



OKNABEC CLIENT PROFILE

A Program Federally Funded by the
U.S. Department of Commerce
Minority Business Development Agency
(MBDA)

Personal Information of Owner

First Name: _____ Last Name: _____ Email Address: _____

Phone Number: (____) _____ - _____ ext. _____ Cell Phone: (____) _____ - _____

Primary Contact for OKNABEC, if different from owner:

First Name: _____ Last Name: _____ Email Address: _____

Phone Number: (____) _____ - _____ ext. _____ Cell Phone: (____) _____ - _____

Business Information

Company Name: _____ Website: _____

Company Physical Address: _____ City: _____ State: _____ ZIP: _____

Company Mailing Address: _____ City: _____ State: _____ ZIP: _____

County: _____ Company Phone: (____) _____ - _____ Fax: (____) _____ - _____

Minority Affiliation

Individuals eligible for assistance are: (Indicate your ethnicity.)

- Native American Alaskan Native Hispanic American Aleuts Hasidic Jew
- Asian Pacific American Asian Indian African American Puerto Rican Other Minority

Service Disabled Veteran: YES NO Business Start Date: (Month, Day, Year) _____/_____/_____

Business Type:

- Limited Liability Partnership Sole Proprietorship American Indian Tribe Other For-Profit
- Limited Liability Co. (LLC) "C" Corporation Other Non-Profit Partnership
- Subchapter "S" Corporation State Government Entity Local Government Entity College/University

Business Description: (25 words or less)

Keywords: (What keywords best describe your product or service? 10 words or less)

Number of Employees: NOTE: A BUSINESS OWNER IS NOT CONSIDERED AN EMPLOYEE OF A BUSINESS

FULL-TIME: _____ PART-TIME: _____ MINORITY: _____

Annual Sales \$ _____ Annual Export Sales \$ _____

Is your company registered with CCR? YES NO

DUNS number: _____ Cage Code: _____

Value of largest single contract sale in the past 3 years \$ _____

NAICS Codes (North American Industry Classification System): (up to ten)

Primary Code (1) _____ (2) _____ (3) _____ (4) _____ (5) _____
(6) _____ (7) _____ (8) _____ (9) _____ (10) _____

Do you have any contracting or minority certifications? <i>Example: 8(a), SDB, City of Tulsa, OMSDC, ODOT, TERO, etc.</i>	Date		Date
U.S. Small Business Administration (SBA) 8(a) Business Development		Small Disadvantaged Business (SDB)	
Oklahoma Minority Supplier Development Council (OMSDC)		Historically Underutilized Business Zone (HUBZone)	
Oklahoma Department of Transportation (ODOT), Disadvantaged Business Enterprise (DBE)		Service-Disabled Veteran	
Building Resources in Developing And Growing Enterprises B.R.I.D.G.E		Tribal Employment Rights Office (TERO)	

Scope of Services

Indicate the services/assistance you are interested in receiving:

Procurement		Finance		Management	
City and State Opportunities		Bonding		Marketing and Networking	
Construction Opportunities		Business Plan		Minority Certification Assistance	
Federal Opportunities		Financial Analysis		Process Improvement	
Tribal Opportunities		Loan Packaging		Strategy Design and Implementation	

Do you wish to participate in the Phoenix and Opportunity matching system? Yes No

The System will match contracting opportunities to your business based on your information, e.g. operating locations, industry codes (NAICS), and keywords.

I, the undersigned applicant, understand that this application is part of a screening process required by the U.S. Department of Commerce, Minority Business Development Agency (MBDA) to determine my firm's eligibility for services. I further understand that the acceptance of my application by the OKNABEC does not constitute a promise to provide services.

(Signature of client)

(Date)

Notes:

Completed by OKNABEC:	Received on:	Received by:
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Please circle your answers from (1) completely **DISAGREE** to (10) completely **AGREE**.

QUESTION	ANSWER									
Customer	Disagree					Agree				
Everyone in this organization knows how to create maximum value for customers.	1	2	3	4	5	6	7	8	9	10
We have an ideal mix of new and old product/services.	1	2	3	4	5	6	7	8	9	10
Our customers would agree that our quality couldn't be better.	1	2	3	4	5	6	7	8	9	10
We have a lot of customers and are not highly dependent on any one of them.	1	2	3	4	5	6	7	8	9	10

QUESTION	ANSWER									
Strategy	Disagree					Agree				
My business has a clearly-defined strategy.	1	2	3	4	5	6	7	8	9	10
Everyone who is involved in implementing the strategy fully understands it and agrees with it.	1	2	3	4	5	6	7	8	9	10
We know exactly what we need to do to grow the business.	1	2	3	4	5	6	7	8	9	10
We have planned well for what we need to do in a business downturn.	1	2	3	4	5	6	7	8	9	10
This business is very flexible; we adapt easily to change.	1	2	3	4	5	6	7	8	9	10
We are able to respond more quickly than our competitors to new opportunities and challenges.	1	2	3	4	5	6	7	8	9	10
This business has achieved a competitive advantage over its rivals.	1	2	3	4	5	6	7	8	9	10
The long-term future of this business is fully planned out.	1	2	3	4	5	6	7	8	9	10

QUESTION	ANSWER									
Processes	Disagree					Agree				
We have analyzed and perfected our key work processes.	1	2	3	4	5	6	7	8	9	10
We are a lean enterprise; we have eliminated everything that doesn't create value for customers.	1	2	3	4	5	6	7	8	9	10
Every worker is dedicated to continuous improvement.	1	2	3	4	5	6	7	8	9	10

QUESTION	ANSWER									
Architecture	Disagree					Agree				
Our management structure is perfect for our size and the nature of our business.	1	2	3	4	5	6	7	8	9	10
This business is positioned in the most profitable part of the value chain.	1	2	3	4	5	6	7	8	9	10

QUESTION	ANSWER									
Resources	Disagree					Agree				
We have really good relationships with the community.	1	2	3	4	5	6	7	8	9	10
We have enough of the right people, perfectly trained and highly motivated to run this business well.	1	2	3	4	5	6	7	8	9	10
I fully understand all of our accounting reports.	1	2	3	4	5	6	7	8	9	10
We are up-to-date in our use of technology.	1	2	3	4	5	6	7	8	9	10
We have all the cash we need to operate effectively.	1	2	3	4	5	6	7	8	9	10
We have enough financial resources available for growth.	1	2	3	4	5	6	7	8	9	10
We collect money that is owed to us as soon as we would like to.	1	2	3	4	5	6	7	8	9	10
A successor is already groomed to take over this business if the CEO leaves.	1	2	3	4	5	6	7	8	9	10
We pay all of our debts as soon as our creditors would like their money.	1	2	3	4	5	6	7	8	9	10

QUESTION	ANSWER									
Systems	Disagree					Agree				
We do a really good job of appraising employees' performance AND giving them honest feedback.	1	2	3	4	5	6	7	8	9	10
We have effective systems in place to ensure that we stay on track in carrying out our strategy.	1	2	3	4	5	6	7	8	9	10
We operated with accurate budgets and we deal effectively with any deviations.	1	2	3	4	5	6	7	8	9	10
We do a really good job of tracking and controlling costs.	1	2	3	4	5	6	7	8	9	10

QUESTION	ANSWER									
Empowerment	Disagree					Agree				
Our workers have a lot of freedom to pursue initiatives that will improve the business.	1	2	3	4	5	6	7	8	9	10
Workers here are given free rein to implement their good ideas.	1	2	3	4	5	6	7	8	9	10

QUESTION	ANSWER									
Relationships	Disagree					Agree				
I have really good relationships with all our employees.	1	2	3	4	5	6	7	8	9	10
We have really good relationships with all our customers.	1	2	3	4	5	6	7	8	9	10
We have really good relationships with all our suppliers.	1	2	3	4	5	6	7	8	9	10
Our business customers think of us as a supply-chain partner, not just a supplier.	1	2	3	4	5	6	7	8	9	10
Our own suppliers prefer to do business with us rather than with their other customers.	1	2	3	4	5	6	7	8	9	10
We have really good relationships with all our creditors.	1	2	3	4	5	6	7	8	9	10

Please indicate your acceptance to receive service. Your data will not be accepted if this step is not completed.

The information entered in this database will be used to assist your firm with marketing and procurement opportunity matching services. The purpose for collecting this information is to track the development of the minority business for use in statistical surveys and other research. In that regard, the information entered into the form will be available to the general public.

In addition, information collected on this form will be made available to federal, state and local agencies for use in statistical surveys and other research to track the development of minority businesses. By entering data in this form you certify that you are authorized to make this information available to the public and agree to all the terms and conditions as specified herein.

Privacy Notice: The information entered in this database will be used to assist your firm with marketing and procurement opportunity matching services. The purpose for collecting this information is to track the development of the minority business for use in statistical surveys and other research. In that regard, the information entered into the form will be available to the general public. In addition, information collected on this form will be made available to federal, state and local agencies for use in statistical surveys and other research to track the development of minority businesses. By entering data in this form you certify that you are authorized to make this information available to the public and agree to all the terms and conditions as specified herein.

Consent to Information Collection/Sharing: Generally, Minority Business Development Agency will not share any personally identifiable information you give us with any other government agency, private organization, or the public, except with your consent or as required by law. **Information Protection:** the Minority Business Development Agency will protect all information consistent with applicable law including, but not limited to, the Privacy Act of 1974 and Freedom of Information Act. **Your Rights under the Privacy Act:** Information concerning the Privacy Act can be found on the following website: <http://www.cftc.gov/foia/foiprivacyact.htm>

"I certify that I represent a Minority Business Enterprise. MBDA defines a Minority Business Enterprise as a business which is owned or controlled by socially or economically disadvantaged persons who are members of one of the following eligible groups: African Americans, Aleuts, Asian Indians, Asian Pacific Americans, Eskimos, Hasidic Jews, Native Americans, Puerto Ricans, and other Spanish-Speaking Americans. I understand that false certification may result in a fine or imprisonment under applicable Federal law."

Please print a copy of this form for the client to sign, and place a copy of the signed print out in the client record. When this is complete, please write "Yes" in the box below to indicate agreement to all of the above terms and conditions.

Signature: _____ Date: _____ Enter "Yes" here: