

If someone is a NEW client, meaning they have not received consulting services from ANY SBDC in the state of Illinois to date, they follow these steps.

If someone is an existing client, meaning they have had at least one consultation with our center or another in the state, they simply email us directly. At this time Assistant Director, Angela Kuppersmith is handling all appointment requests:
akuppers@iwu.edu

Steps to request first appointment:

Visit our website: www.mcleancosbdc.org and click “request appointment” button.



On the “Request appointment” page, scroll down and click the “New Client Signup” link.

A screenshot of the "Request appointment" page. The page contains text about the services offered by the SBDC and a paragraph about their role. Below this is a section with the heading "Please complete the "new client signup" process at the link below to request an appointment, and an advisor will follow up with you soon." In red text, the link "New Client Signup" is underlined and highlighted with a blue arrow pointing to it. Below this, the text "You can view the step-by-step process [here](#)." is shown. At the bottom, there is a note: "If you have difficulty accessing the new page, copy this link into your browser, please note Chrome is best: <https://ilsbdc.ecenterdirect.com/ClientSignupFull.action?CenterID=126>".

The, you will be taken to a new page. Use the first name, last name, and email address you'd like to use to set up your client file.

The screenshot shows the 'Get Started' step of the account setup process. At the top, there's a navigation bar with links for Home, New Client Signup, Contact Us, Training Events, and Useful Links. Below the navigation is a progress bar with four steps: 'Get Started' (step 1, highlighted in green), 'Select Center' (step 2), 'User Details' (step 3), and 'Company Details' (step 4). A large blue arrow points from the 'Get Started' step to the 'New Account' form below. The 'New Account' form contains fields for First name, Last name, Email, and Password, with a 'Submit' button at the bottom.

Next, provide your contact information, address, and demographic details. And then click “continue.”

Note: For our center to serve you, you must be located in McLean County. If located elsewhere, select a different center.

The screenshot shows the 'User Details' step of the account setup process. On the left, there's a 'Contact Information' section with fields for First Name (Jane), Last Name (Doe), Email (test123@gmail.com), and checkboxes for future mailings and phone numbers. There are also fields for Alt. Phone Number and Fax Number. On the right, there's a 'Details' section with dropdown menus for Gender, Race, Hispanic Origin, Veteran Status, Military Reserve Status, and Disabled status. A 'Continue' button is at the bottom of this section. A blue arrow points from the 'User Details' step in the progress bar to the 'Details' section.

Next, provide your company's information and click "continue" at bottom.

Note: The fields will vary depending on if your first selection for "company status" is "in business" vs "not in business."

The screenshot shows a progress bar at the top with four steps: Get Started, Select Center, User Details, and Company Details. Step 4 is highlighted with a green circle and the number '4'. Below the progress bar, a message says 'We need some more information before we can complete your account setup.' The 'Company Information' section contains fields for Company Status (dropdown menu showing 'Not in Business') and Company Name (text input field). The 'Company Address' section contains fields for Company Address (text input field), Company City (text input field), State (dropdown menu showing 'Illinois'), ZIP Code (text input field), and Country (dropdown menu showing 'United States'). A checkbox labeled 'Mailing address is the same as physical address?' is checked.

Then, review the agreement page regarding the confidential collection of your information as a client of our center through the Small Business Administration (SBA). Fill out your full name at the bottom to sign and accept the terms outlined on the page and click "Continue."

The screenshot shows a progress bar at the top with three steps: Get Started, Select Center, and User Details. Step 3 is highlighted with a green circle and the number '3'. The main content area is titled 'REQUEST FOR COUNSELING PAGE 2 of 2'. It contains text about the Paperwork Reduction Act (44 U.S.C. § 3501) and SBA's information collection for entrepreneurial development programs. It also includes a note about the estimated burden for completing the form and contact information for the Office of Information Regulatory Affairs.

Last, indicate the type of assistance you are seeking via the checkboxes. Also use the freeform box to describe the specific services you are requesting or questions you have. Then click “continue” one last time.

This triggers a notification to Assistant Director of the center who has to accept your client request. You can expect a response via email within 1-3 business days that will ask you our initial questions and discuss next steps for setting up a consultation based on available resources.

Get Started Select Center

1 2

Please select the type of assistance that you are seeking:

- Business Accounting/Budget
- Business Plan
- Buy/Sell Business
- Cash Flow Management
- COVID-19 Financial/Capital
- COVID-19 General Support
- Customer Relations
- Disaster Planning
- Disaster Recovery
- eCommerce
- Engineering R&D
- Exporting
- Financing/Capital
- Franchising
- Government Contracting
- Human Resources/Managing Employees
- Legal Issues
- Managing a Business
- Marketing/Sales
- Risk Management
- Social Media
- Start-up Assistance
- Tax Planning
- Technology/Computers
- Training
- Use of Growth Wheel with client

Please describe specific service or assistance requested:

Continue