Onboarding a new PROBE applicant

**Getting started and setting up the first meeting**:

Once the BCT is submitted, Olympus saves it in our shared PROBE folder, creates a Project in SalesForce and saves a copy of the BCT in SF.

Olympus will assign the applicant to an EIR and cc the EIR on the email that goes to the applicant. A copy of the BCT will be attached.

Olympus will include a link to the EIR’s Calendly if using one. Otherwise, the EIR must follow up by email to ensure the first meeting gets scheduled.

Orientation: The idea may be a terrible one but avoid making judgements at this stage. Your purpose/goal is to teach them the methodology and tools for evaluating the commercial viability so they can kill or modify their own idea – and know why. This is experiential learning, not a lecture on why its not a good idea: -) We also try to be consistent with NSF ICorps methodology and terminology.

**First meeting**:

- Use the PROBE Tracking and Status Worksheet and capture needed information

- Check the team listing to make sure they have included their school and expected graduation date.

- Review the idea as much as needed to get clarity on what they believe is the value proposition etc. Take notes in SalesForce.

- 99.9% of the time, their first ‘homework’ is customer discovery (Tab 11 in the Resource Book or in the Entrepreneur Resources Section). I generally go through this page by page, giving examples using their business idea. This is a good way to suggest other verticals to pursue or ideas that they might pivot to.

 -The Customer Interview Guide is a resource to help keep them focused on the hypothesis they need to prove (or disprove).

- Encourage them to sign up for the Weekly Bulletin.

**At the end:**

**-** Explain how Olympus works . Up to the team to maintain relationship/request meetings with the EIR but I generally set up the next meeting usually 2 weeks out. This helps them maintain momentum.

- Review the Startup Agreement. They can just type in their name if done remotely. If in person, when they sign, make a copy of the document. They can bring it back later if they want to read it over or discuss with a cofounder. (Most sign)

- Review the Benefits of Working with Olympus (e.g. Orient them to the other resources available to them).

**After the Meeting**:

Complete recording the relevant information in SalesForce

During COVID:

- Olympus will be keeping the ‘books’ and ultimately will update the Board when allowed to return.

1/12/22

[Resources for EIRs](https://www.cmu.edu/swartz-center-for-entrepreneurship/education-and-resources/project-olympus/olympus-eirs/resources-for-eirs1.html) (Found in the Project Olympus Entrepreneurs-in-Residence section of website).