SBDC Profit Mastery implementation plan

Selection of the Profit Mastery key contact person

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This person should be charged with the responsibility of completing a successful Profit Mastery implementation in the state. They should have access to every center director and when implementation steps are specified, they should be able to require completion.

This person will coordinate directly with Rod Bristol on all Profit Mastery related communications out to the SBDC network. This person will have a monthly scheduled telephone call with Rod to monitor progress and provide feedback to Profit Mastery corporate on the implementation process.

Shipment of the included Participant's Guides

The Master Contract includes Participant's Guides which are shipped to a central distribution point in the state. These Participant's Guides will be utilized by both your state counselors and clients who complete the Profit Mastery curriculum. These books need to arrive at the training location prior to beginning the counselor/client training programs mentioned below.

Schedule and complete the Profit Mastery counselor/client training program(s) with Rod Bristol

The Master Contract calls for one scheduled two day program. We should schedule this training as quickly as possible to get the information to the counselors.

We recognize that getting counselors together for two days can be very challenging. So, another option would be to do two, one day programs, and then requiring the counselors to complete the second day through the online curriculum. These two programs would need to be completed within the same travel week. We are open to either suggestion, and want to serve your network in what ever manner is most effective for you.

When training is completed, counselors who wish to become Certified Facilitators will need to acquire a Facilitator's Guide and schedule a Facilitator's Guide orientation call with Rod, who will then certify them to teach the curriculum in a live/facilitated video classroom setting.

Review and approve the Profit Mastery website, shopping cart, and promotional materials

A website, shopping cart and promotional materials will be created specifically for your SBDC network. These items need to be reviewed and approved. The website then needs to be linked to the statewide centers websites. We will need to carefully coordinate with your Center IT persons and Landon Leadbetter on our staff to complete this process.

Access to this shopping cart needs to be very carefully controlled, as it provides free registration to the Profit Mastery online curriculum. We suggest that only approved clients of your network be given access to this website. We carefully monitor the registration information from each registrant to be sure that only individuals from your state are utilizing this site.

When the promotional materials are approved, brochures should be placed in every center and provided to every referral partner within the state network.

Complete a Conference call with the Network

Prepare and approve the PM agenda for the call:

Centers linked to the PM website
Control of access via password
Intake process for clients reviewed: App and Form 641
Registering online and completing the course
Promotional items ready: Brochures, Press Releases for every Center,
Roll out date approved

Schedule and complete two informational webinars for key referral partners such as banks and CPA firms

These short, 20 min. webinars are an ideal way to communicate to your partners about the Profit Mastery initiative. The goal of the webinar is to explain to a possible referral partner what their clients will learn as a result of taking the class. These have proven to be effective programs to expand the awareness of the Profit Mastery initiative in a state.

We will use our GoToMeeting platform and will provide webinar invitation information to every center which they can then forward to their potential attendees.

Roll out the Profit Mastery promotional program to all clients and stakeholders of your SBDC

When all of the above is accomplished, the network will be ready for the full Profit Mastery marketing rollout. This can include:

- Promotional material sent via e-mail to the entire SBDC contact base
- Press releases to all media outlets in the state
- Newsletter articles made available to every Chamber of Commerce, Economic Development Centers and any other organizations that have business owners as members.
- Scheduled interviews with the State Director and/or Steve LeFever regarding the Profit Mastery initiative in your network.

Schedule live/facilitated classes

Begin to schedule live/facilitated classes with your Certified Facilitators. Use the 12 week marketing schedule laid out in the Administrative Guide to ensure adequate communication out to a prospective group which will generate the necessary sign-ups. Secure testimonials from each group and begin to incorporate those into your marketing materials locally which will further enhance the quality and reputation of the program within each centers local area. Continue to solicit your banking and other finance partners with information about the Profit Mastery program, asking for referrals of their clients who are in need of financial education.

Continue ongoing consistent public education

Mention Profit Mastery in every email, newsletter, quarterly report, annual report and any other outbound communication to your client base. Consistency is critical and every new program requires continuous communication for it to begin to become part of a network.