

Project GATE II Customer Information Sheet

Growing America through Entrepreneurship

Please read the instructions at bottom before completing form.

Name: _____	Workforce One ID: _____
Address: _____	WebCATS ID: _____
City: _____ State: _____	Primary phone: _____
Zip Code: _____	E-mail address: _____

Dislocated Worker Counselor Information

Name: _____

Phone: _____

Fax: _____

E-mail: _____

Notes: _____

Business Development Consultant Information

Name: _____

Phone: _____

Fax: _____

E-mail: _____

Notes: _____

Project GATE II Activity Progress Tracking

1. Pre Assessment Date completed: _____ By whom: _____
Notes: _____

2. Orientation Date completed: _____ By whom: _____
Notes: _____

3. Business Readiness Assessment Date completed: _____ By whom: _____
Notes: _____

4. Business Consulting Date completed: _____ By whom: _____
Notes: _____
(Please continue on back if needed.)

5. Classroom Training Date completed: _____ By whom: _____
Notes: _____
(Please continue on back if needed.)

Instructions for form usage:

- DW Counselor**, give this form to the customer and have him/her complete the top portion at your first meeting.
- DW Counselor**, complete the Workforce One ID in the top section (found on the demographic page in WF1) and the DW counselor information. Please fill it out completely. Fax and email are essential. Give the form back to the customer and instruct her/him to bring the form to her/his first meeting with the SBDC consultant.
- Customer**, provide this form to your SBDC consultant at your first meeting.
- SBDC Consultant**, complete the WebCATS ID in the top section and fill out business development consultant information. When all three top sections are complete, photocopy the form. Keep a copy for your records, fax the DW counselor a copy, and give the final copy to the customer.
- Customer**, use the bottom of the form to keep track of your services. Share these dates and names with your DW counselor.

Thank you for ensuring that we maintain good communication between all parties!