Business Smart is a business education series developed by the U.S. Small Business Administration and the National Association of Government Guarantee Lenders.
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To You, Our Valued Partner:

On behalf of the U.S. Small Business Administration (SBA) I would like to thank you for partnering with us to deploy the Business Smart Toolkit. This toolkit was developed jointly by SBA and the National Association of Government Guarantee Lenders (NAGGL) as a resource to equip you to join forces with SBA to educate and connect America’s aspiring entrepreneurs.

The toolkit is your step-by-step guide to delivering a successful workshop. The Business Smart workshop is a business education series that lays the groundwork for helping new and aspiring entrepreneurs launch a business idea that is credit ready. Your commitment to economic empowerment and inclusive entrepreneurship will help to ensure that the individuals in your community are made aware of the proper steps to building a successful business and where to go to receive additional business support. Since 1953, the SBA has worked to increase pathways toward economic empowerment by increasing access to capital and access to much needed business assistance for America’s small businesses—and with your support we will continue to serve more and reach more over the next 60 years.

This welcome packet is one part of the Business Smart Toolkit, which also includes an instructor manual, and workshop PowerPoint presentations. This Welcome Packet will walk you through the logistics of delivering a successful Business Smart workshop. This Welcome Packet includes:

- Workshop Planning Guide
- Host Organization Checklist
- Helpful Talking Points & Social Media recommendations
- Customizable Business Smart Workshop Flyer
- Sample Press Release

Over the years, I have met many individuals who have a desire to start a business but feel they lack the knowledge needed to run a business, are unsure of how to access capital and do not know where to go to get sound business advice. Overcoming these barriers is often the key to business success; and for many the SBA has been a key factor in this success.

We are excited to have you join us as we help cultivate the next generation of business owners. Together we can help empower communities across America through small business ownership!

Tameka Montgomery, Associate Administrator, Office of Entrepreneurial Development
STEP-BY-STEP GUIDANCE: PLAN YOUR WORKSHOP

PROPOSE THE IDEA
Propose the idea of the workshop to your organization’s leadership to secure buy-in and approval. You may also share the idea with potential attendees to make sure they are interested in the workshop topic.

DEFINE YOUR TARGET AUDIENCE
This would include the type of audience and how many you plan to be in attendance. This will determine advertising methods and budgeting.

CHOOSE YOUR LOCATION, DATE, AND TIME
With your target audience in mind, choose a place and date that will accommodate the workshop. Will you offer each module separately on a different day or will you host in all in one day? Business Smart is broken into three 60 to 90 minute modules, that can be delivered sequentially over 3 days or in its entirety as a half-day workshop.

DEFINE A GOAL
Decide on an attainable goal for the workshop. What do you want to see your attendees do or say after the workshop is complete? How many individuals would you like to attend?

DETERMINE DELIVERY APPROACH
Will you deliver all 3 modules or will you have other presenters? While the entire workshop can be delivered by a single entity, you may want to consider having your organization deliver Module 1, an then secure a local lender to deliver Module 2, and an SBA District office representative to deliver Module 3. To identify a lender willing to volunteer time to present the workshop Module 2, contact SBA’s partner, the National Association of Government Guaranteed Lenders (NAGGL), which is a trade association whose membership is made up of lenders located across the country. Send an email to info@naggl.org and ask for the names of some lenders in your town or city and the staff at NAGGL will help you to identify someone that fits the bill! Reach out to your local SBA District office to secure and SBA representative to deliver Module 3. Visit: https://www.sba.gov/tools/local-assistance/districtoffices and ask to speak with the District Director.

DETERMINE A BUDGET
Almost all events that require people to listen and participate necessitate (at least) light refreshments. Therefore, you may want to allocate some level of funding to deliver the workshop. Additional expenses may include printed copies of workshop materials, space and/or equipment budget may be just as important as defining your target audience. Set a budget that will be reasonable and used to guide your buying decisions.

IDENTIFY AND SECURE POSSIBLE PARTNERS
Determine whether you have the opportunity to partner with another organization to sponsor the workshop by providing space, food, or resources to cover printing of materials. Potential partners/sponsors could be lenders, city/government agencies, etc. If you do secure sponsors/partners, be sure to recognize them during the workshop and on workshop materials.
WORKSHOP HOST CHECKLIST

By using the Business Smart Toolkit, you have a tremendous opportunity to provide business training and assistance in your community. This checklist includes ways to invite and inform your members and/or constituents of the workshop. While these steps are not required, you can begin inviting and informing your business professionals by:

- **Create a workshop website.** This should give you individuals a good idea of what to expect from the workshop. Key items to be included on the website are listed below. The website should also include a registration page.

- **Share the workshop’s website.** Share the workshop on your organization’s website. Encourage others to visit the link for more information. This could also be the place where registration requirements are listed.
  
  Send an Email. Send your members or constituents an initial and follow-up email regarding the workshop.

- **Post Flyers.** Create and post attention grabbing flyers that articulate the purpose and audience for the workshop. A flyer template is included in this packet for your convenience.

- **Use Social Media.** Broadcast your event over various social mediums including Facebook and Twitter. Share business tips and create hashtags (#) to develop a network of communication.

- **Encourage people to sign up and register.** Announce your methods of registration this can include an online registration link and/or phone number/email to register.

- **Invite others.** Research and find local business assistance resources. There is likely an SBA district office in your community or other SBA affiliated resources in your community that may be invited to participate and help in the workshop. Visit www.sba.gov/tools/local-assistance. Also, reach out to local entrepreneurs to see if they would like to participate as guest entrepreneurs.
Subject: Business Smart Workshop

Dear Members,

We are pleased to present a workshop developed specifically for the education and growth of current and aspiring entrepreneurs. The Business Smart Workshop will be presented on [INSERT TIME AND DATE].

The goal of the workshop is to provide current and aspiring entrepreneurs with business knowledge and connect them to local support and resources. The workshop is free and was developed by the U.S. Small Business Administration and the National Association of Government Guaranteed Lenders.

The workshop will focus on:
1. Basics of business startup
2. Essentials of becoming credit-ready
3. How and where to find additional small business support and educational resources

We are excited about this opportunity and hope you will take advantage of the knowledge being provided. This is an educational experience you don’t want to miss.

For more information contact me, [NAME] directly at [INSERT EMAIL OR PHONE NUMBER] or visit our website [INSERT WEBSITE LINK].
SAMPLE SOCIAL MEDIA TEXT

Share a message on Facebook and Twitter announcing the presentation of the workshop. Encourage members to follow your organization and like your page. Get your followers involved in the conversation about business and the workshop by advertising and posting business facts.

Promote the workshop by creating the following hashtag:
#BusinessSmart  @[Insert your organization here] #BusinessSmart

SAMPLE FACEBOOK ANNOUNCEMENT

ADVERTISE

• [Organization name] is proud to present the Business Smart Workshop on [insert date]. This workshop will provide easy to understand business concepts, tips, and resources.
• Come out on [insert date] and experience an educational workshop for current and aspiring entrepreneurs. For any further information visit [workshop website]
• We’re proud to provide comprehensive business & financial info to make current & aspiring entrepreneurs #BusinessSmart
• We’re excited to present the #BusinessSmart Workshop! Visit our website for details [insert link]

FUN FACTS

• As an entrepreneur or small business owner, you have options and resources. Local assistance is easy to find, visit https://www.sba.gov/tools/local-assistance for direct guidance.
• More than 250,000 military personnel transition into the civilian life annually, and fortunately there is funding and support dedicated to those entering entrepreneurship. The following website helps to navigate and educate veterans on their journey https://www.sba.gov/offices/headquarters/ovbd.
• Sample Twitter Announcement (“Twitter only allows for 140 characters; use them wisely”)
• Did you know women start firms with less capital than men and rely on the startup capital in different ways? #BusinessSmart
• Did you know self-employed doesn’t always mean sole proprietor? #Entrepreneur #BusinessSmart
[ORGANIZATION NAME]

is Helping Entrepreneurs Become Business Smart

Release Date: [MM/DD/YYYY]

[CITY, STATE] – [ORGANIZATION NAME] is offering the [COMMUNITY NAME] community with a free, half-day business education workshop called Business Smart. The workshop will lay the groundwork for helping new and aspiring entrepreneurs launch a business idea and prepare “Small businesses are the economic backbone of our society and we need more people starting successful businesses. Government can’t help businesses alone, we need organization’s like [ORGANIZATION NAME] joining forces with SBA to help American’s achieve their dreams of business ownership” said Tameka Montgomery, Associate Administrator for the U.S. Small Business Administration, Office of Entrepreneurial Development.

Participants will learn the basics of business startup, the essentials of becoming credit-ready and how and where to find additional small business support and education resources in their local community.

“[ORGANIZATION NAME] is committed to making our community strong economically. We are hosting a Business Smart workshop because we are committed to proactively educating and empowering [DEMOGRAPHIC INFORMATION] about how to turn their idea into reality” said [ORGANIZATION REPRESENTATIVE].

The Business Smart Workshop is scheduled for [DATE & TIME] at [LOCATION]. The workshop is free, but pre-registration is required. Please register early as seating is limited. Contact [NAME] to register.

Business Smart is a business education series aimed at increasing access to all communities about the steps needed to start and grow a successful business. SBA developed the series in conjunction with the National Association for Government Guarantee Lenders (NAGGL). For additional information about

Business Smart visit: www.sba.gov/businesssmart
SAMPLE FLYER

BUSINESS SMART WORKSHOP

Learn what it takes to have a successful start-up

In this workshop you will:
- Gain a basic understanding of the key steps to getting your business off the ground
- Learn about various financing options and what banks look for when lending money
- Learn about the local resources available to assist you in starting and growing a small business

Saturday
03/12/2013
8AM - 3PM
Seraton Hotel city, New York

FREE
Breakfast + Lunch

For more information
Call:555-555-5555
Sponsored by: William Johnson
FACTS ABOUT RESOURCES OFFERED

- SBA has District Offices and resources (such as Small Business Development Centers, SCORE, and Women’s Business Centers) in every state that offer free counseling, mentorship and advice
- You can find the resources closest to you by entering your zip code at sba.gov/local-assistance
- Free, online, on-demand business courses are available at sba.gov/learning

FACTS ABOUT AMERICA’S BUSINESS WORLD

- Nationally, there are approximately 28 million small businesses
- Over three-quarters of small businesses have no employees
- Small businesses:
  - Make up 99% of U.S. employer firms
  - Create 63% of the net new private sector jobs
  - Employ 48% of private sector workforce
  - Make up 98% of the firms exporting goods

TIPS

HERE ARE A FEW TIPS FOR HOW TO RUN THE WORKSHOP SUCCESSFULLY:

- Try starting with a few icebreakers to get your audience relaxed, comfortable, and involved.
- Tell an inspirational story that sets the mood of the workshop (stories can include that of successful entrepreneurs).
- If the workshop extends into lunch, provide lunch or encourage attendees to bring or buy lunch. Many people become sluggish after lunch, so anticipate a different mood or maybe a less attentive audience.
- Provide light refreshments such as coffee, water, and fruit.
- Allow time for questions and clarifications. Leave enough time for those who learn at a different pace.
- Ensure your body language and tone of voice is positive and engaging
- Practice going through the workshop before actually presenting the workshop
- Silence isn’t always an indicator of nothing happening but rather that of people thinking and analyzing. So don’t be quick to rush your group.
- Have Fun! Remember you are informing the next generation of entrepreneurs, so enjoy the thrill of teaching them.
RESOURCES

SBA RESOURCES NEAR YOU
https://www.sba.gov/tools/local-assistance

NAGGL RESOURCE
Info@naggl.org for a lender volunteer near you

WOMEN
www.awbc.org

VETERANS
https://www.sba.gov/offices/headquarters/vbd/resources/4930

OTHER RESOURCES
Business Smart Video (click here)
www.americassbdc.org
www.score.org
www.business.usa.gov
www.usa.gov
www.irs.gov
www.mbdagov
www.ustpo.gov/learning-and-resources/inventors-entrepreneurs-resources

SBA LEARNING CENTER
www.sba.gov/learning
The SBA Learning Center provides self-paced training courses, videos, worksheets, and checklists designed by business development specialists and educators to help entrepreneurs learn about business ownership. Courses provide introductory and intermediate entrepreneurship education.
TALKING POINTS

Background: Developed in 2015, the Business Smart Toolkit aims to provide the basic and essential knowledge of business to entrepreneurs and small businesses. The Toolkit offers an easy-to-use program that teaches business planning, credit and loan literacy, and provides local support and resources.

Key Message: There are ample resources available to entrepreneurs and small businesses. The Business Smart Toolkit is a train-the-trainer resource for community organizations, faith-based congregations, non-profits, and whoever else would like to assist in facilitating workshops in business basics.

Supporting Messages:

There are many resources at the disposal of small business owners. These resources include Small Business Development Centers (SBDCs), SCORE, and Women’s Business Centers (WBCs).

• There are more than 1,000 SBDCs each hosted by a university or state economic development agency
• Hundreds of SCORE chapters are located right in your community that house expert volunteer mentors who coach small business owners
• WBCs offer a variety of assistance, classes and training activities for women across America

BUSINESS SMART CURRICULUM:

• Understand the basics of starting a business
• Create a business plan
• Determine costs to start a business
• Obtain Business license and permits
• Acquire Capital
• Apply for loans
• Credit Literacy
• Tax Information
• National and local resources available

HELPFUL TIP TO REMEMBER

• Take the business process one step at a time. The Business Smart Toolkit incorporates a great deal of information, and it’s ok if all of it isn’t absorbed at once.

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