



BUSINESS RESOURCE SERVICES

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Dear SBDC Center Director:

You have an excellent opportunity to bring on-demand financial training to your Center by having your Counselors trained as Profit Mastery Certified Facilitators or Consultants and by offering the Profit Mastery® University online video financial training curriculum to your clients as a self-study.

Steve LeFever, the Chairman of Business Resource Services has been presenting BRS's Profit Mastery programs to top reviews at the ASBDC national conferences over the last 10 years. He is very well known within the SBDC network as an excellent presenter of complex, yet extremely vital financial information for small business owners. He has over 25 years of experience teaching finance around the world to entrepreneurs, CPAs, bankers, networks of business owners, and SBDC Counselors at regional and national conferences and is always a top rated speaker at every event.

We are now offering the complete Profit Mastery program through our new Profit Mastery University online videos which capture the effectiveness of his presentation. The SBDC counselors that are using the program for financial training are very pleased with the results with their clients. We and many SBDC counselors believe that the Profit Mastery curriculum is the absolute best financial training program available today for their own professional development as well as increasing the financial acumen of their clients.

We have carefully researched the needs of the SBDC networks' deliverables and obligations. We believe that Profit Mastery aligns directly with your needs in the following ways:

1. **Entrepreneurial Finance** is one of the core competencies of all SBDC centers and Profit Mastery enables any Counselor to provide high level, in-depth instruction to their clients, on-demand, when they are ready to improve their own financial acumen and the management of their businesses.
2. **Provides Cash Flow** to the Center in two ways. First, through the sale of the Profit Mastery workbook to clients who participate in Facilitator led programs. The cost to the Center of the workbook is \$195, and Centers are pricing it at between \$295 and \$395, depending on the vitality of their economic area. Second, by receiving a 15% referral fee (presently about \$60) for every client that registers for the Profit Mastery University program; (please see the information below).
3. **Qualifies prospective clients** by having them commit to invest in their own training. This helps raise the quality of continuous clients that SBDC counselors advise and weeds out those that waste counselor time.
4. **Builds in-depth Client Direct Contact hours**, as all one-on-one time spent with a client using the Profit Mastery curriculum to improve the financial management of their company can be counted as Direct Contact hours. In addition, the Action Steps that are identified as part of the coursework become the framework for extended, in-depth consulting which makes the business owner accountable.

5. **Builds Client Preparation Time**, as all work that a Counselor does in preparing follow-up financial analysis with the clients' own numbers qualifies as Client Preparation time. This activity is particularly beneficial to the client and drives the 'measurement' process taught in the program directly into the management of the company.

There are now two levels of training and utilization for SBDC counselors to access the Profit Mastery Curriculum.

1: The present Certified Facilitator program is as follows: The Center will buy a License agreement for \$595. Certified Facilitators will now use the Profit Mastery University online videos to present the program in a classroom setting and will receive their own username and password at the conclusion of training.

A Center can train as many Certified Facilitators from that Center who wish to present the program. Each Certified Facilitator will purchase a Facilitator's Guide for \$395 and complete training at a cost of \$350 per person, for a cost of \$745 per Facilitator (plus the \$595 Center licensing fee.)

2: The Profit Mastery Consultant (PMC) designation: This option is for the SBDC counselors who are interested in the Profit Mastery curriculum as a tool for one-on-one counseling activities with their clients, but who do not wish to teach Profit Mastery using the video program in a classroom setting. Centers purchase a license agreement for \$595. PMCs must then complete the online Profit Mastery University curriculum.

PMCs can do one-on-one advising with their clients but will not be authorized to teach the curriculum in a classroom setting. Instead, they will have the option to refer their clients who are interested in additional financial education to the Profit Mastery University (PMU) website. After the client has gone through the course, both the SBDC counselor and client will be able to work together to implement the Profit Mastery financial performance tools in their business.

The cost for the SBDC client to enroll in Profit Mastery University via a referral from an SBDC counselor, will be \$395. With every referral, a Center will receive a 15% (presently about \$60) rebate per registrant. Each registrant will receive a complete Participant's Guide shipped directly from BRS, to use with the online curriculum and with their ongoing counseling activities with their SBDC advisor.

Profit Mastery Consultants can become Certified Facilitators: The PMC would be required to purchase a Facilitators Guide for \$395 and schedule a two hour conference call with Rod Bristol to review the facilitator scripts and review materials prior to teaching their first class. There is no charge for the conference call training.

I am hoping that these changes will enable more Centers to take advantage of the Profit Mastery education and produce revenue for Centers both through offering classes by Certified Facilitators, taking the online instruction themselves and by receiving rebates for clients who attend Profit Mastery University.

Pricing examples:

A Center that has one counselor that wants to be a PMC.

One License agreement	\$ 595
PMU online training including a Participant's Guide	\$ 395

Total investment: \$ 990

A Center that has two counselors that want to be PMCs and one that wants to be a Certified Facilitator:

One License agreement	\$ 595
PMU online training for 2 PMCs at \$395 each	\$ 790
One Facilitator's Guide at \$395	\$ 395
Two day training for 1 Facilitator at \$350	<u>\$ 350</u>

Total investment: \$2,130

A Counselor enrolls in PMU and takes the course as a self-study:

PMU registration fee:	\$ 395
Rebate back to the Center:	<u>\$ 60</u>

Total investment: \$ 335

We are confident that the Profit Mastery curriculum offers an unparalleled opportunity for both the SBDC and your clients to bring an internationally acclaimed, unique, effective and flexible program to your Center educational resources. We appreciate your consideration and look forward to serving you with this critically important financial education program.

Sincerely,



Rod Bristol

Vice President

The Similarities/Differences Between a Certified Facilitator and a Profit Mastery Consultant

<u>Certified Facilitator</u>	<u>Profit Mastery Consultant (PMC)</u>
<ul style="list-style-type: none"> • Must purchase licensing agreement (\$595) 	<ul style="list-style-type: none"> • Must purchase licensing agreement (\$595)
<ul style="list-style-type: none"> • A center can train as many of their Counselors into Facilitators or PMC's after purchasing the licensing agreement 	<ul style="list-style-type: none"> • A center can train as many of their Counselors into PMC's or Facilitators after purchasing the licensing agreement
<ul style="list-style-type: none"> • Will purchase a Facilitator's Guide for \$395 for use during their live training: Includes all the Participant Guide's material, along with supplemental material intended to assist in teaching the curriculum accurately and efficiently. 	<ul style="list-style-type: none"> • Will receive a Participant's Guide for use during their online training: a manual that follows the course as an attendee.
<ul style="list-style-type: none"> • Must attend live two day training for \$350 	<ul style="list-style-type: none"> • Must complete PMU online training for \$395
<ul style="list-style-type: none"> • Authorized to present the full program in a classroom setting 	<ul style="list-style-type: none"> • <u>Not authorized</u> to present the program in a classroom setting
<ul style="list-style-type: none"> • Each client attendee is expected to purchase a Participant Guide for classes taught by a Certified Facilitator. CFs can present one complete Section to a Client using the online program. 	<ul style="list-style-type: none"> • Can use <u>tools</u> and <u>ideas</u> from the Profit Mastery curriculum for one-on-one counseling and advising and can present one complete Section to a Client using the online video program.
<ul style="list-style-type: none"> • Will receive a username and password to access the online video 24/7/365 	<ul style="list-style-type: none"> • Will receive a username and password to access the online video 24/7/365
<ul style="list-style-type: none"> • Can also work with client(s) side-by-side working through certain modules and/or the whole Profit Mastery online curriculum: recommended that your client purchases a Participant Guide during this process as well so that they will have their own book to work through the Profit Mastery curriculum 	<ul style="list-style-type: none"> • Must <u>refer</u> client to purchase the <i>Profit Mastery University</i> program if the client would like to take the program • Can work with a client in a one-on-one setting to help them better understand their Profit Mastery University online training once they have purchased PMU themselves
<ul style="list-style-type: none"> • Will have access to full administrative support for marketing their training sessions, putting together training timelines, and any other support needed for a successful training session 	<ul style="list-style-type: none"> • Will have access to full administrative support to market <i>Profit Mastery University</i> to their clients. Each center will receive a 15% rebate (presently about \$60) for every SBDC client that signs up for PMU.

***Profit Mastery Consultants can become Certified Facilitators:** The PMC would be required to purchase a Facilitators Guide for \$395 and schedule a two hour conference call with Rod Bristol to review the facilitator scripts and review materials prior to teaching their first class. There is no charge for the conference call training.