

APPLICATION CHECKLIST

A friendly, step-by-step guide to your IMAG application: everything you need in one place.



Work through every box below **before** you open the portal.

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Most applications get sent back for the **same fixable reasons**: a name that doesn't quite match, a missing signature, a blank field. This checklist mirrors the application itself, section by section, so nothing gets missed.

1 BUSINESS INFORMATION

- ☐ Legal Entity Type selected
- ☐ W-9 uploaded, **real signature** (typed name doesn't count), dated, less than 12 months old
- ☐ Tax ID & entity type on W-9 match the rest of your application
- ☐ DFI registration confirmed with the **State of Wisconsin**, active **1+ year** (registration in another state doesn't count; verify on the [WI DFI site](#))
- ☐ Chartering document attached (e.g. Articles of Incorporation)
- ☐ Legal business name matches your W-9 and DFI registration **exactly** (trade name optional)
- ☐ Mailing address complete, incl. county (must be a **Wisconsin county**)
- ☐ Date Established entered
- ☐ NAICS code matches your business; check it against [WEDC's NAICS tool](#)
- ☐ State of Organization & Foreign Ownership answered (doesn't have to be WI)
- ☐ Fiscal Year End Date entered (must be the **last day of a month**)
- ☐ Phone, Industry, and Demographics fields completed (demographics are for outreach data only, not scored)

Registered with WI DFI less than a year? You're not yet eligible. Call your Grants Manager before you start.

2 PEOPLE & OWNERSHIP

- ☐ One **Principal Director** named: the person authorized to sign for the company
- ☐ All 5 project roles assigned: Project Contact, Legal Contact, Financial Contact, Reporting Designee, Contract Signor (*one person can hold more than one*)
- ☐ Every individual owner of 20%+ listed with **full legal name**, no middle initials
- ☐ If a company (not a person) owns 20%+, its full ownership breakdown is attached
- ☐ Own less than 20%? A signed written attestation can stand in for full owner details
- ☐ Parent or sibling companies noted, if any

3 YOUR HISTORY WITH IMAG

- ☐ Received a prior IMAG? Briefly summarize what it achieved, and explain any lapsed or unused funds
- ☐ This project is new/different from past IMAG-funded work. Similar to a past project? Spell out what's different (e.g. upgrading from a starter booth to a premium one at the same show)
- ☐ You're under your lifetime cap: **3 awards** (standard) or **6** (ExporTech grad)

GOOD TO KNOW

Submit at least **6 weeks** before you want to start spending. Underwriting and background checks take time. Applications submitted with less lead time may be delayed.

WRITE YOUR NARRATIVES

Every section below is required. Mind the paragraph counts: too short is the #1 reason for a return.

This is where most applications need the most work.

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4 PROJECT NARRATIVES

- ☐ **Company Information:** who you are, what you make or sell (1–2 paragraphs)
- ☐ **Project Location:** must be in Wisconsin
- ☐ **Countries Targeted:** 4–6 countries, one shared strategy, never the U.S. or its territories
- ☐ Every country you'll travel to **MUST** be listed here and match your Activities Supported answer
- ☐ **Rationale for Target Countries:** why these markets (1–2 paragraphs)
- ☐ **Maintain & Grow International Business** (1–2 paragraphs)
- ☐ **Growth in Wisconsin:** how this project helps your WI operations (1–2 paragraphs)
- ☐ **3 goals** listed: specific and achievable, not a general description of your business
- ☐ Full-time staff count entered
- ☐ **Service Vendors:** specific to this project; can't be your own employees or WEDC. Think through exactly who you plan to hire and pay for these activities
- ☐ Modifying your product? Explain the change, how it helps sales in the target market, and back it up with cost research (3–5 paragraphs; packaging redesign alone doesn't count)

Activities Supported: the #1 reason applications bounce back. Say exactly what you'll spend on, where the money goes, and how each activity grows your export sales. Aim for 2–4 real paragraphs, one per activity. A one-line answer will come back to you. Every country in Countries Targeted needs its own detail here, and every budget line item must be called out one by one, or the application will be returned. Activities Supported, your budget, and Countries Targeted all have to line up with each other. Want a walkthrough? Short how-to videos are posted on our website.

♀ WRITING TIP

Reviewers can only evaluate what's on the page. A short, vague answer reads as an incomplete application, even if the real plan is strong. Be specific everywhere.

WHAT "SPECIFIC" LOOKS LIKE: ACTIVITIES SUPPORTED

⊘ Too vague (comes back to you):

"We will attend a trade show in Germany and do some marketing to grow sales."

Specific (approvable):

"We will exhibit at [Trade Show], Munich, in a 10x10 booth (\$4,200) to meet distributors in our target sector. Booth materials will be translated into German (\$800). We expect this to generate 15–20 qualified leads and \$50,000 in first-year sales based on past show performance."

NUMBERS & FINAL CHECKS

Projections, budget, and the last look before you submit.

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5 PROJECTIONS & FINANCIALS

- ☐ New to exporting or experienced (answered)
- ☐ Gross export sales given as **one combined number** for your target markets (not one per country)
- ☐ Gross export sales for **all** international markets given as one number, and it's ≥ your target-market number
- ☐ Full-time employees entered: total and Wisconsin-based, whole numbers (people, not hours)
- ☐ Financials: equity = assets minus liabilities, and it checks out
- ☐ At least **1 year** of sales history on file
- ☐ Gross revenue under **\$50 million** (ag exporters are exempt from this cap)
- ☐ Any decline explained in the notes, whether it's sales, revenue, or another area, even a single down year

6 YOUR BUDGET

- ☐ WEDC's **official Excel template**, unmodified
- ☐ Correct tab used: **ExporTech** vs. **non-ExporTech**
- ☐ Every line matches an activity from your narrative
- ☐ Your **30% match** is included and adds up

APPLICANT TYPE	PER AWARD	LIFETIME
Standard applicant	up to \$10,000	3 awards
ExporTech™ graduate	up to \$30,000	6 awards

One award per company, per fiscal year. This is a **reimbursement** grant: you pay first, then request funds back by submitting itemized invoices specific to this project.

7 BEFORE YOU HIT SUBMIT

- ☐ **Legal proceedings question answered.** If checked "yes," add a written explanation.
Same for State Requests for Bid or Proposal.
- ☐ **All 3 certification statement boxes checked.**
Leaving one blank makes the application ineligible.
- ☐ **Attestation box checked:** legal name matches DFI exactly.
Required for every applicant, no exceptions.
- ☐ **Everything submitted through the Network Wisconsin portal.**
This is a legal document. WEDC cannot accept documents or applications by email.

ROUND 1

Jul 1 - Oct 31

ROUND 2 (ONLY IF FUNDS REMAIN)

Feb 1 - Mar 15

Questions? We're happy to help.

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LOOK FORWARD »