Client Intake Form

Date: _____ Time: _____ CEO Staff: _____

Startup Company Information

Working Project Name: [ ]

Please give a **general description** of startup:

[ ]

Team Lead Entrepreneur

First Name: _____ **Last Name:** _____

Email Address: _____ Cell Phone: _____

University Affiliation: ○ Student ○ Faculty ○ Staff ○ Community Member

MSU NetID: _____ Major: _____ Grad Mo/Yr: _____

Role: ○ Business/Sales/Marketing ○ Maker/Programmer ○ Creative/Artistic **Gender:** ○ Male ○ Female

Ethnicity: ○ Am Ind ○ Asian ○ Blk/Afr Am ○ Hisp/Lat ○ Indian ○ Multi ○ Haw/Pac Isl ○ White ○ Unk/Other

Entrepreneur #2 (if applicable)

First Name: _____ **Last Name:** _____

Email Address: _____ Cell Phone: _____

University Affiliation: ○ Student ○ Faculty ○ Staff ○ Community Member

MSU NetID: _____ Major: _____ Grad Mo/Yr: _____

Role: ○ Business/Sales/Marketing ○ Maker/Programmer ○ Creative/Artistic **Gender:** ○ Male ○ Female

Ethnicity: ○ Am Ind ○ Asian ○ Blk/Afr Am ○ Hisp/Lat ○ Indian ○ Multi ○ Haw/Pac Isl ○ White ○ Unk/Other

Entrepreneur #3 (if applicable)

First Name: _____ **Last Name:** _____

Email Address: _____ Cell Phone: _____

University Affiliation: ○ Student ○ Faculty ○ Staff ○ Community Member

MSU NetID: _____ Major: _____ Grad Mo/Yr: _____

Role: ○ Business/Sales/Marketing ○ Maker/Programmer ○ Creative/Artistic **Gender:** ○ Male ○ Female

Ethnicity: ○ Am Ind ○ Asian ○ Blk/Afr Am ○ Hisp/Lat ○ Indian ○ Multi ○ Haw/Pac Isl ○ White ○ Unk/Other

Product (Real)

What kind of product or service is this (check all that apply)?

○ Hardware ○ Software ○ Service ○ E-Commerce ○ Brick & Mortar

Current State of Development:

○	○	○	○	○	○	○
TRL 1 Simply Idea	**TRL 2** Design Concepts	**TRL 3-4** Working components	**TRL 5** "Frankenstein" Prototype	**TRL 6-7** Working Prototype	**TRL 8** Prototype in Testing	**TRL 9** Product in Field

If not at TRL 8/9, what it would take to get there (who/how/time/cost):

Market Size and Sales Strategy (Worth)

Who is the target customer segments? What is the value proposition?

If you captured all of the market reasonably possible, how much would it be:

○ $100k ○ $1M ○ $10M ○ $100M ○ $1B ○ $10B ○ >$10B

How will it be sold and promoted?

Competition (Win)

What is the "status quo"? How do people address this problem now?

Team Direction / Action Items

FOR INTERNAL USE:

Meeting Checklist

- ☐ **Discuss the idea. Triage.**
- ☐ **Points to Consider**
  - ☐ Real / Win / Worth
  - ☐ Can we pivot or somehow make this BIGGER?
  - ☐ Timelines with graduation
- ☐ **Discuss Programs & Offerings**
  - ☐ VentureCatalyst
  - ☐ RSL Go
  - ☐ eClub
  - ☐ Destination Innovation
  - ☐ Facilities / Idea Shop
- ☐ **Discuss Next Steps**

Client Type

- ○ Non-MURA (No University IP)
- ○ MURA (University owns IP)
- ○ Non-MSU (External Client)

Program

- ○ VentureCatalyst
- ○ RSL
- ○ NSF I-Corps

Target PREP Date: _____

Target ECAB Date: _____

Staff Follow-ups / Action Items

_____

_____

_____

_____

_____

_____

_____

_____

ZohoCRM / Data Entry:

- ☐ Contact created / updated
- ☐ Add Contact to Canvas Course
- ☐ New Startup Project created.
- ☐ Create SCS Check-in with a summary of action items
- ☐ Scan and Attach this to Startup Project

Staff Signature:

_____

Date: _____