

2017 WBC Client Information

Client First Name	Client Last Name	Email Address	Telephone Number	Telephone Extension	Mailing Address 1	Mailing Address 2	City	State	Zip Code	Client Status ("Pre-venture" or "In-business")	Gender	Race/Ethnicity
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2017 WBC Client Information - Training Clients Only

Client First Name	Client Last Name	Email Address	Telephone Number	Telephone Extension	Mailing Address 1	Mailing Address 2	City	State	Zip Code	Client Status ("Pre-venture" or "In-business")	Gender	Race/Ethnicity
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General Instructions:

This Excel spreadsheet includes tabs with instructions to generate the requested client data. Please use the version of client data, as described below.

- If your WBC uses Outcome Tracker to record and maintain OWBO client data, please use the instructions in tab titled, Outcome Tracker.
- If your WBC uses Salesforce, Neoserra, a host-provided database, or another Customer Relationship Management (CRM) system, please use the instructions in tab titled, Other System Instructions.
- If your WBC uses Excel or another non-CRM client management process, please use the instructions in tab titled, Excel Instructions.

To meet our survey objectives, we respectfully ask that you submit the requested file(s) via email to [EMAIL] by [DATE].

According to the Paperwork Reduction Act of 1995, an agency may not conduct or sponsor, and a person is not required to respond to, a collection of information unless it displays a valid OMB control number. The valid OMB control number for this information collection is XXX-XXXX. The time required to complete this information is estimated to average 15 minutes per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to: U.S. Small Business Administration, Paperwork Reduction Project (XXX-XXXX), 4000 Reservoir Road, NW, Washington, DC 20416 and Desk Officer for the Small Business Administration, Office of Management and Budget, New Executive Plaza North, Room 1015, Washington, DC 20503.



OMB Number: XXXX-XXXX

Expiration Date: XX/XX/XXXX

Outcome Tracker Instructions:

These instructions are for WBCs that use Outcome Tracker (OT) to manage client data. If you store both counseling and training requested data can be provided by following the Steps 1-4 listed below. If you store 2017 training client data elsewhere, see S transfer your output/export into the "WBC Client Data Template" and "WBC Client Data Template_Train" (if applicable) tabs, below.

Steps for Generating the Requested Data

1. In OT, select the premade query "OWBO Annual Survey Client Information" by going to the "Reports" tab, selecting the "WBC/SBDC."
2. Select the appropriate fields from the input screen based on how your data are organized and click GO. Specifically:
 - a. For the dates, leave the default values of January 2017 to December 2017.
 - b. For the "role" input, select the role(s) that your WBC has assigned to SBA/OWBO clients.
 - c. For the "activity type," select the activity type(s) that your WBC has assigned to counseling or training events included on Form 641 or Form 888. Note that your WBC may use other names for these activities, such as "consulting" names to indicate training or counseling, please choose those.
3. Verify the information in the query output screen to ensure it reflects the data that are stored in your system. If the results variable (e.g., there are no dates in date of first service), or missing data for clients that you know you have entered into the system activities you selected. Otherwise, if the results appear correct, choose the "Export" button at the bottom of the "results" page. Exported file downloads to the default location in your web browser.
4. If feasible, please transfer your output/export into the "WBC Client Data Template" tab, otherwise save and rename the file (e.g., "Annual Survey Client Information NYWBC").

If your training clients are not maintained in OT, continue to Step 5; otherwise, skip Steps 5 and 6:

5. Training clients are those clients whom you count in a Form 888 submission to SBA/OWBO. Per SBA protocol, you must have a Form 888 event submission. We acknowledge that you are not required to collect individual data from clients as part of your Form 888 submission. If you have the following client attendee data for one or more training events held in calendar year 2017, please compile it in Microsoft Excel:
 - a. Client first and last name
 - b. Client email
 - c. Client phone number
 - d. Client mailing address
 - e. Business status (pre-venture or in-business) - if a client received service on more than one date in 2017, provide the date
 - f. Gender (if available)
 - g. Race/ethnicity (if available)
6. If feasible, please transfer your output/export into the "WBC Client Data Template_Train" tab, otherwise save and name the file (e.g., "Training_NYWBC").

Other System Instructions:

These instructions are for WBCs that use Salesforce, Neoserra, a host-provided database, or another Customer Relationship Management system. If you store both counseling and training client information from calendar year 2017 in your CRM, the requested data can be provided from your CRM. If training client data elsewhere, see Steps 5 and 6 after completing steps 1-4. If feasible, please transfer your output/export into the "WBC Client Data Template_Train" (if applicable) tabs, otherwise please save the file according to the instructions below.

Steps for Generating the Requested Data

1. In your CRM database, identify SBA/OWBO clients who received training or counseling during calendar year 2017. Counselors should use Form 641 or Form 888. Note that your WBC may use other names for these activities, such as "consultation" or "technical assistance." List all SBA/OWBO clients.
2. Identify the following fields in your CRM database. (If you maintain both counseling and training clients in your database, list both types of clients, but we acknowledge you may only collect the nonbolded fields for counseling clients.)
 - a. **Client first and last name**
 - b. **Client email**
 - c. **Client phone number**
 - d. Client mailing address
 - e. Business status (pre-venture or in-business) - if a client received service on more than one date in 2017, provide all dates.
 - f. Gender (if available)
 - g. Race/ethnicity (if available)
3. Output or export the information in Step 2 for the clients identified in Step 1 to Microsoft Excel or similar software. If there are no duplicate clients, choose this option.
4. If feasible, please transfer your output/export into the "WBC Client Data Template" tab, otherwise save and name the file with the WBC in the document title (e.g., "CenterIC_NYWBC").

If training clients are not maintained in your CRM database, continue to Step 5; otherwise skip Steps 5 and 6:

5. Training clients are those clients whom you count in a Form 888 submission to SBA/OWBO. Per SBA protocol, you must have Form 888 data submission. We acknowledge that you are not required to collect individual data from clients submitted as part of your Form 888 submission. format, the following client information for one or more training events held in calendar year 2017, please compile those lists:
 - a. Client first and last name
 - b. Client email
 - c. Client phone number
 - d. Client mailing address
 - e. Business status (pre-venture or in-business) - if a client received service on more than one date in 2017, provide all dates.
 - f. Gender (if available)
 - g. Race/ethnicity (if available)
6. If feasible, please transfer your output/export into the "WBC Client Data Template_Train" tab, otherwise save and name the file with the WBC in the document title (e.g., "Training_NYWBC").

Excel Instructions:

These instructions are for WBCs that do not use a database to manage client data, but instead use software such as Microsoft Excel to submit data to SBA/OWBO. One client list should contain counseling clients and the second list should contain training clients. If feasible, please save the file as "WBC Client Data Template" and "WBC Client Data Template_Train" tabs, otherwise please save the file according to the instructions below.

Steps for Generating the Counseling Client List

1. In your data, identify clients that received any amount of counseling assistance in calendar year 2017. Counseling clients should be included in your submission to SBA/OWBO. Include the following information, as requested on Form 641, for the clients you identified.
 - a. Client first and last name
 - b. Client email
 - c. Client phone number
 - d. Client mailing address
 - e. Business status (pre-venture or in-business) - if a client received service on more than one date in 2017, provide the date of service
 - f. Gender (if available)
 - g. Race/ethnicity (if available)
2. If feasible, please transfer the requested data into the "WBC Client Data Template" tab, otherwise save and name the file according to the instructions below in the document title (e.g., "Counseling_NYWBC").

Steps for Generating the Training Client List

1. Training clients are those clients whom you count in a Form 888 submission to SBA. Per SBA protocol, you must have a paper data submission. We acknowledge that you are not required to collect individual data from clients submitted as part of your Form 888 submission for one or more training events held in calendar year 2017 to the extent that it was collected in electronic format.
 - a. Client first and last name
 - b. Client email
 - c. Client phone number
 - d. Client mailing address
 - e. Business status (pre-venture or in-business) - if a client received service on more than one date in 2017, provide the date of service
 - f. Gender (if available)
 - g. Race/ethnicity (if available)
2. If feasible, please transfer the requested data into the "WBC Client Data Template_Train" tab, otherwise save and name the file according to the instructions below in the document title (e.g., "Train_NYWBC").