

## Investment Promotion Client Intake Questions

### **Client Profile Questions**

- What is the primary industry focus of the company?
  - If known, what is the NAICS industry code?
- What products or services does the company offer?
- What is the company's business model (customers, channels of distribution, key partners)?
- Does the company have offices, manufacturing facilities, or other investments outside of their home country?
  - If so, in which other countries?
  - If in the United States, what is the size/nature/history of the U.S. facility or office?
- What are the company's annual sales?
- How many employees does the company have (country/worldwide)?
- Does the company export?
  - To which countries? Does it export to the United States? Does it have a geographic focus in the United States?
  - Does the company distribute directly abroad or does it use wholesaler/distributors? In the United States?

### **Investment Objective Questions**

- What is the investment type (greenfield, M&A, expansion, retention)?
- What is the business objective of the investment decision (sales office, manufacturing, R&D, corporate HQ relocation, other(s))?
- Has the company already started an investment process in the United States?
  - If so, where, and what type of investment?
  - If not, is the company considering multiple countries and/or U.S. states for their investment? Can they disclose which countries and/or U.S. locations?
- What is the timeline of the investment?
- What is the motivation behind the investment decision?
- What are the goals of the investment?
- Is there an estimate of the total value of the investment and number of jobs that will be created and/or retained?
- Who is the primary decision maker?
- What are the location-selection factors associated with the investment decision?

### **Client Services Questions**

- Is there a specific objective that SelectUSA/US&FCS can help the company achieve, or need that we can help address?
- Does the company have any questions about the U.S. system of government and regulations associated to its investment?
  - What Federal agency or office is the company interested in learning more from?
  - What previous interactions has the company had with the interagency related to their inquiry?

- Does the company require any support in engaging with a specific federal, state or municipal entity for the first time, or in an ongoing process?
- Does the company know about the different economic development partners and programs that can support their investment at the federal, state and municipal level?
- Does the company require any specific information regarding the U.S. market?

### **Research and Data Questions**

- What are the key factors influencing the company's decision of where to locate the investment?
- What is the client's geographic scope for their investment?
- Are there any other data points in which the client has indicated interest?

### **For Entrepreneurs**

- How has access to a mentorship network factored in your growth as an entrepreneur?
- What obstacles have you had to overcome to start a business or expand in the United States?
- What have you found has made your investment journey easier?
- Can you please provide a brief overview of your business?
- Where you are in your U.S. investment journey?
- What region is your business located?
- Can you share any obstacles you have faced in securing funding as an entrepreneur?
- What successes have you experienced in developing your network of supporters?
- What traits or attributes in a prospective investor? (e.g. a social impact mission, experience with your market or industry)

### **For VCs or Mentors**

- Have you had a mentor who supported your career growth? If so, can you share more about how your mentorship relationship impacted your life?
- Can you please share your top considerations when deciding to make an investment?
- What areas of the pitching/funding process do you find more challenging for female entrepreneurs?
- What areas of the pitching/funding process do you find more challenging for entrepreneurs?
- How are you working to alleviate or address roadblocks for startups and particularly women-led startups, seeking capital for their company's growth?
- How are you working to alleviate or address roadblocks for companies and start-ups seeking capital for their company's growth?
- Do you have any insights or best practices to share with female entrepreneurs to assist them with accessing sources of funding?
- Do you have any insights or best practices to share with entrepreneurs to assist them with accessing sources of funding?
- How does working with the U.S. Department of Commerce advance your goals?
- How can we better incorporate venture capitalists, accelerators, and other tech ecosystem partners in SelectUSA programming?
- What activities comprise your lead generation strategies?
- How do you approach lead generation and pipeline development?

### **General**

- What do you hope to gain from your mentorship relationship?

- What do you hope to gain from your participation in Select Global Women in Tech (SGWIT) or SelectUSA Tech?
- What do you hope to gain from your participation in SelectUSA Investment Summit?
- What do you hope to gain from your participation in SelectUSA programming?
- How can the U.S. Department of Commerce help you and for other female founders to start a business or expand their business in the United States?
- How can the U.S. Department of Commerce support international female tech founders start a business or expand their business in the United States?
- How can the U.S. Department of Commerce help tech companies and start-ups to start businesses or expand their businesses in the United States?
- What topics would you recommend SelectUSA cover in future Select Global Women in Tech programming?
- What topics would you recommend SelectUSA cover at a SelectUSA Investment Summit?
- What global trade events would you like to see SelectUSA present at?
- What trade shows or events are you considering in attending?

#### **General - Tech**

- How can the U.S. Department of Commerce help companies and startups looking to enter the U.S. technology ecosystem?
- What topics would you recommend SelectUSA cover in future SelectUSA Tech programming?
- How has attending the SelectUSA Investment Summit helped your business?
- Have you invested in a company that you met at the SelectUSA Investment Summit?
- Have you invested in a company that you met through SelectUSA or the U.S. Department of Commerce?