

Delta State University Women Minority Business Development Center

Quickbooks Client Pre-Assessment

Name:	City:
Date:	Mobile Number:
Company Name:	Office Number:
Street:	Email:
State:	Website:
Zip Code:	Business Social Media:

Please Complete Discussion Topics Prior To Meeting	Response
1. Are you a WMBDC client? < YES / NO >	
2. Do you work in your business fulltime or part-time? < YES / NO >	
3. Are you currently registered with the MS Secretary of State? < YES / NO >	
4. Have you completed and delivered your two (2) page business plan to Bus Developers? < YES / NO >	
5. Are you registered with the Procurement Services agency located within our WMBDC office? < YES / NO >	
6. How many WMBDC Financial Capital Conferences in 2022 have you attended, [a] 2021, [b] 2022, or both? < CHOOSE BEST OPTION >	
7. How many workshops (in-person/virtual) have you attended, since being a WMBDC client? < YES / NO > <i>THE WMBDC OFFICE MAY HAVE TO ANSWER.</i>	
8. Have you attended any scheduled Financial Prep and Mock Interviews? < YES / NO >	
9. Did you participate in the MCFAC Financial Literacy program in February 2022 hosted by WMBDC? < YES / NO >	
10. Do you have a separate checking business account for your business? < YES / NO >	
11. Have you ever used QuickBooks Financial Software before? < YES / NO >	

12. Do you currently own a laptop or desktop computer? < YES / NO >	
13. Are you available to attend a Quickbooks training program: [a] in person [b] zoom only and [c] both? < CHOOSE BEST OPTION >	
14. How do you currently keep track of your business financial records? < BRIEF STATEMENT > 15. Please share some of your business goals that you expect Quickbooks to assist you in obtaining. < BRIEF STATEMENT >	

Please return the QuickBooks Client Pre-Assessment form back by no later than March 17, 2023.