas Metropolitan SBDC**

**\_\_\_\_ Center for Government Contracting**

**\_\_\_\_ International SBDC**

**\_\_\_\_ SCORE**

**\_\_\_\_ Independent Business Consultant**

**\_\_\_\_ None**

**\_\_\_\_ Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**