Congratulations on committing to the long-term success of your business!

The Small Business Training Grant will provide financial support to help you launch or grow your business.
The goal of this grant program is to help businesses in San Francisco achieve economic growth and longevity.

Your answers should be at least 100 words unless the question asks for a list. You will be DISQUALIFIED if your answers are too short, lack detail, or if you leave questions blank.

## Client/Business Information

Business name:
Business owner name:
Business phone:
Business email:
Business Address:

## 1. About the Business

a. Please provide a brief summary of your business. What made you decide to start this business? (minimum 100 words)
b. What is your experience in this industry. Describe any formal training, mentorship, or education you received. (minimum 100 words)

Describe your customer base. How do you plan to grow
c. your customer base? (minimum 100 words)
d. Describe your products and/or services. (minimum 100 words)

## 2. Growth Plan

a. If you receive the funding, what are the key dates and milestones for your business in the next year? Please build out your timeline. (minimum 100 words)
b. Where do you see your business in the next three years? (minimum 100 words)
c. What type of licenses or permits are required for your business? Explain where you are in the process of getting them. ( 50 words minimum)

## 3. Existing or Anticipated Challenges

a. What challenges do you see that you will have to overcome for your business to succeed?

Please list at least three. How do you plan on overcoming these?
i. Challenge: (minimum 100 words)
ii. Challenge: (minimum 100 words)
iii. Challenge: (minimum 100 words)

## 4. Competition

Who are your biggest competitors and why? How is your product or service different from what your competitors offer? (minimum 100 words)

## 5. Operations

Who is/are the owner(s) and employees? Please describe their responsibilities and a. job duties. (minimum 100 words)
b. What hours/days of the week will your business be open?

## 6. Marketing Strategy

a. Describe your advertising and marketing ideas. Include examples of marketing strategies you plan to use such as mailing lists, print advertisements, social media, events, etc. (minimum 100 words)

## 7. How do you plan to use your grant award?

Please fill out the table below detailing how you plan to use your grant award. Use dollar amounts (ex: $\$ 1,200$ ).

| Business Expense | How much of <br> your <br> anticipated <br> grant award <br> will you spend <br> on this <br> business <br> expense? | Please describe your anticipated <br> expense in more detail (a list or <br> sentence is fine) |
| :--- | :--- | :--- |
| Accounting |  |  |
| Employee Wages |  |  |
| Equipment/supplies |  |  |
| Insurance |  |  |
| Licenses/Permits |  |  |
| Rent for storefront |  |  |
| Tenant improvements <br> (ex: repairs, construction, <br> move-in costs) |  |  |
| Utilities |  |  |
| Merchandise/Inventory |  |  |


| Other: |  |  |
| :--- | :--- | :--- |
| Other: |  |  |
| Total |  |  |

## 8. Financial Projections

What are your financial projections for 2023? Please fill out the table below using dollar amounts (example: $\$ 1,200$ ).
Things to think about when filling out the table:

- Your goals for the year
- Seasonal factors (retail sales often increase during the holidays)
- Funding (If you receive a loan or grant, how will that affect your projections?)
- Fixed costs (rent, wages, insurance) versus variable costs (marketing, supplies, bills)

| 2023 | Month <br> 1 | $\begin{array}{\|l} \hline \text { Month } \\ 2 \\ \hline \end{array}$ | Month <br> 3 | Month <br> 4 | Month <br> 5 | Month 6 | Month <br> 7 | Month <br> 8 | Month 9 | $\begin{aligned} & \text { Month } \\ & 10 \end{aligned}$ | $\begin{aligned} & \text { Month } \\ & 11 \end{aligned}$ | $\begin{aligned} & \text { Month } \\ & 12 \end{aligned}$ | Total |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| SALES |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Gross Sales |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Cost of Goods |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Gross Profit <br> (Gross Sales - Cost of Goods) |  |  |  |  |  |  |  |  |  |  |  |  |  |
| EXPENSES |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Accounting |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Employee salaries/wages |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Equipment \& supplies |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Insurance |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Licenses/permits |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Marketing/advertising |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Merchandise/inventory |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Owner's draw (how much the owner(s) earns each month) |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Rent for storefront |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Tenant improvements (ex: repairs, construction, move-in costs) |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Utilities |  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |



