

# Business Technical Assistance Plan

This plan reflects information gathered during client interviews

TA Planner Name(s): \_\_\_\_\_

Business & Owner Name(s): \_\_\_\_\_

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## Owner or Employee Education/Training

<u>TA Questions</u>	<u>Planned</u>	<u>Done</u>	<u>Declined</u>	<u>TA Program/ Provider Recommended</u>
What is your experience in this industry?	_____	_____	_____	_____
What is your experience in the target market?	_____	_____	_____	_____
What is your experience in market development?	_____	_____	_____	_____
Who are your target customers?	_____	_____	_____	_____
Who are your competitors?	_____	_____	_____	_____
What is your business management experience?	_____	_____	_____	_____
Are you the primary producer in this business?	_____	_____	_____	_____
Who do you call if you have business questions?	_____	_____	_____	_____

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## Operations

<u>TA Question</u>	<u>Planned</u>	<u>Done</u>	<u>Declined</u>	<u>TA Program/Provider Recommended</u>
What is your experience in employee management such as hiring, training and/or firing?	_____	_____	_____	_____
What is your experience in prod/service delivery?	_____	_____	_____	_____
What is your experience in quality control?	_____	_____	_____	_____
What is your experience in record management?	_____	_____	_____	_____
What is your experience in pricing and costing?	_____	_____	_____	_____
What is your experience in profitability analysis?	_____	_____	_____	_____
What is your experience in market analysis?	_____	_____	_____	_____

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## Outside Advisory Team

<u>TA Question</u>	<u>Planned</u>	<u>Has</u>	<u>Declined</u>	<u>TA Program/Provider Recommended</u>
Who is your attorney?	_____	_____	_____	_____
Who is your banker?	_____	_____	_____	_____
Who is your CPA/Accountant/Bookkeeper?	_____	_____	_____	_____
Who is assisting you with location selection?	_____	_____	_____	_____
Who is your Insurance/Bonding agent?	_____	_____	_____	_____
Who is helping you with Marketing?	_____	_____	_____	_____
Consultant: _____	_____	_____	_____	_____
Contractor: _____	_____	_____	_____	_____

**Business Technical Assistance Plan Continued**

**Funding**

Business Name: \_\_\_\_\_

<u>TA Question</u>	<u>Planned</u>	<u>Done</u>	<u>Declined</u>	<u>TA Program/Provider Recommended</u>
Have you applied for any city grants?	_____	_____	_____	_____
Do you need assistance with credit issues?	_____	_____	_____	_____
Does your current loan need restructuring?	_____	_____	_____	_____
What is your funding requirement?	_____	_____	_____	_____
____ Micro Loan Program    ____ Other Gap Financing Source    ____ SBA Guarantee    ____ Commercial Bank Loan				
Do you have a business plan?	_____	_____	_____	_____
Does your plan include financial projections?	_____	_____	_____	_____

**Location Planning**

<u>TA Question</u>	<u>Planned</u>	<u>Done</u>	<u>Declined</u>	<u>TA Program/Provider Recommended</u>
What do you like about the area?	_____	_____	_____	_____
Why do you think this area is good for your business?	_____	_____	_____	_____
Have you encountered any issues with Licensing & Permits?	_____	_____	_____	_____
Have you encountered any issues with Zoning?	_____	_____	_____	_____
Do you need assistance in Site Selection?	_____	_____	_____	_____
Is area security a concern for your business?	_____	_____	_____	_____
What Market/Customer analysis do you base your location selection decision on?	_____	_____	_____	_____

**Other/Comments**

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