



Business Development Advisor Certification Program

Version 2

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2015

Illinois SBDC Network

IESBGA provides professional development and training on behalf of the Illinois Small Business Development Center Network Members (Members.)

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Note: All documents are available online – **Introduction to Business Development Advisor Certification**

Business Development Advisor Certification Program

The purpose of the Illinois Entrepreneur and Small Business Growth Association's (IESBGA) Professional Business Development Advisor Certification Program is twofold:

1. To provide standardization of excellence in entrepreneur counseling throughout the Illinois SBDC Network (Network.)
2. To provide the basic knowledge and tools needed by each counselor within the Network.

On behalf of the Network, IESBGA provides professional development and training for the Illinois Small Business Development Center Network Members (Members.)

Illinois SBDC Network Members

The Illinois SBDC Network was established throughout the state of Illinois to provide small businesses seeking advice with the following services:

- Business management
- Counseling and training
- Assistance in entering international markets
- Information on competing for state and federal contracts
- Developing technology-related products
- Providing a supportive environment

The Centers in the Network, located throughout Illinois, include Illinois Small Business Development Centers (SBDC), Procurement Technical Assistance Centers (PTAC), International Trade Centers (ITC) including NAFTA Opportunity Centers (NOC), Technology, Innovation and Entrepreneurship Services (TIES,) Women's Business Centers, the Office of Minority Business Development, Small Business Incubators (SBI), and Small Business Innovation Research Centers (SBIR.) These organizations comprise the Illinois SBDC Network.

Assistance is provided in the areas of preparing business and marketing plans, securing capital, improving business skills, accessing international trade opportunities, and addressing other business management needs. The Network is a collaborative arrangement among the Illinois Department of Commerce and Economic Opportunity (DCEO), the U.S. Small Business Administration (SBA), the U.S. Department of Defense (DOD), colleges and universities, and private organizations.

Business Development Advisor Certification Program Overview

IESBGA Small Business Development Advisor Certification is now available online providing new advisors with the option to take the eTraining anytime, anywhere with an assigned peer coach to encourage them in completion of the certification process.

IESBGA Small Business Development Advisor Certification consists of ten separate modules that were designed to provide Small Business Development Advisors with essential skills that ensure consistent advice to entrepreneurs seeking assistance.

IESBGA Business Development Certification Program is a blended learning opportunity to complete Online Modules and activities plus work with a peer coach one-on-one, in small groups, or webinars.

A new Business Development Advisor is assigned a peer coach so they can ask questions about the experience and receive support as they work through the modules in certification process.

There are ten Modules covering a wide range of topics including ethics, counseling techniques, cross-selling Network services, government regulations, marketing, financing, budgeting, financial statements, and other operational tasks that are key to small business growth.

Before starting the program, it is advisable to become familiar with both the Business Development Advisor Certification eGuide with all of the course materials and documents and the IESBGA Business Development Advisor Certification Program eGuide (this document) with the details on the program design and operations.

BusinessAdvisorCertificationeGuide.pdf and **IESBGABusinessAdvisorCertificationProgrameGuide.pdf** are available Online in the Introduction to Business Development Advisor Certification Module.

Required and Optional Modules

Modules 1 – 4 are required for certification as a Certified Business Development Advisor. Although Modules 5 – 10 are not required, they are completed to earn credits toward certification and re-certification. Modules 1 – 4 can be repeated every five years to refresh and reinforce the concepts presented on ethics and counseling. In addition, based on the every changing political landscape, Modules 3 (Cross-selling Network Services) and Module 4 (Government Regulations) will change in content every five years.

The four required modules and guidelines regarding timeframes for completion are:

1. Code of Professional Performance (Prior to assisting any Network client)
2. Counseling Techniques (Within 60 days of employment or volunteer appointment)
3. Cross-Selling Network Services (Within six months of hire)
4. Government Regulations (Within six months of hire)

The six additional modules are:

5. Marketing
6. Record Keeping and Budgets
7. Financial Statements
8. Sources of Financing
9. Business Planning
10. Starting a New Business

The Peer Coach first evaluates the background of each new Business Development Advisor to determine the training needs of the individual. The Peer Coach then works closely with the Business Development Advisor and the Business Development Advisor's Supervisor, assigning training activities, guiding the training process, and completing the various evaluations that will ultimately lead to the certification of the Business Development Advisor, with the designation of "Certified Business Development Advisor."

Registration (Certification / Online Training)

Registration in the certification program occurs at the time of notification that a new Business Development Advisor has joined the network. When a Neoserra ID is assigned, the Program Administrator is notified and receives first name, last name, email address, and Illinois SBDC Network Center.

1. When a large group of Business Development Advisors (members of the network) enroll Online, a file can be created and uploaded to a catalog. The Excel file with username, first name, last name, email address, and center is generated.
2. Current Business Development Advisors and center staff will be assigned an ID that will be paired as needed with new Business Development Advisors when they are assigned as Peer Coaches.
3. The new Business Development Advisors are entered as the notification is received from Neoserra using the same ID. It is estimated that the normal frequency is approximately 4 to 6 / week.
4. Note: e-Mail is generated by Neoserra and sent to the new user with their password and instructions about logging into the systems.
5. An E-Mail is also sent to the Business Development Advisor with their User Name and Password.
6. Program Administrator utilizes a decision tree to select a Peer Coach and assign the new Business Development Advisor to the Peer Coach.
7. The Program Administrator sends an E-mail to the Business Development Advisor, Director, and Peer Coach welcoming the new Business Development Advisor, setting expectations, and providing instructions on how to access the certification program.
8. Program Administrator links Peer Coach to new Business Development Advisor using a mentor function.
9. Periodically, reports will indicate the activity in the Certification program and show Peer Coach / Business Development Advisor access to the system.

Program Administration

A Certification Committee is responsible for the design, development, and maintenance of the integrity of the program. The Committee oversees program policies, awards certification, and monitors and preserves the integrity of all aspects of the program.

The Committee consists of 6 to 10 members, from Network's participating organizations, and may include representatives from the private sector. This diversity of membership fosters impartial decisions and ensures consistency of application throughout the Network and the state. In addition, the private sector members offer valuable practical insight and objectivity.

Ideally, the Committee meets twice a year in-person at the IESBGA Conference in May and the Strategic Planning Meeting in December. In addition, the Committee can meet regularly during the year through video conferencing. The Committee conducts a face-to-face meeting at least once a year.

Certification Committee Member responsibilities include, but are not limited to,

- Review and approval of applications for certification
- Certification of Business Development Advisor
- Requests for changes in the modules and certification process
- Approval of the changes to process
- Recruitment of Peer Coaches
- Training and supporting Peer Coaches
- Attending meetings and assisting in facilitation of forums

Program Administrator

The Program Administrator implements the policies of the program as directed by the Certification Committee. As administrator of the program, their responsibilities are to:

- Coordinate Certification Committee meetings
- Act as recording secretary to the Committee
- Maintain a database of the certification status of Small Business Development Advisors
- Continuously evaluate and recommend improvement to the program
- Coordinate details of the training activities at the quarterly meetings and other continuing education efforts
- Act as a contact point for Committee Members, Peer Coaches, Developers, Advisors and their Supervisors in answering common questions about the program
- Maintain list of who has requested access to the certification modules
- Create IDs and provide access to online certification modules
- Update links on training materials
- Notify developers with issues to certification modules
- Verify completion of modules when Certification / Re-certifications are submitted
- Act as a liaison to infrastructure vendors

Peer Coach

Peer Coaches are experienced Certified Business Development Advisors who assume the responsibility of guiding new Advisors through the training and certification process. The Peer Coaches evaluate the training activities of the Advisors and document the completion of these activities.

Working with new Business Development Advisors provides the Peer Coaches with the opportunity to stay current on new resources that will benefit their clients. A Peer Coach is able to tap into the research done by new Business Development Advisors as they discover new resources and post them to the Business Development Advisor's eForum. The Peer Coach is expanding their circle of friends and increasing their network of resources to call on when in need. Increasing the collaboration within each center and between centers is beneficial to all advisors in the Network. Credit for re-certification is earned by fulfilling the responsibilities of a Peer Coach.

Business Development Advisors with expertise in a particular functional area (such as finance or procurement) may be asked by a Peer Coach to co-counsel a new Business Development Advisor. In this manner, the Advisor will have the opportunity to observe and learn first-hand from specialists in various areas. The Peer Coach has the responsibility of documenting any training activity that takes place under his or her guidance and reporting the satisfactory completion to the Program Administrator.

A Peer Coach:

- Provides a safe environment with support and encouragement
- Participates in in-person meetings and webinars
- Approves Business Development Advisors assignments
- Answers Business Development Advisors questions and addresses their concerns
- May observe Business Development Advisor's counseling sessions
- Participates in the Biannual Business Development Advisor Certification Forums

Personal Characteristics of Good Peer Coaches:

- Tolerance for "up close and personal" relationships
- Confidence in own ability and knowledge
- Consistency in good work habits and attitudes
- Self-esteem and pride in professional accomplishments
- Willingness to share information and techniques
- Willingness to learn from Business Development Advisor
- Flexibility--desire to try more than one approach
- Focus--ability to keep the Business Development Advisor on track in regard to the learning goals
- Patience!!!

Supervisors / Center Director

The supervisor is the Business Development Advisor's manager and may be a Peer Coach. The Business Development Advisor's supervisor also has specific responsibilities for enrolling the potential Business Development Advisors in the modules, ensuring the Business Development Advisor adheres to recommended timelines, and supports the peer coach and advisor when information and resources are requested.

Business Development Advisor (Certification or Re-certification)

The Advisor seeking certification or re-certification has specific responsibilities for:

- Requesting access to the modules from the Program Administrator
- Submitting the Certification / Re-certification form
- Completing modules and assignments
- Research and add content to the eForum
Note: This is the primary method of determining an understanding of the material covered in the certification program
- Attending in-person meetings / webinars
- Observing the recommended timelines (Completing Modules 1 – 4 within six months of hire)

Developers

With a blended certification program, which incorporates online components, a new role of developer is included to make changes to the online modules and maintain the validity of the Internet links. The developer is responsible for:

- Making changes to modules as requested by Committee and Administrator
- Making recommendations for changes to Committee
- Maintaining Process Documentation
- Supporting the Program Administrator and Committee Members
- Facilitating Webinar/Roundtables if requested by the Program Administrator
- Incorporating new material in the modules as appropriate, i.e. YouTube links

Note that the developers are not responsible for ongoing maintenance of the training, for social media, or monitoring links to make sure they are valid.

Training New Business Development Advisors

After completing the initial Certification Application, the Peer Coach will advise the Business Development Advisor which modules or other training activities to pursue. A training schedule will then be determined, with specific deadlines for accomplishment.

The Peer Coach may also assign another certified Business Development Advisor to aid and mentor the Business Development Advisor in some of the training activities in Module 6 – 10.

If a Business Development Advisor does not satisfactorily complete a training task, he or she must repeat the task as many times as necessary to reach a satisfactory completion. While listed training tasks may not be eliminated, other tasks may be added.

Recommended Training Deadlines

Module 1 (Code of Professional Performance): Prior to assisting any client

Module 2 (Counseling Techniques): Within 60 days of employment or volunteer appointment

Module 3 and Module 4: Within six months of hire

Certification Requirements

Upon completion of all certification requirements, the Business Development Advisor will be awarded the designation of “Certified Business Development Advisor.”

The ultimate goal of this program is to create both a common body of knowledge and a standard of performance among a diverse group of professionals. All counselors must achieve a common standard of performance and quality. Therefore, a certain amount of flexibility is required to accommodate individual differences, **without changing the standards.**

In order to allow for differences in individual backgrounds, certification credits will be awarded for achievements both within the framework of the professional program (through the completion of training modules) and outside the framework (through other professional accomplishments.)

Certification Credits

Each Business Development Advisor must earn a minimum of 100 certification credits in order to become eligible for the designation of Certified Business Development Advisor.

Depending on the education and experience of a Business Development Advisor, all training modules may or may not be required. Business Development Advisors who meet minimum hiring qualifications should be required to complete the four core modules to become a candidate for certification.

Certification Process

Each Business Development Advisor within the network is expected to complete the Certification Application or Re-Certification Application to analyze his or her eligibility. Each new Business Development Advisor is evaluated by a Peer Coach, using the Certification Application. Upon completion of the four core modules and acquiring of 100 total credits, a Certification Application is completed with other required documentation, to the Center Director for confirmation. Upon confirmation, the Director sends the completed application to the Program Administrator with the following documents:

- A letter of recommendation for certification
- The candidate’s current resume
- Any other pertinent information

Eligibility

All individuals, regardless of education and experience, are required to complete the four core modules to become a candidate for Certified Business Development Advisor.

All full-time and part-time Business Development Advisors are required to be certified Business Development Advisors.

Volunteer and student Business Development Advisors are required, at a minimum, to complete the four core modules. The Center Director may require that all advisors become fully certified.

Certification Requirements (100 Pts)

The aim of the certification program is to certify that Business Development Advisors are well-rounded and competent in multiple facets of small business ownership including marketing, finance, budgeting, record keeping, funding, and business planning.

- a. **Core Modules:** Required four core modules – 20 pts each
 - 1) Module 1 (Code of Professional Performance): Within 30 days
 - 2) Module 2, 3, and 4: Within 90 days of employment or volunteer appointment
- b. **Education:** 5 credits for a degree (bachelor's, master's, doctorate) in a business related field (See chart below) (Max 5)
- c. **Experience:** 5 credits relevant business experience i.e. business owner/manager, CPA, banker, attorney, etc. (See chart below) (Small business ownership must be clearly defined for each function i.e. marketing budget of \$1000/month; Managed \$200,000 annual gross profit utilizing QuickBooks; Wrote Business Plan and updated it annually)
- d. **Additional Modules:** 5 credits for each module 5 – 10 completed.

Business Function	Education (See Below)	Experience (See Below)	Module
Marketing			
Record Keeping			
Finance			
Funding Sources			
Business Planning			

Examples of Degrees and Experience

Note: working in a business, even as a manger, does not indicate the level of experience needed to effectively counsel others in small business functions. Likewise, borrowing money from a bank does not qualify as experience in Funding Sources. If there is even the slightest doubt, taking the module is the easiest way to earn the additional points needed for certification.

Module	Degrees	Experience
Module 5: Marketing	Marketing	Advertising, Business Owner
Module 6: Record Keeping	Finance, MBA	CPA, Business Owner
Module 7: Financial Reporting	Finance, MBA	CPA
Module 8: Funding	Finance	Banker, Loan Officer
Module 9: Business Planning	MBA	Attorney, Business Owner

Re-Certification Requirements (100 Pts)

Every five years, Re-Certification will be granted to the candidate upon accumulation of 100 re-certification credits. The candidate must be a regular or associate member of IESBGA. Only the Certification Committee has the authority to waive any of these requirements.

- a. Purely based on Professional Development
 - i. Required once during five years
 1. Ethics Module
 2. Cross selling Network Services
 - ii. Electives totaling 100 pts. (Center director to confirm attendance)
 1. Additional Modules (5 pts. Each) (Max 40)
 2. Approved list - Global Classroom classes (5 pts. Each) (Max 50)
 3. Approved list - State Conference (5 pts. Each) (Max 25)
 4. National Conference attendance (10 pts. Each) (Max 50)
 - iii. Peer Coach – 5 pts / year (Max 25)
 - iv. Presentation/Workshop (minimum 2 hour class) – 5 pts / class (Max 25)
 - v. Performance – State Evaluation from records and director recommendation

Note: If major changes have occurred in state or federal law, Module 4 - Government Regulations may be recommended.

Advisor Certification Roundtable

(The Roundtable is scheduled for one hour two times each year at the IESBGA Conference in May/June and at the Strategic Planning Meeting in December.)

1. Recognition
 - a. New Peer Coaches
 - b. New Certified Business Development Advisors (Peer Coaches stand and introduce their certified Business Development Advisors.)
 - c. New Business Development Advisor who are working on their certification
2. Roundtable Discussions

Note: There is limited time, notice that the answers are in a one sentence format to ensure that

- a. Ethics
 - i. In one sentence, what is the most important point you remember from the presentation?
 - ii. Present several situations from Module 1 Scenarios. What would you do? Under what circumstance would it be a conflict of interest?
Note: Different scenarios should be presented in the two meetings each year.
 - iii. "Are there any other ethically challenged situations you would like to discuss?"
- b. Counseling Techniques
 - i. In one sentence, what is the most important point you remember from the presentation?
 - ii. Present several situations from Module 2 Scenarios. What would you do?
Are there any other counseling challenged situations you would like to discuss?

- c. Cross-selling Network Services
 - i. In one sentence, what is the most important point you remember from the presentation?
 - ii. When have you referred clients at your center to other network members?
 - iii. Are there any other cross-selling situations you would like to discuss?
- d. Government Regulations
 - i. In one sentence, what is the most important point you remember from the presentation?
 - ii. When do you discuss government policies with your clients?
 - iii. Are there any other government situations you would like to discuss?
- e. Build a Case (as time permits)
 - i. In Module 2, you were given the assignment to “Build a Case.”
- f. Thank everyone for participating and ensure that the roster was signed for credit toward certification or re-certification.

Certification Program Documentation

Each module contained in the eGuide was designed by defining several sections: Performance Goal, Training Tasks, Evaluation Procedures, and topic-specific information. The Performance Goal describes the expected skill or knowledge to be gained by completion of the module. Training Tasks are the activities and assignments that must be satisfactorily completed to attain the performance goal and the Evaluation Procedures outline the methods by which the tasks will be measured. The topic-specific information is basic reference material.

This guide contains references to Web Sites, as well as exercises designed to increase your comfort level with this medium. The eGuide, **BusinessAdvisorCertificationeGuide.pdf**, is available online.

The eGuide is consistent in its presentation of goals and tasks and in its standardization of evaluation criteria, making it easy to go from one learning project to another. It is varied in its training methods, which increases the Business Development Advisor’s ability to absorb information and to reach higher levels of learning, such as conceptual-process and problem solving.

The method used to validate the Business Development Advisor’s understanding of the eLearning Modules is an eForum. The eForum and Modules are located online and walk the Business Development Advisor through the steps necessary to complete certification. Each assignment is predicated on completing previous assignments and tracks successful completion of each assignment in the module.

The Business Development Advisor eForum includes a discussion on each Module and tracks the entries of resources and comments. The completion of each Module requires at least one entry in the eForum covering a resource relevant to the topic or observation that adds value to the conversation. The Certified Business Development Advisors and Peer Coaches will continue to have access to the knowledge and resources posted on the eForum after the candidates complete the certification process.

Because it is a virtual classroom, there are specific expectations identified to enhance the learning experience related to online learning. The most important point is to remember to treat everyone with respect. If you have not had experience working online, please take time to carefully read each of the expectations and ask the Peer Coach any questions to ensure an understanding of the expectations.

Discussion Topics (Business Development Advisor eForum)

Many of the "rules of the road" or protocols that apply to e-mail also apply to the use of discussions. Use the following conventions when composing a discussion posting:

1. During a discussion assignment, deadlines for posting to and replying will be specified with each assignment. It is a good practice to check the discussions multiple times during the week.
2. If you want to send a personal message to the Peer Coach or Supervisor or another Business Development Advisor, use e-mail rather than the discussions (see above E-mail Protocols).
3. Use the appropriate discussion topic; don't post everything on the "Main" discussion Topic. For certification credit, post under the Module's discussion topic.
4. Be patient. Don't expect an immediate response when you send a message.
5. A helpful hint for use with both discussions and e-mail --- Compose your message in your word-processing application in order to check spelling, punctuation, and grammar --- then copy and paste your composition into e-mail or the discussion. This also saves online time.
6. Everyone should feel free to participate in class and online discussions. Regular and meaningful discussion postings enhance the learning process.
7. Respect each other's ideas, feelings, and experience.
8. Be courteous and considerate. It is important to be honest and to express yourself freely, but being considerate of others is just as important and expected online, as it is in the classroom.
9. Explore disagreements and support assertions with data and evidence.
10. "Subject" headings: use something that is descriptive and refer to a particular assignment or discussion topic when applicable. Some assignments will specify the subject heading.
11. Use the "reply" button rather than the "compose" button if you are replying to someone else's posting.
12. Do not use postings such as "I agree," "I don't know either," "Who cares," or "ditto." They do not add to the discussion, take up space on the discussions, and will not be counted for assignment credit.
13. Avoid posting large blocks of text. If you must, break them into paragraphs and use a space between paragraphs.
14. Use the Technical discussion topic for assistance with technical issues. Use the Help discussion topic for questions about course material or assignments. There will be specific discussion topics for particular discussions - pay close attention to the assignment, and post appropriately.

“Classroom” Expectations

The following ground rules are designed to ensure that the modules run smoothly. Please carefully review these expectations, follow them, and encourage others to follow as well.

1. At the Network Meetings, a Business Development Advisor Certification Roundtable may be scheduled in-person. In addition, Roundtables may be scheduled utilizing video conferencing during the year when an in-person meeting can't be scheduled. While working on certification or re-certification, Peer Coaches and Business Development Advisors should plan to attend the Business Development Advisor Certification Roundtables.
2. Academic integrity will be appraised according to the student academic behavior standards of the Illinois SBDC Network.
3. Assignments should be turned in when completed. A delay in turning in assignments may result in a delay in returning the evaluation.
4. Keep up with the reading, modules, Internet assignments, and other online activities. You have chapters, modules, discussion postings, and e-mail messages to read for the course. You will get the most out of the training by keeping up with the reading. Advisors who keep up with the reading tend to do much better than those who do not.
5. Work with others. You are required to make every effort to work effectively and promptly with others in your groups. Fair criticism of your failure to work effectively with others will significantly affect your collaboration and participation. However, you are personally responsible for your own work.

E-mail

E-mail will be an integral part of this course. Make sure you:

1. Check your e-mail frequently for response to assignments submitted, but be patient. Don't expect an immediate response when you send a message. Generally, two days is considered reasonable amount of time to receive a reply.
2. Include "Subject" headings: use something that is descriptive and refer to a particular assignment or topic.
3. Be courteous and considerate. Being honest and expressing yourself freely is very important but being considerate of others online is just as important as in the classroom.
4. Make every effort to be clear. Online communication lacks the nonverbal cues that fill in much of the meaning in face-to-face communication.
5. Do not use all caps. Emails in all caps make the message very hard to read and is considered "shouting." Check spelling, grammar, and punctuation (you may want to compose in a word processor, then cut and paste the message into the discussion or e-mail).
6. Break up large blocks of text into paragraphs and use a space between paragraphs or use bullets if appropriate.
7. Sign your e-mail messages, which is easy when a signature is created and automatically used.
8. Never assume that your e-mail can only be read by you; others may be able to access your mail. Never send or keep anything that you would not mind seeing on the evening news.
9. When addressing the e-mail Include everyone discussed in the e-mail. Don't say anything you don't want anyone to hear.

Viruses

A virus can spell disaster. Your use of a reputable anti-virus program is a requirement for participation in this course (good ones include McAfee or Norton).

Also, back up your files: "My hard drive crashed." "My modem doesn't work." "My printer is out of ink." These are today's equivalents of "My dog ate my homework." And these events really do occur and they are really inconvenient when they do. However, these are not valid excuses for failing to get your work in on time.

Module Process

Introduction to Business Development Advisor Certification is an online presentation that is readily available to all Business Development Advisors. Supporting the modules, the process identifies the registration process, the syllabus, module's expectations, and assignments. Assignments are submitted online while observations are generally in-person. Each Module includes the following components, which are either online, in-person, or utilize a webinar.

Module Structure for Business Development Advisor Certification

Each Module in the program has the same structure to enhance the online learning experience. This outline below is a guide so you know what is expected for completion of each module.

1. eTraining – Online
2. Activities – Online including Reading, YouTube, Research, Observations
3. Counseling Sessions - Online
4. Evaluation – Answer Assessment Questions (100% accuracy)
5. Webinar / Roundtable – Business Development Advisors' Certification Roundtable / Webinar when scheduled

The Modules' assignments are similar but will include specific requirements related to the subject matter presented in the modules. Many of the assessments take advantage of the online features, thus relieving the Peer Coach of the more tedious parts of the certification process.

Typical evaluations might include:

1. Completing the Module eTraining and answering evaluation questions with 100% accuracy
2. Reviewing the module's Counseling Session and answering evaluation questions with 100% accuracy
3. Identifying new resources through research and posting new resources on Business Development Advisor eForum
4. Utilizing Counseling and Self-evaluation Checklist when counseling

Recorded Counseling Sessions are used to simplify the observation and involvement of the Peer Coach who previously were meeting one-on-one with the Business Development Advisor.

Below is a quick overview of each module. Following the Overview of the ten modules is a more detailed description for each module. The module documentation is in the eGuide.

Course Outcomes and Objectives (Required are in Red)	
Course Outcomes	Course Objectives
Module 1: <i>Maintain a Code of Professional Performance</i>	<ul style="list-style-type: none"> • Demonstrate the adherence to the Code of Professional Performance • Understand and comply with the policies and procedures of the host institution • Abide by conflict of interest policies and client confidentiality requirements
Module 2: <i>Utilize effective Counseling Techniques</i>	<ul style="list-style-type: none"> • Display knowledge and use of effective counseling techniques • Identify and assess a client's background and current needs • Utilize effective guidance and coaching techniques to meet client needs
Module 3: <i>Effectively cross-selling Network Services</i>	<ul style="list-style-type: none"> • Demonstrate knowledge and understanding of basic services offered by Network members • Identify and assess a client's needs • Identify which services answer client's needs and make appropriate referrals
Module 4: <i>Understand impact of government regulations</i>	<ul style="list-style-type: none"> • Demonstrate ability to distinguish appropriate business need for regulations • Demonstrate knowledge of sources of information regarding regulations • Coach clients in accessing sources of information
Module 5: <i>Understand the basic marketing including pricing, product design, distribution, and other methods</i>	<ul style="list-style-type: none"> • Develop a marketing plan based on client's needs • Demonstrate knowledge of local library and internet resources used to create a marketing plan • Identify reliable resources to share with other advisors and clients
Module 6: <i>Understand the importance of record keeping and the impact on a small business</i>	<ul style="list-style-type: none"> • Demonstrate knowledge of computer based financial programs • Demonstrate knowledge of budgeting and cash flow statements • Identify financial resources in building a viable budget, i.e. Dave Ramsey • Coach clients in building a sound financial plan
Module 7: <i>Understand how to use financial statements to maximize the potential growth</i>	<ul style="list-style-type: none"> • Demonstrate the ability to identify a break-even point, ratios compared to industry standards, and financial analysis to assist small business owners • Demonstrate the ability to use various financial statements for their intended purpose • Demonstrate familiarity with reports generated by computer software
Module 8: <i>Understand the sources of financing a small business and the impact on the business</i>	<ul style="list-style-type: none"> • Demonstrate knowledge of funding and requirement for approval • Demonstrate knowledge of a variety of funding programs and knowledge of which programs are still available • Demonstrate the ability to assess the client's potential for achieving the desired financing
Module 9: <i>Understand the importance of planning and writing a business plan based on the client's needs</i>	<ul style="list-style-type: none"> • Demonstrate the ability to provide a comprehensive evaluation of a business plan • Identify resources to assist clients in preparing a business plan • Prepare a business plan including assumptions and financials for three years
Module 10: <i>Understand the basic requirements for starting a business</i>	<ul style="list-style-type: none"> • Demonstrate the ability to assess a client's needs and provide appropriate information • Identify resources that will assist clients in covering all things applicable when starting their business • Demonstrate the ability to start a business and answer the questions asked by clients

Module 1 – Code of Professional Performance		
Module 1:1	Webinar/Roundtable	Explains course expectations and process
Module 1:2	YouTube Video	Jim Blasingame Small Business Ethics http://www.youtube.com/watch?v=qnMfP21Mxe8
Module 1:3	eTraining	Module 1 Understand and comply with the policies and procedures established by the host institution, state and federal governments Abide by the conflict of interest policies and client confidentiality requirements
Module 1:4	Activities	Paulina Mangano’s Ethics – YouTube Post reflection on business ethics Conflict of Interest Answer Assessment Questions with 100% Accuracy Ethics Exercises
Module 1:5	Counseling	Counseling Session - Carl Clueless Observations using Self-Evaluation Checklists
Module 1:6	Peer Coach	Ethics Discussion – How to work through the gray matters
Module 1:7	Evaluation	Complete assessment questions 100%

Module 2 – Counseling Techniques		
Module 2:1	Webinar/Roundtable	Explains the search for appropriate materials
Module 2:2	YouTube Video	Southern Illinois University / Illinois SBDC http://youtube.com/YxE02o9aMns
Module 2:3	eTraining	Module 2: Counseling Techniques - Listening, Observation, Problem Solving, Effective Counseling and what would you say to provide the client with options and tools for making sound business decisions
Module 2:4	Activities	YouTube (Relevance) Ten Guidelines for Effective Counseling What Would You Say in these Difficult Situations? Post reflection on effective counseling techniques
Module 2:5	Counseling	Counseling Session – Debbie Doubtful Observations using Self-Evaluation Checklists
Module 2:6	Peer Coach	Effective Counseling Discussion – How to handle difficult situations
Module 2:7	Evaluation	Answer Assessment Questions with 100% Accuracy
Module 2:8	Optional	Training Tasks (Listening, Observation, Problem Solving) Build a Case

Module 3 – Cross-Selling Network Services		
Module 3:1	Webinar/Roundtable	Whom do you know?
Module 3:2	YouTube Video	Illinois State / Illinois SBDC http://www.youtube.com/watch?v=nAe-4x_bnKY
Module 3:3	eTraining	Module 3 Services and special programs offered by all members of Illinois SBDC Network Assess a client's needs, identify which services answer those needs, and make the appropriate referrals.
Module 3:4	Activities	Network member Matrix Post new reference and answer how can it help me to refer a client to someone else? Posting Resources
Module 3:5	Counseling	Counseling Session – Jasmine Jamming Observations using Self-Evaluation Checklists
Module 3:6	Peer Coach	Who's who; How can you help me?
Module 3:7	Evaluation	Answer Assessment Questions with 100% Accuracy

Module 4 – Government Regulations		
Module 4:1	Webinar/Roundtable	We are the government and we are here to help you! The right choice! DCEO!
Module 4:2	YouTube Video	Government Regulation - http://www.smallbusinessspokenhere.com//IESBGA/GovReg/story.html
Module 4:3	eTraining	Module 4 Identify business need for regulations and the applicable regulation(s), sources of information regarding the regulations
Module 4:4	Activities	DCEO Information Center What don't you know? You don't know what you don't know. So, tell me what I don't know. Attendance at a Network Meeting on government regulations Post Resources on the eForum
Module 4:5	Counseling	Counseling Session – The Wright Move Observations using Self-Evaluation Checklists
Module 4:6	Peer Coach	What new laws have passed that affect small business owners and the Illinois SBDC Network
Module 4:7	Evaluation	Answer Assessment Questions with 100% Accuracy

Module 5 – Marketing		
Module 5:1	Webinar/Roundtable	Where in the world do you find your client?
Module 5:2	YouTube Video	7 Touch Marketing Strategies http://www.youtube.com/watch?v=VZzLWC8hxoo
Module 5:3	eTraining	Module 5 Marketing Plan, Market Research and Planning, Marketing Strategy, Network Marketing, Sample Marketing Plan Outline
Module 5:4	Activities	Starting Your Business, Marketing Guidance - A Simple Guide To Your Small Business Marketing Plan, Marketing Plan Outline <i>Read Sources of Market Research</i> Post on a blog marketing ideas that worked Assist one client in preparing a Marketing Plan
Module 5:5	Counseling	Counseling Session – Cathy Crystal Observations using Self-Evaluation Checklists
Module 5:6	Peer Coach	Share experiences from Module 5
Module 5:7	Evaluation	Correctly answer questions in Module 5 assessments

Module 6 – Record Keeping and Budgets		
Module 6:1	Webinar/Roundtable	I need what! I don't know where I put it!
Module 6:2	YouTube Video	Bookkeeping Success http://www.youtube.com/watch?v=ADqmw7mI5GE
Module 6:3	eTraining	Module 6 Why Keep Records? How long are records kept? How to track records, Cash Flow / Budget, Elements of a Complete System
Module 6:4	Activities	<i>DCEO Documentation</i> Complete Online QuickBooks Tutorial, or attend QuickBooks Class; Review Center's resources (i.e. bookkeepers, QuickBooks instructor, CPA) Post in eForum about bookkeeping and/or budgeting Prepare a cash flow statement and budget or assist a client in creating a cash flow statement and budget
Module 6:5	Counseling	Counseling Session – Helen Hectic Observations using Self-Evaluation Checklists
Module 6:6	Peer Coach	Share experiences from Module 6
Module 6:7	Evaluation	Correctly answer questions in Module 6 assessments

Module 7 – Financial Statements		
Module 7:1	Webinar/Roundtable	What is that for? Why do I need it?
Module 7:2	YouTube Video	Financial Series http://www.youtube.com/watch?v=7_bLLUD1how&feature=c4-overview&list=UUxWofAX2yLYK1n14bFar_lg
Module 7:3	eTraining	Module 7 Why financial statements are important, Data Collection and Management, Income Statement, Balance Sheet, Financial Ratios, Key Terms and Concepts “Financial Statements as a Tool”
Module 7:4	Activities	Calculate financial ratios for financing Meet and report on Center resources (CPA and Tax Accountants) Post about financial resources plus reflections on using Financial Statements as tools for business success
Module 7:6	Counseling	Counseling Session – Emily Energetic Observations using Self-Evaluation Checklists
Module 7:7	Peer Coach	Share experiences from Module 7
Module 7:5	Evaluation	Correctly answer questions in Module 7 assessments

Module 8 - Sources and Requirements for Financing		
Module 8:1	Webinar/Roundtable	Are there any grants?
Module 8:2	YouTube Video	A Secret Millionaire http://www.youtube.com/watch?v=ROi_dvOF3SU
Module 8:3	eTraining	Module 8 Sources of funding, Debt Financing, Equity Financing, Working Capital, Collateral, Loans, Bank Visit & Loan Checklist, SBA Programs
Module 8:4	Activities	<i>A Simple Guide to Your Company's Financial Statements, The Small Business Owner's Guide To Financial Control, Understanding Commercial Lending: The Question and Answer Guide;</i> Report results of the interview with the commercial bank loan officer Post about the Good, the Bad, and the Ugly of business funding Post Funding Resource and Gov. funding programs in eForum
Module 8:5	Counseling	Counseling Session – Patti Pitiful Observations using Self-Evaluation Checklists
Module 8:6	Peer Coach	Share experiences from Module 8
Module 8:7	Evaluation	Correctly answer questions in Module 8 assessments

Module 9 – Business Planning		
Module 9:1	Webinar /Roundtable	Fail to plan; plan to fail.
Module 9:2	YouTube Video	Dragon Den Little Bikes http://www.youtube.com/watch?v=0Hoel4XkOpg
Module 9:3	eTraining	Module 9 What is a business plan, Benefits, Components, Writing your plan, Research - Data Resources, Drawbacks / Limitations, Biz Plan Checklist
Module 9:4	Activities	Post business development web sites and products Review the latest copy of “Starting Your Business in Illinois” and “ <i>The Plan: A Step-By-Step Business Plan Workbook</i> ”; Complete Business Planning Software tutorials Post business plan challenges and triumphs Submit a Business Plan for review
Module 9:5	Counseling	Counseling Session – Generous Jo Observations using Self-Evaluation Checklists
Module 9:6	Peer Coach	Share experiences from Module 9
Module 9:7	Evaluation	Correctly answer questions in Module 9 assessments

Module 10 – How to Start Your Business		
Module 10:1	Webinar/Roundtable	Do it!
Module 10:2	YouTube Video	Never Give Up! http://www.youtube.com/watch?v=VZzLWC8hxoo
Module 10:3	eTraining	Module 10 Eight Essential Elements of Starting a Business. Planning, Financing – Bookkeeping, Taxes, Insurance, Legal Issues, Build a Team
Module 10:4	Activities	Review <i>Starting Your Business in Illinois / Business Plan Workbook</i> ; Identify center specific start-up literature for clients Post on the eForum, 1 about obstacles to start a business, Business Start-Up resources, Meet with Center resource (Attorney) and review Center’s function Report Client Start-ups during the past six months
Module 10:5	Counseling	Counseling Session – Mindy Messenger Observations using Self-Evaluation Checklists
Module 10:6	Peer Coach	Share experiences from Module 10
Module 10:7	Evaluation	Correctly answer questions in Module 10 assessments

Certified Business Development Advisor Program

[Click on the links to view Module Outlines](#)

[Module 1: Code of Professional Performance](#)

[Module 2: Counseling Techniques](#)

[Module 3: Cross-Selling Network Services](#)

[Module 4: Government Regulations](#)

[Module 5: Marketing](#)

[Module 6: Record Keeping and Budgets](#)

[Module 7: Financial Statements](#)

[Module 8: Sources and Requirements for Financing](#)

[Module 9: Business Planning](#)

[Module 10: How to Start Your Business](#)

Module 1 - Code of Professional Performance

The Business Development Advisor will understand and comply with the policies and procedures established by the host institution, as well as by all appropriate federal and state agencies. The Business Development Advisor will also abide by the conflict of interest policies and client confidentiality requirements established by the SBDC.

Module Outline

1.1	Expectations ** Webinar	View the Introduction to Business Development Advisor Certification. If there are questions about the program, discuss with the assigned Peer Coach or Supervisor. Set expectations and review process for certification. Review Introduction, Expectations, and eGuides. View Video for an overview of the program.
1.2	Video	YouTube (Jim Blasingame's Small Business Ethics) – Doing the Right Thing Matters! Ethics and professionalism are very important for advisors. However, our actions aren't black and white, so moving through the gray matter can be challenging. http://www.youtube.com/watch?v=qnMfP21Mxe8
1.3	eTraining Modules	Online eTraining Module 1 – View the eTraining and read the eGuide to gain a better understanding of the ethical standards and expectations for our performance. Understand and comply with the policies and procedures established by the host institution, state and federal governments. Abide by the conflict of interest policies and client confidentiality requirements. Module One eTraining Evaluation includes questions covering Module One; Answer assessment questions with 100% Accuracy
1.4	Activities	Articles of Professional Responsibility – (Article included in the eGuide) Prospective and existing owners and managers of small businesses in Illinois rely on the advice of Certified Business Development Advisors. This fact imposes upon the advisor the obligation to maintain high standards of integrity and competence. ArticlesofProfessionalResponsibility.pdf YouTube Video on Small Business Ethics – Listen as a Small Business Development Advisor discusses an example of the gray space of ethics. Paulina Mangano from the Business Centre Newcastle Region (England) has a series of YouTube videos on small business topics. Watch the YouTube Video on Ethics - http://www.youtube.com/watch?v=V9A_tT4IEII Review the Host Institution Policies and Procedures – Obtain copies of the Host Institution (College, Chamber, Economic Center, or Other Organization) Policies and Procedures. Sign the attached form - Policies and Procedures Review, and submit the form for review. PoliciesandProceduresReview.pdf Conflict of Interest – Sign all required documents including the Conflict of Interest. Print and read the attached Conflict of Interest document. Sign and

		<p>submit with a copy for review. ConflictofInterest.pdf</p> <p>Optional Activities (Highly recommended if unsure what is ethical)</p> <p>Ethics Exercises – Discuss with the Peer Coach, either in-person or using video conferencing, the ethics questions in the Ethics Scenarios and Case Studies.</p> <p>Business Ethics – In the Business Development Advisors eForum, post reflections on Business Ethics including challenges, approaches, and examples.</p>
1.5	Counseling	<p>Counseling Session – Carol Clueless - Evaluate Module One Counseling Session utilizing the CounselingChecklist.pdf. Upon completion of the counseling session, answer assessment questions with 100% accuracy.</p> <p>Counseling – Use Preparing for a Counseling Session and Counseling Self-Evaluation Checklist when counseling. PreparingforaCounselingSession.pdf ChecklistforSelfEvaluation.pdf</p>
1.6	Roundtable or Peer Coach	<p>During the Business Development Advisor Roundtable (Webinar or in-person,) the agenda includes discussion on ethics from the Ethics Scenarios and Case Studies, included in the Business Development Advisor Certification eGuide.</p>
1.7	Evaluation	<p>A Peer Coach / Director will verify that the Business Development Advisor completed the following:</p> <ul style="list-style-type: none"> • Module assignments <ul style="list-style-type: none"> ○ eTraining Assessment Questions ○ Counseling Session Assessment Questions ○ Counseling Checklist ○ Preparing for Counseling Session ○ Checklist for Self-Evaluation • Read the Policies and Procedures of the host institution • Signed the conflict of interest statement • Participated in the Business Development Advisor Roundtable or Peer Coach Discussion

Module 2 – Counseling Techniques

Performance Goal

The Business Development Advisor will display knowledge and use of effective counseling techniques in order to identify and assess a client’s background and current needs. These techniques will include interpersonal skills such as receptivity, active listening, empathy, and a positive attitude. The Business Development Advisor will also utilize effective guiding and coaching techniques in order to provide the client with options and tools for making sound business decisions.

Suggested Prerequisite

Module 1: Code of Professional Performance

Module Outline

2.1	Expectations	View the Introduction to Business Development Advisor Certification. If there are questions about the program, contact the Peer Coach or Supervisor. Review Introduction, Expectations, and eGuides.
2.2	Video	YouTube - SIU SBDC is a short video about the Illinois Small Business Development Center at Southern Illinois University. http://youtu.be/YxE02o9aMns
2.3	eTraining Modules	Online eTraining Module 2 – Counseling, Listening, Problem Solving View the eTraining and read the eGuide (this eGuide includes extensive information on counseling) to gain a better understanding of counseling techniques (Listening, Observation, Problem Solving) and the advisor’s role in assessing and meeting client’s needs. The eTraining defines effective counseling and how to provide the client with options and tools for making sound business decisions. Module Two eTraining Evaluation includes questions covering Module Two; Answer assessment questions with 100% accuracy.
2.4	Activities	Ten Guidelines for Effective Counseling – The article “Ten Guidelines for Effective Counseling” is included in the <i>Certified Business Development Advisor eGuide</i> YouTube – Relevance https://www.youtube.com/watch?v=SJUNt18cSEs&list=PLGGcsPtChMLLaOnhVfsaBbe5GEXXvviGL Post observations on counseling techniques include challenges and examples.

2.5	Counseling	<p>Counseling Session – Debbie Doubtful – Evaluate Module Two Counseling Session utilizing the CounselingChecklist.pdf. Upon completion of the counseling session, answer assessment questions with 100% accuracy.</p> <p>Counseling – Use Preparing for a Counseling Session and Counseling Self-Evaluation Checklist when counseling. PreparingforaCounselingSession.pdf ChecklistforSelfEvaluation.pdf</p>
2.6	Roundtable or Peer Coach	The Business Development Advisor Roundtable agenda includes challenges encountered when counseling. To help prepare for the Roundtable, review “How do you deal with difficult people?” (See eGuide for examples.)
2.7	Evaluation	<p>A Peer Coach / Director will verify that the Business Development Advisor completed the following:</p> <ul style="list-style-type: none"> • Module assignments <ul style="list-style-type: none"> ○ eTraining Assessment Questions ○ Counseling Session Assessment Questions ○ Counseling Checklist ○ Preparing for Counseling Session ○ Checklist for Self-Evaluation • Participated in the Business Development Advisor Roundtable or Peer Coach Discussion
2.8	Optional	<p>Training Tasks - Training Tasks (Listening, Observation, Problem Solving) (eGuide)</p> <p>Advisor Case Studies – What Would You Say in these Difficult Situations? (eGuide)</p> <p>Create a Case – This exercise allows the Business Development Advisor to choose a particular counseling tool and match it with a module topic (client issue) for a counseling session to create a “hands-on” case study. The three tools to choose from are: (1) Work Assignment, (2) Problem-Solving, or (3) Information Assessment and Effective Action.</p> <p>Instructions: Choose an issue and one of the Coaching Tools discussed in Module 2. Create your own case study by combining the tool and the issue.</p> <p><i>Example 1:</i> Choose <i>Marketing</i> and the <i>Information Assessment and Effective Action</i> tool. Select a specific topic or issue from within the sequence of events involved in marketing the product or service and run it through the guidelines set forth by the tool. (Where are you in the sequence? What is the information telling you? What is the key question? What kind of action is required?)</p> <p><i>Example 2:</i> Choose the <i>Business Planning</i> and the tool <i>Problem Solving</i>. Together with the client, identify the problem or opportunity (issue) and go through the problem-solving process, step by step.</p> <p>Prepare a document that includes the steps, the client’s feelings about the process, and the effectiveness of the process.</p> <p>Submit observation and resources about counseling techniques in the Business Development Advisor eForum</p>

TRAINING TASKS (Optional)

These six training tasks are designed to demonstrate information presented in this module. The successful completion of these first three exercises will be a part of the evaluation for this module. However, the other three exercises are designed to be used in conjunction with other modules in actual counseling sessions and will need to be completed as a part of those activities. They are included here because they are exercises designed to measure counseling and coaching skills, as well as the particular skill of the module with which they may be associated.

Three simple and quick exercises may be used when meeting in-person.

1. **Listening Exercise.** This exercise demonstrates how difficult active listening and logical thinking can be.
2. **Observation Exercise.** This exercise demonstrates how easy it is to overlook important information and details.
3. **Visualization Exercise.** This exercise demonstrates that we all have the ability to step back, look at a problem from a different perspective, and develop a more creative solution.

Listening Exercise. This exercise demonstrates how difficult active listening and logical thinking can be.

Objective: To demonstrate that few of us really are good listeners.

Procedure: Ask the Business Development Advisor to take a sheet of paper and number it from 1 to

5. Jot down the answers to the five questions. Read each question only once.

- a) Is there any federal law against a man marrying his widow's sister?
- b) Do they have a 4th of July in England?
- c) If you had only one match and entered a cold room that had a kerosene lamp, an oil heater, and a wood stove, which would you light first for maximum heat?
- d) The Cubs and the Sox play 5 baseball games. They each win 3 games. No ties or disputed games are involved. How come?
- e) According to International Law, if an airplane should crash on the exact border between two countries, would unidentified survivors be buried in the country they were traveling to, or the country they were traveling from?

Listening Discussion Questions:

- a) How many questions did the Business Development Advisor get right and wrong?
- b) Why didn't they get a perfect score?
- c) Why is listening called an "Active Process"?
- d) What has the Business Development Advisor learned that can help them to better help their clients?

Answers: a. Yes, b. Yes, c. The Match, d. The two teams were not playing each other, e. Survivors didn't die.

Observation Exercise. This exercise demonstrates how easy it is to overlook important information and details. Pass a watch around the class or visualize a watch you own. Indicate that a watch was found and before it is returned a lists of questions are asked to verify the owner of the watch.

- a) What is the brand name?
- b) What color is the face?
- c) What else is painted on the face?
- d) Does it have Roman or Arabic numerals?
- e) Are all twelve numbers printed on the face?
- f) Does it show the date and day?
- g) Does it have a second hand?

Observation Discussion Questions:

- a) Why aren't we more observant? (Time pressure, lack of concern, taking things for granted, tired, etc.)
- b) In working with clients, what are some incidents where commonplace comments or problems may be overlooked?
- c) What has the Business Development Advisor learned that can help them to better help their clients?

Visualization Exercise. This exercise demonstrates that we all have the ability to step back, look at a problem from a different perspective, and develop a more creative solution. Count the number of squares in the diagram below

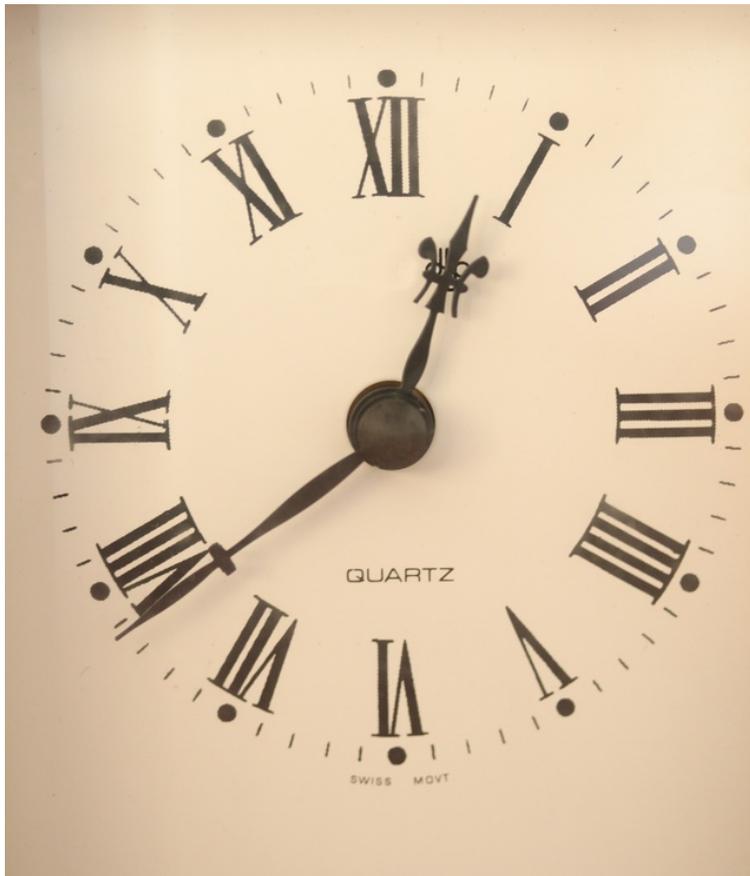
			1.

1. Visualization Discussion Questions:

What prevents us from easily determining the right answer? (We stop at the first possible solution, too rushed, etc.)

How is this exercise like other problems our clients bring to us? (There are many issues within a client's problem.)

How can this exercise help the Business Development Advisor better help her clients?



Module 3 – Cross-Selling Illinois SBDC Network Services

Performance Goal

The Certified Business Development Advisor will demonstrate knowledge and understanding of the basic services offered by all the partners of the Illinois SBDC Network, as well as any specialty programs that may be offered. The Business Development Advisor will be able to assess a client's needs, identify which services answer those needs, and make the appropriate referrals.

Suggested Prerequisites

Module 1 Code of Professional Performance

Module 2 Counseling Techniques

Module Outline

3.1	Expectations	View the Introduction to Business Development Advisor Certification. If there are questions about the program, contact the Peer Coach or Supervisor. Review Introduction, Expectations, and eGuides.
3.2	Video	YouTube – Small Business Administration and SBDC at Illinois State University introducing the Illinois SBDC Network http://www.youtube.com/watch?v=nAe-4x_bnKY
3.3	eTraining Modules	Online eTraining Module 3 – Gain an understanding of the resources in each organization in the Illinois SBDC Network. By assessing a client's needs, identify which services answer those needs, and making the appropriate referrals cross-selling services maximizes the assistance provided to each client. Identify services and special programs offered by all members of Illinois SBDC Network. Module Three eTraining Evaluation includes questions covering Module Three; Answer assessment questions with 100% accuracy.
3.4	Activities	View YouTube Videos – View Network Member's videos and visit their web sites to gain a better understanding of their services. Prepare a matrix of member services and contact information for the Illinois SBDC Network Members. SBA – Small Business Administration PTAC – Procurement and Technical Assistance Center TIES (SIBR – Consultant Introduction to Program) Small Business Incubator – Small Business Incubator Women's Business Development Center – Women's Business Development Center Minority Business Development – Minority Business Development Agency Social Entrepreneurship – Social Entrepreneurism ASBDC Gateway – American Small Business Development Center Gateway Cross-Selling Network Services – After reviewing YouTube introductions to their center and the counselling sessions, post reflections on referring clients to other resources. Clearly articulate the benefit to the clients.

		Post new YouTube videos and explore their web sites that provide a clear picture of the value each member brings to the Network. Review information about Network services on the Internet including reference materials useful for counseling clients, descriptions of Network services, seminar, or workshop handouts, flyers of upcoming events, etc. Submit changes to internet resources to Peer Coach.
3.5	Counseling	<p>Counseling Session – Jasmine Jamming – Review the Counseling Session then answer the assessment questions. Document clients who are referred to other centers and the outcomes, if any, from the referrals.</p> <p>Center Observations – If possible, observe advisors in other centers to enhance the Business Development Advisor’s understanding of cross-selling Illinois SBDC Network services and programs. Coordination and collaboration among centers is recommended to improve the client’s overall effectiveness in starting and growing their small business. Observe organizations including other Network Services where possible, such as:</p> <ul style="list-style-type: none"> • Observe Business Development Advisors and support staff who are responsible for coordinating the services offered by Network Members. Become familiar with their services through research and observation. Observations may be in-person, via conference calls, or recorded as a video. • Spend the day at the reception desk at a Center, observing the person responsible for fielding phone calls and walk-in clients. Take note of the questions asked and the referrals made to other Network services. • If requested, co-counsel with other Business Development Advisors. While observing the sessions, list the services that are cross-sold. After each session, confer with the Business Development Advisor to find out why specific services were recommended. The secret to successful referrals is an understanding of the client’s needs and the matching of those needs with the appropriate services. <p>Counseling – Use Preparing for a Counseling Session and Counseling Self-Evaluation Checklist when counseling.</p> <p>PreparingforaCounselingSession.pdf</p> <p>ChecklistforSelfEvaluation.pdf</p>
3.6	Roundtable or Peer Coach	The Business Development Advisor Roundtable agenda includes examples of cross-selling services. Discuss situations when clients were referred to other centers and the outcomes of the referrals.
3.7	Evaluation	<p>A Peer Coach / Director verify that the Business Development Advisor completed the following:</p> <ul style="list-style-type: none"> • Module assignments <ul style="list-style-type: none"> ○ eTraining Assessment Questions ○ Counseling Session Assessment Questions ○ Matrix of Illinois SBDC Network Members and contact information ○ Document referrals made to other centers and outcomes from the referrals • Participated in a Roundtable or Peer Coach Discussion

3.8	Optional	<p>Vendor Partnerships - Review the vendor partnerships and access their use at the Illinois SBDC Network center. Discuss other partnerships – Research web for information on national, state, & center partners</p> <ul style="list-style-type: none"> a. Partners - Microsoft - YouTube Videos – Microsoft (Other partners include Google) b. QuickBooks for Start-Ups- YouTube Videos – QuickBooks financial programs c. Global Classroom – Global Classroom Website d. Palo Alto – Business Plan Pro / Live Pan Website e. Profit Mastery– Profit Mastery Website f. NxLevel– NxLevel Training Website g. FastTrac– FastTrac Website h. Growth Wheel– Growth Wheel Website <p>Cross-Selling Exercise (See Business Development Advisor Certification eGuide for instructions.)</p>
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CROSS-SELLING EXERCISE

Objective:

To evaluate the Business Development Advisor’s knowledge about the various services and programs offered by the Center and the Network, as well as his or her skill in referring a client to those services and/or programs.

Procedure:

You will need a small box and some brightly colored paper. Cut the paper into pieces of an appropriate size so that you can write the names (one to each slip of paper) of the many services, programs, seminars/workshops, other Business Development Advisors, and other Center functions provided by the Network Members. Fold each slip of paper and place all of them in the box.

The Business Development Advisor will draw the slips of paper out, one at a time, and will answer the following questions:

1. Describe this program, the person’s area of expertise, service, etc.
2. Describe the types of clients who should be referred to this service or Business Development Advisor.

Module 4 – Government Regulations

Performance Goal

The Business Development Advisor will demonstrate the ability to distinguish the appropriate business need for regulations and to identify the specific regulation(s) that apply to the client’s business. The Business Development Advisor will also demonstrate knowledge of sources of information regarding the appropriate regulations and the ability to coach the client in accessing these sources.

Suggested Prerequisites

Module 1	Code of Professional Performance
Module 2	Counseling Techniques
Module 3	Cross-Selling Illinois SBDC Network Services

Module Outline

4.1	Expectations	View the Introduction to Business Development Advisor Certification. If there are questions about the program, contact the Peer Coach or Supervisor. Review Introduction, Expectations, and eGuides.
4.2	Video	<p>Online Government Regulations – View Government Regulations to gain an understanding of the role government plays in small business development.</p> <p>Government Regulations</p> <p>Evaluation includes questions covering Government Regulations to be answered with 100% accuracy.</p>
4.3	eTraining Modules	<p>Online eTraining Module 4 – View the eTraining and read the eGuide to gain a better understanding of the role that the government plays in protecting and supporting small businesses.</p> <p>Module Four eTraining</p> <p>Evaluation includes questions covering Module Four; Answer assessment questions with 100% accuracy.</p>
4.4	Activities	<p>Government Agencies – Visit government agencies designated by a Peer Coach. Collect literature or visit their web site and discuss agency procedures and services during each visit as a means of updating the Illinois SBDC Network Center’s information. Each visit will introduce the Network to the agency and thereby encourage referrals from the agency to the Network Centers.</p> <p>Other Activities</p> <p>Review the government agency materials located within the Illinois SBDC Network Center and online on the agencies web site.</p> <p>Network Meeting – Attend a Network meeting and participate in sessions addressing government regulations.</p>

		<p>Government Resource – Post in the Business Development Advisor eForum resources identifying government agencies and resources that assist entrepreneurs in starting and growing their businesses.</p> <ul style="list-style-type: none"> • Review the government agency materials located within the Illinois SBDC Network Center • Review relevant government agency Web Sites on the Internet <p>Log clients with whom government regulations were discussed.</p>
4.5	Counseling	<p>Counseling Session – The Wright Move – Evaluate Module Four Counseling Session utilizing the CounselingChecklist.pdf. Upon completion of the counseling session, answer assessment questions with 100% accuracy.</p>
4.6	Roundtable or Peer Coach	<p>The Business Development Advisor Roundtable agenda includes changes to government regulations.</p>
4.7	Evaluation	<p>A Peer Coach / Director verify that the Business Development Advisor completed the following:</p> <ul style="list-style-type: none"> • Module assignments <ul style="list-style-type: none"> ○ eTraining Assessment Questions ○ Illinois Regulations Assessment Questions ○ Counseling Session Assessment Questions • Logged clients with whom government regulations were discussed and resulting actions • Prepared Government Matrix with agencies names and updated contact information • Participated in the Business Development Advisor Roundtable or Peer Coach discussion
4.8	Optional	<ol style="list-style-type: none"> 1. Utilize “Preparing for a Counseling Session”, “Counseling Checklist” and “Checklist for Self-Evaluation” when counseling 2. Participate in the Business Development Advisor Roundtable discussion on government regulations and government resources 3. Post observations and resources to Business Development Advisor eForum

Module 5 - MARKETING

Performance Goal

The Business Development Advisor will describe to the client the basic components of marketing, including pricing, product/service design, distribution, and promotional methods. He or she will assess the client's capacity and potential and determine an appropriate feasibility analysis. Based on these results, the Business Development Advisor will assist the client to develop a marketing plan and facilitate the plan's implementation through periodic evaluation and feedback.

Suggested Prerequisites

Core Module 1 – Module 4

Module Outline

5.1	Expectations	View the Introduction to Business Development Advisor Certification. If there are questions about the program, contact the Peer Coach or Supervisor. Review Introduction, Expectations, and eGuides.
5.2	Video	Seven Touch Marketing Strategy - http://www.youtube.com/watch?v=VZzLWC8hxoo
5.3	eTraining Modules	<p>Online eTraining Module 5 – View the eTraining and read the eGuide to gain a better understanding of marketing fundamentals for small business owners including the importance of marketing plans, market research and planning, marketing strategy, network marketing, sample marketing plan outlines and sources of marketing research.</p> <p>Module Five eTraining</p> <p>Evaluation includes questions covering Module Five; Answer assessment questions with 100% accuracy.</p>
5.4	Activities	<p>Read Marketing Documentation – Read the documents listed below that are located on the DCEO Website. Download documents and forms required to complete the assignments including the Marketing Plan.</p> <p>Starting Your Business - <i>Starting Your Business in Illinois</i></p> <p>Marketing Guidance - <i>A Simple Guide To Your Small Business Marketing Plan</i></p> <p>Review the eGuide Appendix Documents - <i>Marketing Plan Outline, Sources of Market Research, and Internet Sources of Market Research</i></p> <p>Visit the Illinois SBDC Network center or host organization library and locate marketing resources that clients can use to develop marketing plans and gain a better understanding of their demographics, competitors, vendors, and customers. Identify current marketing research websites and other marketing resources to share with clients and other advisors.</p> <ul style="list-style-type: none"> • Attend appropriate SBDC seminar(s) as assigned • Review marketing web sites • Analyze the marketing sections of a business plan • Complete exercise “Where to Find the Answers”

5.5	Counseling	Counseling Session – Cathy Crystal – Evaluate Module Five Counseling Session utilizing the CounselingChecklist.pdf . Upon completion of the counseling session, answer assessment questions with 100% accuracy.
5.6	Roundtable or Peer Coach	The Business Development Advisor Roundtable agenda includes time for Business Development Advisors to share experiences in completing Module 5 – Module 10 including the topic of marketing.
5.7	Evaluation	<p>A Peer Coach / Director verify that the Business Development Advisor completed the following:</p> <ul style="list-style-type: none"> • Module assignments <ul style="list-style-type: none"> ○ eTraining Assessment Questions ○ Counseling Session Assessment Questions ○ Assist one client in preparing a Marketing Plan • Participated in the Business Development Advisor Roundtable or Peer Coach Discussion
5.8	Optional	<ol style="list-style-type: none"> 1. Utilize “Preparing for a Counseling Session”, “Counseling Checklist” and “Checklist for Self-Evaluation” when counseling 2. Participate in the Business Development Advisor Roundtable discussing marketing 3. Post observations and resources to Business Development Advisor eForum

Module 6 – Record Keeping and Budgets

Performance Goal

The Business Development Advisor will, as a part of the first counseling session with a new client, assess the client's knowledge of budgeting and record keeping. The Business Development Advisor will explain the importance of budgeting and of keeping complete and accurate records and will define the necessary elements of a complete system.

Suggested Prerequisites

Core Module 1 – Module 4

Module Outline

6.1	Expectations	View the Introduction to Business Development Advisor Certification. If there are questions about the program, contact the Peer Coach or Supervisor. Review Introduction, Expectations, and eGuides.
6.2	Video	Bookkeeping Success http://www.youtube.com/watch?v=ADqmw7ml5GE
6.3	eTraining Modules	Online eTraining Module 6 – View the eTraining and read the eGuide to gain a better understanding of the importance of budgeting, record keeping, and bookkeeping. Module Six eTraining Evaluation includes questions covering Module Six; Answer assessment questions with 100% accuracy.
6.4	Activities	Download and Read – Documents located on the DCEO Website. The actual link and available documents may change when documents are updated. http://www.illinois.gov/dceo/SmallBizAssistance/Pages/default.aspx <i>Starting Your Business in Illinois; A Simple Guide to Your Company's Financial Statements, The Small Business Owner's Guide To Financial Control, Understanding Commercial Lending: The Question and Answer</i> Cash Flow Statement or Budget - Assist at least one client in developing a cash flow statement or budget. If required, with a co-counselor, assist a client in listing the records to be kept to prepare a budget and financial reports for tax purposes. Complete Online QuickBooks Tutorial, attend a QuickBooks Class, or other center approved financial tracking software class Visit at least two Web Sites that provide information on Budgeting Bookkeeping – Post reflections on the Business Development Advisor eForum regarding when records matter and what issues may occur if records are not maintained properly.

		Post information on Bookkeeping/Record Keeping resources on the Business Development Advisor eForum.
6.5	Counseling	Counseling Session – Helen Hectic – Evaluate Module Six Counseling Session utilizing the CounselingChecklist.pdf . Upon completion of the counseling session, answer assessment questions with 100% accuracy.
6.6	Roundtable or Peer Coach	The Business Development Advisor Roundtable agenda includes time for Business Development Advisors to share experiences in completing Module 5 – Module 10 including recordkeeping and budgets.
6.7	Evaluation	A Peer Coach / Director verify that the Business Development Advisor completed the following: <ul style="list-style-type: none"> • Module assignments <ul style="list-style-type: none"> ○ eTraining Assessment Questions ○ Counseling Session Assessment Questions ○ Assist at least one client in developing a cash flow statement or budget. • Participated in the Business Development Advisor Roundtable or Peer Coach Discussion
6.8	Optional	<ul style="list-style-type: none"> • Utilize “Preparing for a Counseling Session”, “Counseling Checklist” and “Checklist for Self-Evaluation” when counseling • Participate in the Business Development Advisor Roundtable discussing budgeting • Post bookkeeping and budgeting observations and resources to Business Development Advisor eForum

Module 7 – Financial Statements

Performance Goal

The Business Development Advisor will assist the client to identify and review financial statements. Particular attention will be given to the explanation and comparison of profit and loss statements, cash flow statements, and balance sheets. The Business Development Advisor will also be able to assist the client in identifying and using other financial information such as the break-even point, debt-to-equity ratio, comparison to industry standards, and capital required.

Suggested Prerequisites

Core Module 1 – Module 4

Module Outline

7.1	Expectations	View the Introduction to Business Development Advisor Certification. If there are questions about the program, contact the Peer Coach or Supervisor. Review Introduction, Expectations, and eGuides.
7.2	Video	Financial Series http://www.youtube.com/watch?v=7_bLLUD1how&feature=c4-overview&list=UUxWofAX2yYK1nI4bFar_Ig
7.3	eTraining Modules	Online eTraining Module 7 – View the eTraining and read the eGuide to gain a better understanding of the basic components of financial analysis including why financial statements are important, data collection and management, income statements, balance sheets, financial ratios, key terms and concepts to understand “Financial Statements as a Tool”. Module Seven eTraining Evaluation includes questions covering Module Seven; Answer assessment questions with 100% accuracy.
7.4	Activities	Download and Read – Documents located on the DCEO Website. The actual link may change when documents are updated or rewritten. <i>Starting Your Business in Illinois; A Simple Guide to Your Company’s Financial Statements, The Small Business Owner’s Guide To Financial Control, Understanding Commercial Lending: The Question and Answer.</i> Complete a financial competence computer-based training program. Demonstrate the ability to calculate correctly the break-even point, debt to equity ratio, comparison to industry standards, and capital required for financing, using actual client information. Review Center specific resources (CPA and Tax Accountants); meet in person, report to supervisor observations about the Center specific resources. Post reflections on the use of Financial tools available to the center.

7.5	Counseling	Counseling Session – Energetic Emily – Evaluate Module Seven Counseling Session utilizing the CounselingChecklist.pdf . Upon completion of the counseling session, answer assessment questions with 100% accuracy.
7.6	Roundtable or Peer Coach	The Business Development Advisor Roundtable agenda includes time for Business Development Advisors to share experiences in completing Module 5 – Module 10 including discussion on using Financial Statements.
7.7	Evaluation	<p>A Peer Coach / Director verify that the Business Development Advisor completed the following:</p> <ul style="list-style-type: none"> • Module assignments <ul style="list-style-type: none"> ○ eTraining Assessment Questions ○ Counseling Session Assessment Questions ○ Assist at least one client in developing a break-even point and financial statements • Participated in the Business Development Advisor Roundtable or Peer Coach Discussion
7.8	Optional	<ol style="list-style-type: none"> 1. Assume Earl gets a loan of \$32,000 for 5 years at 10% interest: monthly payment of \$679.91, with first year’s interest of \$2,966 and principal of \$5,192.58. What is his debt to equity ratio, before a loan, and after the loan? Please show calculations. (Same assumptions as above.) 2. Utilize “Preparing for a Counseling Session”, “Counseling Checklist” and “Checklist for Self-Evaluation” when counseling 3. Participate in the Business Development Advisor Roundtable discussion on pricing 4. Post observation and resources on financial statements in the Business Development Advisor eForum or other approved blog, Share reflections on the use of financial tools available to the center.

Module 8 – Sources and Requirements for Financing

Performance Goal

The Business Development Advisor will accurately assess the client's potential for obtaining financing and counsel the client on the requirements for attaining such financing. The Business Development Advisor will match resources to the client's needs and will document the client's success or failure to obtain financing.

Suggested Prerequisites

Core Module 1 – Module 4

Module 7: Financial Statements

Module Outline

8.1	Expectations	View the Introduction to Business Development Advisor Certification. If there are questions about the program, contact the Peer Coach or Supervisor. Review Introduction, Expectations, and eGuides.
8.2	Video	The Secret Millionaire – http://www.youtube.com/watch?v=ROI_dvOF3SU
8.3	eTraining Modules	<p>Online eTraining Module 8 – View the eTraining and read the eGuide to gain a better understanding of assessing the client's potential for obtaining financing and counsel the client on the requirements for attaining such financing including sources of funding, debt financing, equity financing, working capital, collateral, applying for a loan, bank visit and loan checklist and SBA programs.</p> <p>Module Eight eTraining</p> <p>Evaluation includes questions covering Module Eight; Answer assessment questions with 100% accuracy.</p>
8.4	Activities	<p>Download and Read – Documents located on the DCEO Website. The actual link may change when documents are updated or rewritten</p> <p><i>Starting Your Business in Illinois; A Simple Guide to Your Company's Financial Statements, The Small Business Owner's Guide To Financial Control, Understanding Commercial Lending: The Question and Answer</i></p> <p>Interview a commercial bank loan officer to update the Center's information then report the results of the interview to the center's director.</p> <p>Review DCEO's database of federal and state programs, DCEO's procedures and guidelines, SBA online, and local databases or resource listings. Discuss the assessment of a client's potential to achieve financing, communicate to the client the requirements, and refer the client to the appropriate resources.</p> <p>Attend SBDC or SBA funding seminars as specified Peer Coach / Center Director.</p> <p>Funding Sources</p> <p>Document the success or failure of the Illinois SBDC Network client to obtain</p>

		financing in the Center’s tracking program.
8.5	Counseling	Counseling Session – Patti Pitiful – Evaluate Module Eight Counseling Session utilizing the CounselingChecklist.pdf . Upon completion of the counseling session, answer assessment questions with 100% accuracy.
8.6	Roundtable or Peer Coach	The Business Development Advisor Roundtable agenda includes time for Business Development Advisors to share experiences in completing Module 5 – Module 10 and funding sources.
8.7	Evaluation	A Peer Coach / Director will verify the Business Development Advisor completed the following: <ul style="list-style-type: none"> • Module assignments <ul style="list-style-type: none"> ○ eTraining Assessment Questions ○ Counseling Session Assessment Questions ○ Assist at least one client in developing a list of funding sources and documenting the client’s potential for achieving their desired funding • Participated in the Business Development Advisor Roundtable or Peer Coach Discussion
8.8	Optional	<ol style="list-style-type: none"> 1. Utilize “Preparing for a Counseling Session”, “Counseling Checklist” and “Checklist for Self-Evaluation” when counseling 2. Participate in the Business Development Advisor Roundtable discussion on funding 3. Post observation and resources on funding small businesses in the Business Development Advisor eForum or other approved blog

Module 9 – Business Planning

Performance Goal

The Business Development Advisor will, as a part of the first counseling session with a client, communicate the importance of a business plan. He or she will explain the various purposes for writing the plan and will also identify and define the basic requirements of the plan, including business description, marketing, management, operations, and financing. The Business Development Advisor will be able to identify key terms and will demonstrate the ability to assemble and evaluate a complete business plan.

Suggested Prerequisites

Core Module 1 – Module 4

Module Outline

9.1	Expectations	View the Introduction to Business Development Advisor Certification. If there are questions about the program, contact the Peer Coach or Supervisor. Review Introduction, Expectations, and eGuides.
9.2	Video	Dragon Den Little Bikes – http://www.youtube.com/watch?v=0Hoel4XkOpg
9.3	eTraining Modules	Online eTraining Module 9 – View the eTraining and read the eGuide to gain a better understanding of a business plan including the various purposes for writing the plan and identifying and defining the basic requirements of the plan, including business description, marketing, management, operations, and financing, what is a business plan, benefits, components, writing the plan, research, data resources, Drawbacks and limitations and business plan checklist. Module Nine eTraining Evaluation includes questions covering Module Nine; Answer assessment questions with 100% accuracy.
9.4	Activities	Download and Read – Documents located on the DCEO Website. The actual link may change when documents are updated or rewritten. <i>Review Starting Your Business in Illinois, The Plan: A Step-By-Step Business Plan Workbook</i> View computer software materials and tutorials available to the Illinois SBDC Network Center. Review business-plan development web sites and post changes to the Business Development Advisor eForum. Analyze sample business plans as assigned, including the one furnished as part of the First Stop Booklet, Starting Your Business in Illinois, and discuss conclusions with a Peer Coach.

		<p>Business Planning – Post reflections on the Business Development Advisor eForum regarding business plan challenges and triumphs, drawing on personal experiences and experiences clients are willing to share.</p> <p>Post business development resources on the Business Development Advisor eForum.</p> <p>Prepare a Business Plan or assist a client in preparing a Business Plan.</p>
9.5	Counseling	<p>Counseling Session – Generous Jo – Evaluate Module Nine Counseling Session utilizing the CounselingChecklist.pdf. Upon completion of the counseling session, answer assessment questions with 100% accuracy.</p>
9.6	Roundtable or Peer Coach	<p>The Business Development Advisor Roundtable agenda includes time for Business Development Advisors to share experiences in completing Module 5 – Module 10 including writing a business plan.</p>
9.7	Evaluation	<p>A Peer Coach / Director verify that the Business Development Advisor completed the following:</p> <ul style="list-style-type: none"> • Module assignments <ul style="list-style-type: none"> ○ eTraining Assessment Questions ○ Counseling Session Assessment Questions ○ Providing a comprehensive evaluation of the business plans reviewed • Participated in the Business Development Advisor Roundtable or Peer Coach Discussion
9.8	Optional	<ol style="list-style-type: none"> 1. Utilize “Preparing for a Counseling Session”, “Counseling Checklist” and “Checklist for Self-Evaluation” when counseling 2. Participate in the Business Development Advisor Roundtable discussion on funding 3. Post business development resources on the Business Development Advisor eForum or other approved method.

Module 10 – How to Start Your New Business

Performance Goal

The Business Development Advisor will assess the start-up client's need for information, identify, and explain the basic requirements for starting a new business. The Business Development Advisor will also match the client's needs to the corresponding Illinois SBDC Network resource and refer the client to the appropriate Illinois SBDC Network partner for further counseling.

Suggested Prerequisites

Core Module 1 – Module 4

Module 5: Marketing

Module 6: Record Keeping and Budgets

Module 7: Financial Statements

Module 8: Sources and Requirements for Financing

Module 9: Business Planning

Module Outline

10.1	Expectations	View the Introduction to Business Development Advisor Certification. If there are questions about the program, contact the Peer Coach or Supervisor. Review Introduction, Expectations, and eGuides.
10.2	Video	YouTube – Never Give Up! http://www.youtube.com/watch?v=9ZnIB9fG39E
10.3	eTraining Modules	Online eTraining Module 10 – View the eTraining and read the eGuide to be prepared to assess the start-up client's need for information; identify, and explain the basic requirements for starting a new business. Examine <i>Eight Essential Elements of Starting a Business</i> and consider the impact on starting a business regarding planning, financing – bookkeeping, taxes, insurance, legal issues, finding help, and building a business team. Module Ten eTraining Evaluation includes questions covering Module Ten; Answer assessment questions with 100% accuracy.
10.4	Activities	Download and Read – Documents located on the DCEO Website. The actual link may change when documents are updated or rewritten Review <i>Starting Your Business in Illinois, The Plan: A Step-By-Step Business Plan Workbook</i> Attend at least one seminar concerning how to start a new business Report to a Peer Coach or Director the results of the interview with the attorneys provided to clients as resources. Post reflections on the Business Development Advisor eForum about obstacles to

		<p>starting a business and how to succeed.</p> <p>Post business start-up resources on the Business Development Advisor eForum.</p> <p>List resources provided to new clients; list recommendations for change.</p> <p>Report Client Start-ups during the past six months</p>
10.5	Counseling	<p>Counseling Session – Mindy Messenger – Evaluate Module Ten Counseling Session utilizing the CounselingChecklist.pdf. Upon completion of the counseling session, answer assessment questions with 100% accuracy.</p>
10.6	Roundtable or Peer Coach	<p>The Business Development Advisor Roundtable agenda includes time for Business Development Advisors to share experiences in completing Module 5 – Module 10 including the challenges of starting a new business.</p>
10.7	Evaluation	<p>A Peer Coach / Director verify that the Business Development Advisor completed the following:</p> <ul style="list-style-type: none"> • Module assignments <ul style="list-style-type: none"> ○ eTraining Assessment Questions ○ Counseling Session Assessment Questions ○ Report Client Start-ups during the past six months • Participated in the Business Development Advisor Roundtable or Peer Coach Discussion
10.8	Optional	<ol style="list-style-type: none"> 1. Utilize “Preparing for a Counseling Session”, “Counseling Checklist” and “Checklist for Self-Evaluation” when counseling 2. Participated in the Business Development Advisor Roundtable on resources for new business start-ups 3. Post business start-up resources on the Business Development Advisor eForum or use another approved method to share resources.

History of the Certification Program

The implementation of a formalized professional training and certification program for the Illinois SBDC Network began in 1993 under Illinois Small Business Center Network as one of the primary goals established in the Illinois SBDC Network Strategic Planning process.

Illinois SBDC Network includes a division of the Department of Commerce and Economic Opportunity (DCEO), which is the Lead Center for the SBDC program in Illinois; members of DCEO's Small Business Development Advisory Committee, and the Business and Technical Assistance centers which are located throughout the State. These centers include: Small Business Development Centers (SBDC), Procurement Technical Assistance Centers (PTAC), International Trade Centers (ITC), Small Business Incubators (SBI) and Small Business Innovation Research (SBIR) Centers.

The Illinois SBDC Network's purpose for developing and implementing a formalized professional and certification program was to establish minimum standards for the initial certification and continuing education requirements for all directors. Additionally, the professional and certification program would facilitate the training of new staff in each of the centers.

In 1995, the overall responsibility for establishing the professional and certification program was assumed by the Illinois Small Business Development Association, a 501(c)(3) organization. The cost of developing and implementing the professional and certification program would be funded by the ISBDA with a grant from DCCA.

After reviewing other professional development/certification programs, participation in the 1996 Florida SBDC Network annual Professional Conference and a detailed review and evaluation of their Professional and Certification Program, the ISBDA contracted with Kathie Holland of Certified Management Consultants, the developer of Florida's program, to develop the Illinois program. The needs assessment process began with interviews and surveys at the ISBDA Quarterly meeting in February 1997, with the results presented at the next ISBDA meeting in May 1997. Based on a discussion of these results, specific training modules and objectives for each module were identified.

Implementation of the professional and certification program began at the ISBDA's Fall Quarter Meeting in 1997, with the presentation of the first two training modules, Peer Coach / Mentor training, and the formation of the Certification Committee.

ISBDA was renamed Illinois Entrepreneur and Small Business Growth Association (IESBGA) and IEN became the Illinois SBDC Network. The training was transferred to an on-line version in 2014.

Questions and Answers

Why is there a certification Program?

DCEO requires centers to have professional development objectives, including a certification process.

Who should be certified?

DCEO expects all network advisors to be certified, however this is not written into the grant agreement as a “requirement.”

How does IESBGA fit into the certification process?

IESBGA is tasked with certifying and re-certifying as part of their professional development responsibilities.

What exactly is required to become a Certified Business Development Advisor?

Successful completion of the first four modules is required for certification. They include Code of Professional Performance, Counseling Techniques, Cross-Selling Illinois SBDC Network Services, and Government Regulations.

What is included in the six optional modules and why are they optional?

Many advisors come from a strong business background so much of the information in the optional modules will be redundant to them. The modules cover small business basics: Marketing, Financial Reports, Budgeting, Record-Keeping, Funding, Business Planning, and Starting Your Business.

How long do I have to complete each module?

Once enrolled you will have access to the modules indefinitely. However, it is recommended that you complete the first two modules before you start counseling clients then take Modules 3 & 4 as soon as possible, but at least within 60 days.

Which optional modules should I take?

The six optional modules are designed for you to take when and if you feel the need to increase your knowledge in specific areas. A CPA who is counseling may not need to take the three financial modules (6 – 8) but may want to take Module 5 which covers marketing. The short answer is that it depends on the Business Development Advisor.

Will there be additional Modules?

Additional modules are not planned, however, feel free to submit your recommendations along with recommended changes to the existing modules.

For information about IESBGA: call (1-800-252-2923) ienconnect@mailmw.custhelp.com

Technical Support: Small Business Spoken Here - Instructor@SmallBusinessSpokenHere.us

About the Facilitators

As Illinois Small Business Development Center certified Business Development Advisors with over



ten years of experience, Joanne Osmond and

Claudia Pannell helped hundreds of small business owners find their path to success.

Offering one-on-one consulting targeted to small businesses and entrepreneurs, they are dedicated to providing the best advice and resources. They are trusted business partners offering expert advice on business plans and development, loan readiness, financial, marketing, and operations.

They have facilitated a variety of business

workshops to sharpen the entrepreneur's skills and developed their own courseware and workbooks for in-person classes before turning their focus to online training and counseling. Today, they combine online and in person programs together by offering blended learning experiences; the best of both worlds.

Pannell holds an undergraduate degree in business and a MBA from the University of Dallas.

Osmond received an undergraduate degree in education from Purdue University and an MBA from Webster University.

Please contact us if you have any questions or changes you would like to see in this program.

Instructor@SmallBusinessSpokenHere.com