



Client Assessment Score Sheet | BA Grant Level 2

To be used in assessing client's current status and needs

New Score	Old Score	Client Name:	Date:	Comments
		Original Intake Date:	ES TM:	
		Problem/Solution Statement		
		1: Has difficulty articulating problem being solved 2: Statements are full of jargon and technical terms 3: Understandable with some probing 4: Most people could understand problem/solution statement 5: Clearly and concise w/problem/solution/customer alignment		
		Value Proposition		
		1: Cannot articulate value 2: Suggests VP, but not tied to specific customer 3: Seemingly good but without customer validation of value proposition 4: Clear with some customer validation 5: Clearly expressed with strong customer validation		
		Understanding Of Customer Discovery (CD)		
		1: Cannot clearly state who the buyer is; no customer validation of idea 2: Defines customer very broadly; has done no CD 3: Has defined preliminary customer, done some CD 4: Has done enough CD to validate basic hypotheses 5: Extensive CD; continues to evolve based on customer feedback		
		Competitive Understanding		
		1: Unaware of competition 2: Has identified direct competitors 3: Understands current competition but may underestimate threats 4: Has identified direct and indirect competition, relative strengths 5: Has done extensive competitive analysis and knows how to position		
		Stage of Product Development		
		1: At the idea stage 2: Has started development 3: Has prototype 4: At pilot or beta stage 5: Post revenue with product		
		Business Documentation/Financial Analysis		
		1: Hasn't written anything down, no financials 2: Has written summary of idea, some data, initial price/cost 3: Has basics of a business plan or exec summary, basic financials 4: Has most needed documentation inc. fin'l forecast; may need polishing 5: Well written Exec Summ, vetted 3-5 yr income projection; cash flow; B/S		
		I/P Protection		
		1: Has not considered IP protection 2: No action taken to date; may be looking for help 3: Has discussed with patent agent or attorney 4: Has plan to protect proprietary tech and/or provisional patent applied for 5: Patent(s) has been issued		

Comments

		Business Model		
		1: Has not thought through 2: Initial idea business model or is considering alternatives 3: Has plan for making money 4: Solid business model validated by customer discovery 5: Model proven with paying customers		
		Milestone Planning		
		1: Has not identified work to be done 2: Has vague notion of milestones to hit 3: Has identified major milestones but may not have tied to funding 4: Logical plan for getting to revenue 5: Has a clear plan; knows what's needed to achieve milestones		
		Team Makeup		
		1: Unformed or very loose 2: Entrepreneur looking for team members 3: Basic team formed with roles generally defined 4: Fairly solid team; may have openings in key positions 5: All key positions identified; strong/diverse outside advisors		
		Go-To-Market Strategy		
		1: Has not thought past showing it to the customer 2: Lacks awareness of sales cycle, market distribution, etc. 3: Has preliminary strategy, but needs to better understand customer process 4: Basic understanding of buying process; developing plan to sell 5: Understands buying process and has clear plan to launch and grow		
		Readiness For Investment		
		1: Not ready 2: Thinking about pitching 3: Has received some FFF funding; may be getting pitch coaching 4: Actively pitching to raise funds 5: Has already received at least one round of outsider funding		
0	0	Total Score*		
New	Old			

**Only relevant to assess progress over time, not for comparison to other companies*

Comments & Recommendations:

Other considerations for approval of additional services: