

## Request for Consulting Application

Business Name:	Requestor (First Name, Last Name):		
Street Address:	City:	Zip:	Fax #:
E-mail: (print)	Company Website:		Cell #:

**Describe your products and/or services:** See attached email

**Priority # (1=most important)**

**HOW MAY WE HELP YOU?**

**Human Resources/Leadership:** Analysis and recommendations on how the organization can better leverage its people. The focus will be on improving organizational effectiveness through leadership development and/or the strategic use of human resources. Leadership development emphasizes skills that current or future leaders in the organization can use to improve their effectiveness, such as networking, persuasion, time management, team building, and emotional intelligence. Human resources emphasizes building an environment that better allows employees to helping the organization implement its strategy by focusing on creating and/or revising programs related to employee selection (job design, recruitment, interview process, training, socialization) and employee retention (culture, motivation, incentives).

**Operations Management:** General management issues and challenges. Focus on such areas as overall planning, organization and control with an emphasis on designing/developing systems that will better serve/ enhance the customer relationship

**Accounting/Finance:** Accounting, financial issues and challenges. Recommendations focus on such areas as budgeting, purchasing, collections, payroll, taxes, designing safeguards from error and embezzlement, financial reports, cash management and banking relationships.

**Strategy:** *The consulting project is tailored to the strategic needs of the client. The team will identify a set of specific problems and perform analyses on the organization, the markets, the industry and the competitors to deliver actionable and substantiated recommendations. The project could focus on issues such as the pursuit of new business opportunities, the response to specific threats, the strategic justification for investments or divestitures, or the reinforcement of the competitive position of the company.*

**Marketing:** Increasing sales, new product/service ideas, advertising and promotion, market research, social media, website usability, email marketing, pricing, public relations, and customer service.

**Additional information:** Please check one for each question:

- |   |                     |                              |                             |
|---|---------------------|------------------------------|-----------------------------|
| Are you open to a comprehensive review of your company?             | √ <b>Check one:</b> | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Does your company have up-to-date, monthly financial statements?    | √ <b>Check one:</b> | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Will you permit a review and analysis of your financial statements? | √ <b>Check one:</b> | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Is your business home based?  | √ <b>Check one:</b> | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Is your business family owned?                                      | √ <b>Check one:</b> | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

How long has your venture/organization been operating?    years

How many full time employees does it have? #

What were your revenues/budgets last year? \$

Projected revenues/budgets this year? \$ \_\_\_\_\_

I request student consulting from California State University, Fullerton's Small Business Institute ("School"). Students work in teams of three to six and select field case through an application process. They provide consulting services over a twelve-week period. To cover expenses, I agree to pay a sliding scale fee based on my business size – last year's revenues and area of expertise as follows:

Last year's revenues	Strategy	Marketing	Accounting, Finance, Leadership/Human Resources, Operations Management
(a) \$999K or less	\$2,995	\$1995	\$ 995
(b) \$1M - \$2.9M	\$3,995	\$2995	\$1,995
(c) \$3M - \$4.9M	\$4,995	\$3995	\$2,995
(d) \$5M or more	\$5,995	\$4995	\$3,995

I agree to cooperate in surveys designed to evaluate the students' consulting work. I authorize the School to furnish relevant information to students, teachers, volunteer guides, and judges of awards/prizes. I expect all parties will hold the information in strict confidence. I understand and agree that School may use the results of the students' consulting for educational purposes and enter it in awards programs/contests. I agree that School may use my name, my venture's name and photographs to publicize student consulting, the School, awards programs/contests, and prizewinners.

I further understand that all parties have agreed not to: (1) solicit or accept compensation for any services to my venture while operating under this agreement; (2) recommend the purchase of goods or services from sources in which they have an interest or represent; (3) request or accept fees or commissions from third parties who have supplied goods or services from sources in which they have an interest or represent; (4) request or accept fees or commissions from third parties who have supplied goods or services to my venture upon their recommendation; or (5) use what they learn from my venture to enter an enterprise that directly competes with my venture. In consideration for the School's furnishing consulting services, I waive all claims against School personnel, teachers, students, volunteers, and sponsors arising from these consulting services.

**Quick Fax Reply**  
**Toll Free (888) 278-8489**  
 Or mail to:

Small Business Institute-SGMH-5323  
 California State University, Fullerton  
 Fullerton, CA 92831

\_\_\_\_\_  
 Signature & Title of Requestor

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 Date