SBDC PENNSYLVANIA

Small Business Development Centers
Helping businesses start, grow, and prosper.

Technology Client Intake Form

Date	
Company Name	
Contact	
Phone	
Email	
Product Name	

PRODUCT

1. Briefly describe technology - new product, invention, process (attach product literature, drawing, or photos as needed)

2. Briefly describe the problem that the technology solves and its advantages/benefits relative to competing technologies or products. What are the novel aspects of the invention? Are there new market drivers that are encouraging you to develop this product? – if so please identify.

3. Stage of development?

   ◻ Concept ◻ Working Model ◻ Prototype
   ◻ Proof of concept ◻ Demo ◻ Fully developed

   Are samples and/or prototypes available to share with potential industry partners?

   ◻ Yes ◻ No

4. Do you have a completed business plan which focuses on this new product/process opportunity:

   ◻ Yes ◻ No

MARKET

5. Please list the major market/s that you are hoping to target with this innovative product/process? (e.g. Robotics, Pharmaceutical-drug discovery)

   _____

COMPETITION

6. Please list the major Companies and their respective product or process that are currently providing a competitive offering

Competitor	Product / Process

7. What are your product's strengths and weaknesses compared to the competition?
   Strengths Weaknesses

INTELLECTUAL PROPERTY

8. Please check the box that best describes where this product/process is in the patent process.
   - □ provisional patent application filed Date: _____
   - □ conventional patent application filed Date: _____
   - □ patent application approved Date: _____
   - □ not applicable/haven't started patent process.

9. Have you publicly disclosed this invention in one of the following: seminar presentation, poster session, publication, thesis defense or corporate presentation?

   - □ Yes – please describe
   - □ Yes, however under NDA or confidentiality agreement
   - □ No

10. What is the status of the intellectual property as it relates to this invention/discovery?

    - □ will be individually owned
    - □ owned by and placed into a newly formed company
    - □ owned by a college/university – licensed to a company
    - □ unknown – not certain at this point
    - □ other – please describe _____

PROJECT FUNDING/FINANCING

11. What are the initial project costs estimated to commercialize this product/invention?
    - □ $0 – 500,000 □ $500,001 -$1,000,000 □ > $1,000,000
    - □ Unknown or undefined at this time

12. If the answer to Q-11 was any response OTHER than "Unknown or undefined" – what sources or start up financing have you or would you like to consider?
    - □ None, project will be privately funded
    - □ SBIR/STTR
    - □ Angel investment
    - □ Venture Capital
    - □ Private investment
    - □ Joint Venture/Industry Partnership
    - □ Other – please describe _____