



Client Intake Form

We want to get to know you before we meet. Please fill in as much information as possible.
THANK YOU.

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|--|-----------------------------------|
| Company Name | |
| Contact Name | |
| Email Address | |
| Telephone Number | |
| Company Website | |
| Company Email | |
| Address, City, State & Zip Code | |
| Years in Business | |
| What certifications do you accept from your diverse suppliers | |
| Do you have a supplier diversity website? | (If Yes – Please provide the URL) |
| How do current diverse suppliers reach you? | |
| What is your current spend \$\$ with diverse suppliers out of total spend last year? | |
| Does your company have a supplier diversity goal? | |
| Regional, national, or international areas your company supplies/services: | |
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| A brief overview of your company background, goods/services offered, company size, annual gross revenue: | |
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| How can M&A Supplier Diversity Consultants assist you with your diversity objectives? | |
| <input type="checkbox"/> | Help us with a Vendor Assessment to identify how many of our suppliers are certified. |
| <input type="checkbox"/> | Offer guidance to promote and market our Supplier Diversity Program and be involved in the community we serve. |
| <input type="checkbox"/> | Sourcing more diverse suppliers. |
| <input type="checkbox"/> | Identify an Overall Supplier Diversity Program in the following three major areas for us to focus on: a) b) c) |
| <input type="checkbox"/> | Educating my suppliers with the company's Supplier Diversity Program: Prime Contractors – setting up Tier 2 opportunities. |
| <input type="checkbox"/> | Assistance with building supplier diversity into a contract. |
| <input type="checkbox"/> | Educating my current self-certified suppliers to be officially certified by the state, city or a third-party certifying agency. |
| <input type="checkbox"/> | Educating my procurement team by developing programs that are inclusive of diverse suppliers. This will offer an understanding and familiarization for a maintaining a diverse supplier organization. |
| <input type="checkbox"/> | Offer us insight for our technology needs by developing a supplier diversity vendor database that measures and validates our supplier diversity commitment. |
| <input type="checkbox"/> | Review the company's policy and procedure protocol to advance and further its current Supplier Diversity Program. |
| <input type="checkbox"/> | How do I create a Supplier Diversity Plan for my prime contractors. |
| <input type="checkbox"/> | How do I keep up with my current suppliers' certifications to ensure they remain in good standing? |
| <input type="checkbox"/> | Goal setting for Supplier Diversity personnel and for the team. |
| <input type="checkbox"/> | My company would like to launch a Supplier Diversity Program and understand more of what M&A can offer. |
| <input type="checkbox"/> | How do I define my company's Supplier Diversity Program? |
| <input type="checkbox"/> | Other: Please identify other areas that M&A might assist you with not listed above: |



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