

New Client Checklist

Welcome to Chandler Innovations! Here are next steps to get you fully onboarded. Please do these as soon as possible.

- Let us know you if you are accepting the offer to be in the program
- Mark your calendar for the session times if you are in Track 1 or 2 and start attending
- Schedule a time to meet with us for onboarding on a Tuesday or Thursday. If you are in Track 1, you will meet with the program manager, Jody Owen, and if you are Track 2 or 3, you will meet with the entrepreneur-in-residence, Tom Fulcher. Please save these links.
 - a. Jody's link: <https://calendly.com/jowen-1>
 - b. Tom's link: <https://calendly.com/eirtfulcher>
- Email a very short 1-2 sentence blurb about your business so we can get you up on our website on the clients' page. You can go here to get an idea of what that looks like. <https://innovationsincubator.com/clients/>
- Email your logo
- Check out, bookmark and register for upcoming events/speakers here: <https://innovationsincubator.com/events-2/>
- Whitelist our mailchimp emails in your browser
- Review the Agreement and bring 2 signed copies with you to the onboarding session
- For Track 2 and 3 clients only, sign up for your free Chandler Chamber of Commerce membership here. Just let them know you are in our program and your fee is waived. <http://business.chandlerchamber.com/member/newmemberapp>
- Check out the FAQ page here: <https://innovationsincubator.com/about/faqs/>
- Like our Facebook page: [@chandlerinnovationsincubator](https://www.facebook.com/chandlerinnovationsincubator)
- Follow our Twitter: @GrowChandler
- Update company information in our incutrack system: After our initial meeting, you will be set up as a User in our system and an email will come to you to complete your company information. Information that you submitted through the application will automatically drop in, but there are still some holes that the application doesn't capture, such as if you are a veteran, woman-owned business, number of employees upon entry to the program, NAICS code, state and federal employer id's, etc. Please complete the info on the first 3 tabs and then also let us know if there are any other people that you are closely working with at this stage in your company.

Because we report metrics to the city on our client businesses quarterly, you are also required to submit your answers to the following questions within a 10-day window just after the end of each quarter. For instance, for the quarter January-March, the window will be open April 1-10 for reporting. You will receive email reminders of the upcoming reporting period each time, with instructions and a link to our software where you will report online.

This is a very crucial part of maintaining our sponsorship with the city and we appreciate your participation on a timely basis each quarter. Feel free to pass this information on to your bookkeeper or others that may be to gather information to answer these questions. If you are just starting, you may not have anything to report as far as income or staff, but we need your report anyway. You will just enter none or "0" as appropriate.

The questions that you will be asked are:

FINANCIAL INFORMATION

- How much money did you make (gross revenues before expenses) from July 1, 2016 to June 30, 2017?
- How much money did you make (gross revenues before expenses) last quarter? (Enter "0" if you did not make any money)

- How much money did you raise from investors last quarter? (Enter "0" if you did not raise any money from investors)
- Please list the sources and amounts from each source for the money raised from investors. (Enter "none" if you did not receive money from investors)
- How much money were you awarded from grants last quarter? (Enter "0" if you did not receive any money from grants)
- Please list the sources and amounts from each source for the money awarded from grants. (Enter "none" if you did not receive money from grants)

EMPLOYMENT INFORMATION

- How many full-time (FT) employees do you have? (include 1 for the Founder, whether paid or not)
- How many full-time (FT) employees did you add last quarter?
- How many full-time (FT) employees did you lose last quarter?
- Please list the FT positions gained or lost, and the reasons why, for employees lost (Enter "none" if you have not lost any FT employees)
- What is the average annual salary for your full-time (FT) employees? (Enter "0" if you do not have FT employees)
- How many part-time (PT) employees do you have?
- How many part-time (PT) employees did you add last quarter?
- How many part-time (PT) employees did you lose last quarter?
- Please list the PT positions gained or lost, and the reasons why, for employees lost (Enter "none" if you have not lost any PT employees)
- What is the average hourly wage for your part-time (PT) employees? (Enter "0" if you do not have PT employees)
- How many student interns are currently employed?
- Please list the benefits you offer your employees (Enter "none" if you do not offer benefits)

GENERAL INFORMATION

- How many 1:1 meetings did you have with CI staff, including the entrepreneur-in-residence, last quarter? (not Mentors/Advisors) (Enter "0" if you did not have any meetings with staff)
- How many 1:1 meetings did you have with Mentors/Advisors last quarter? (not CI staff) (Enter "0" if you did not have any meetings with Mentors/Advisors)
- What do you need help with in the next quarter?
- Please share any accomplishments, updates, awards, press releases, articles, interviews, etc. for the last quarter (please include links)
- How much square footage of commercial space do you lease/own? (enter whole number only and "0" if you do not lease commercial space)
- Is your company looking for space?
- Are you planning to exit your company in the next six months?
- If you are planning to exit your company, please explain.
- Is your company preparing to undergo a merger, acquisition or closure in the next six months?
- If your company is preparing to undergo a merger, acquisition or closure, please explain.
- If your company has moved in the last reporting period, please provide your new address

We are looking forward to supporting you and helping your business grow!