ASSOCIATION OF WOMEN'S BUSINESS CENTERS CONFERENCE SEPTEMBER 2024

#### CHATHAM UNIVERSITY

CENTER FOR WOMEN'S ENTREPRENEURSHIP

Women's Business Center

# DESIGNING A COMPREHENSIVE BUSINESS COUNSELING EXPERIENCE TO MEET YOUR GOALS

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> RACHEL WEBBER BUSINESS ADVISOR

WWW.CHATHAM.EDU/CWE





### **CWE STAFF:**

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SBA U.S. Small Business Administration

# **Celebrating 19 Years Supporting Women-Owned Businesses!**



### CHATHAM UNIVERSITY CENTER FOR WOMEN'S ENTREPRENEURSHIP

Women's Business Center

## BA U.S. Small Business Administration

### **General Business Counseling**

- 8 total counselors
- Appointments offered Monday through Saturday – various times.
- Start-up assistance, business planning, operations, growth, basic financials, general marketing, etc.
- Each counselor offers 8-16 hours of counseling per month.

### **Technical Assistance**

- 12 total counselors
- Appointments offered Monday through Saturday – counselors try to keep same monthly hours.
- Funding Clinic, digital marketing, diversity certifications, food industry, child care, HR, legal, accounting.
- Each counselor offers 3-5 hours per month.

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Free Business Counseling and Technical Assistance For-Profit Businesses

L. Dusiness Management
🚠 Business Management
Digital Marketing & Social Media
💼 Accounting & Tax
🛃 Legal
🐸 Human Resources
🛱 Branding & Marketing
Diversity Certifications
🔝 Funding Clinic
Business Counseling for Child Care
Marketing Counseling for the Food Industry



### October 2022 – September 2023 Stats

j j	Se	6
SBA Loans	Number of Capital	Total Loans
\$3.4MM	Infusion	\$4.7MM
	74	
(A) 888		ĝÐ
1,654		186
Small Business Owne	rs Total	Training Hours
Trained		
<u>्र्यू</u>	ů3	300
503	1,087	944
Small Business	Total Counseling	Job Supported
<b>Owners Counseled</b>	Hours	
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91.8%	49.8%	31
91.8% Identified as	49.8% Identified as	<b>31</b> New Business

Program Topics	Counselling Topics
Voice of Business Speaker Series	Business Management
Breaking Down the Business Plan	Digital Marketing & Social Media
Build Your Business	Accounting
Concept to Launch	Human Resources
First Leap	Legal
The Business of Child Care	Funding Clinic
Business Planning & Capital Readiness	Diversity Certifications
Growth Webinars & Workshops	Branding & Marketing
Building Blocks for Business Capital	Business Counseling for the Child Care
Back to Business: Recovery & Growth for the Food Industry	Marketing Counseling for the Food Industry



### **Counseling By The Numbers**

- 20 counselors, including 3 full-time CWE staff, 5 additional general counselors, and 12 technical assistance providers.
- From April 2016 to September 2023, the Center provided 6,013 hours of business counseling to 3,106 clients, which directly contributed to 278 new businesses and \$24.4M in raised capital through a combination of equity, SBA loans, and private loans.
- **Crisis Response**: At the height of the pandemic, CWE served entrepreneurs with over 1,000 counseling sessions, resulting in \$7M in capital infusions across 163 individual transactions.
- Uplifting Underserved Entrepreneurs: CWE has steadily increased the number of Minority-Owned businesses served by 10% annually. In 2023, 1,011 total Minority businesses benefitted from CWE programming.
- Supporting Local Economy: CWE has recorded 152 total business starts from 2020 to early 2023, and 248 new jobs created from 2020 to 2023.

### **Counseling Logistics**

- CWE Director, Business Advisor and Community & Membership Engagement Coordinator all offer business counseling.
- 17 counselors are contracted each fiscal year at a rate of \$90 per hour.
- Each counselor is required to fill out a survey form after each session to help us capture reporting metrics.
- A few counselors volunteer their time as a Center sponsor or advisory board member.
- No cancellation fees or counseling fees yet.
- Neoserra software is used to capture new client form, which then leads the client to Acuity Scheduling system.
- Counselors invoice CWE monthly.

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#### **CWE Counseling Record**

This is the counselor record for all the CWE counseling sessions.

\* 1. Please answer the following questions about the client you consulted with:

First Name	
Last Name	
Email Address	

\* 2. Is the client currently in business? (REQUIRED, Have the client made a sale?)

0	If Yes.	Please	answer	question	3	& 4	ŧ
~ 2			anonor	queenen	~	~	۰.

O No

3. Please answer the following questions about the client's business:

Month and Year the business	
started (When was the very	
first sale?)	

Total number of Full and Part

time employees (Including the client)

4. If the client secured financing, please indicate the type/dollar amount:

SBA Loan	
Non-SBA Loan	
Equity Capital (Self Fund)	

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### **U.S. Small Business** Administration

### **Meet CWE Counselors**

- Business owners in the travel, tech, HR, ٠ marketing and medical industries.
- Former SBDC and SCORE counselors. •
- Accountants •
- Lawyers ٠
- Former Bank Presidents •
- **High-Level Executives** ٠
- Former CWF clients! •

Especially when scheduling for a general counseling appointment, clients are encouraged to read the bios of counselors to see who may be a good fit: https://www.chatham.edu/cwe/counseling/c ounselors.cfm





### **Counseling Scheduling Policies**



CWE clients receive 2 appointments every 3 months. Clients can schedule two general, two technical assistance or 1 of each.

Counseling is offered by phone, Zoom and in person.

Clients must fill out new client form before making an appointment.

Email and/or text reminders are automatically sent at 48 hours, 24 hours, and 4 hours Frequent no-shows and last-minute cancellations cannot continue to schedule online.







### Free Business Counseling and Technical Assistance For-Profit Businesses

Face-to-face, online, and phone business counseling sessions are available for aspiring and existing business owners and students (regardless of gender) by appointment. Technical assistance is also available in the areas of management, digital marketing, accounting, exporting, legal, HR, branding and marketing, and diversity certifications.

### **CWE Scheduling Policy**

Effective September 1, 2023, clients can schedule two counseling appointments within a three-month period, which is provided at no cost. Any further client services with our Technical Assistance counselors or other providers are contracted by the client and are the financial responsibility of the client, not the Center.

#### RESCHEDULING AND CANCELLATION POLICY:

Once you make your appointment you will receive an email confirmation, a text reminder and three email reminders at 48 hours, 24 hours, and 4 hours before your appointment at which time you will have the opportunity if needed to cancel or reschedule.

Late Cancellations and No-Shows will be restricted from making new appointments until they have contacted the Center.

#### COMPLETE A COUNSELING REQUEST FORM

To schedule an appointment please click on the request counseling button below and fill out the New Client Sign-Up form. Important: Once the new client sign-up form has been completed and submitted, another webpage will open up with links to schedule your business counseling or technical assistance appointment. Please do not close your browser window until you have clicked on the link to schedule your appointment.

### REQUEST COUNSELING

### CHATHAM UNIVERSITY CENTER FOR WOMEN'S ENTREPRENEURSHIP

Women's Business Center



### **Counseling Scheduling Policies**

Once you make your appointment you will receive an email confirmation, a text reminder and three email reminders at 48 hours, 24 hours, and 4 hours before your appointment at which time you will have the opportunity if needed to cancel or reschedule.

Late Cancellations and No-Shows will be restricted from making new appointments until they have contacted the Center.

Schedule your one-on-one general business counseling sessions here . Schedule your one-on-one technical assistance counseling sessions here .

Zoom: Technical Assistance Accounting Counseling with Mary Jo Lincoln 1 hour	воок
These technical assistance accounting counseling sessions will be offered on the third Tuesday of the month from 11 a.m. to 1 p.m. and the third Thursday of the month from 12 to 2 p.m. All sessions will be held via Zoom.	
Telephone: Funding Clinic with Melanie Ansell. 1 hour	воок
Assistance with new business loan applications (gathering information, preparing financials, reviewing terms), and examining re-financing options and repayments. Melanie Ansell is past bank president, current business owner, and a tea	
SHOW ALL	
Zoom: Marketing and Branding for the Food, Retail & B2C Businesses with Rachel Graper 1 hour	воок
These business counseling sessions are designed to support food, retail and B2C businesses in marketing and branding. Entrepreneurs can discuss their specific needs relating to retail, wholesale and consumer sales channels, including pr	
SHOWALL	

#### CHATHAM UNIVERSITY CENTER FOR WOMEN'S ENTREPRENEURSHIP

Women's Business Center

### **Counseling Scheduling Policies**



#### 1. Mondays

Telephone: General Business Counseling with Talpha Harris 1 hour	воок
These sessions are held every Monday from 9:00am-11:00am by phone. Counselor: Talpha Harris	
Zoom: General Business Counseling Mondays with Lillian Rafson 1 hour	воок
CWE Zoom Counseling Mondays: Lillian Rafson. Description: These Zoom sessions are held Monday evenings from 5:00-7:00 PM.	
Telephone: General Business Counseling Mondays with Anne Flynn Schlicht 1 hour	воок
CWE Telephone Only Counseling Mondays: Anne Flynn Schlicht. Description: These phone sessions are held on Monday between 1:00-2:00PM	

#### 2. Tuesdays

Zoom: General Business Counseling Tuesdays with Lisa Diaz	воок
1 hour	
These general business counseling sessions are held every Tuesday with Lisa Diaz via Zoom.	
Times will vary.	

### **Appointment Scheduled**

#### for Meena Hill

What Zoom: General Business Counseling with Rachel Webber (Zoom: General Business Counseling with Rachel Webber)

When Wednesday, August 14, 2024 2:00pm (1 hour)

#### Where

ZOOM. The Zoom link is copied here. <u>Click to join meeting</u>: <u>https://app.acuityscheduling.com/schedule.php?</u> owner=13175976&action=zoom&uniqueID=4fd1857eb7d1c867c5298770f02482b8&ownerID=13175976

#### Rescheduling and Cancellation Policy:

CWE provides business counseling and technical assistance counseling at no fee to our clients. Once you make your appointment you will receive an email confirmation, a text reminder and three email reminders at 48 hours, 24 hours, and 4 hours before your appointment at which time you will have the opportunity if needed to cancel or reschedule.

Late cancellations and No-Shows will be restricted from making new appointments until they have contacted the Center. Questions please email <u>womens-</u> entrepreneurship@chatham.edu or call 412-365-1253.

Thank you, your appointment has been successfully scheduled.

This appointment will be held via Zoom. Link here: <u>Click to join meeting</u>: <u>https://app.acuityscheduling.com/schedule.php?</u> <u>owner=13175976&action=zoom&uniqueID=4fd1857eb7d1c867c5298770f02482b8&ownerID=13175976</u>. Questions? Please call 412-365-1253 with any questions or if you need any additional assistance.



If so, please provide your business name, industry, and number of employees (not including yourself):

Please provide the month and year your business started, if applicable:

What would you like to discuss in your session?

Please provide any other information you would like your counselor to have about you or your business/concept:

Address:

City:

State:

Zip:

Phone number:

#### CHATHAM UNIVERSITY

### CENTER FOR WOMEN'S ENTREPRENEURSHIP

Women's Business Center



Monday, Jul 29	Tuesday, Jul 30	Wednesday, Jul 31	Thursday, Aug 1	Friday, Aug 2
Diamond Moore: Telephone: Funding Clinic with Melanie	Taylor Christmas: Zoom: Diversity Certification Technical	111,	Kim Flurry: Zoom: Diversity Certification Technical Assistance	
Ansell. 1:00PM-2:00PM	Assistance with Marian Neilson 1:00PM-2:30PM	///.	with Marian Neilson 1:00PM-2:30PM	
with Telephone: Funding Clinic with Melanie Ansell	with Zoom: Diversity Certification Technical Assistance with Marian		with Zoom: Diversity Certification Technical Assistance with Marian	
Vashon Bryant: Telephone: Funding Clinic with Melanie Ansell.	Neilson	K. Virginia Christman: Zoom: General Business Counseling with	Neilson	-
2:00PM-3:00PM with Telephone: Funding Clinic with Melanie Ansell		Rachel Webber 2:00PM-3:00PM		
		with Zoom: General Business Counseling with Rachel Webber		
		111,		
	Tanya Kindel: Zoom: Digital Services Clinic: User Experience	///		
	and Web Design Technical Assistance with Auldyn Matthews- McGee			
	4:00PM-5:00PM with Zoom: User Experience and Web Design Technical Assistance			
Janet Bynum: Zoom: General Business Counseling Mondays				
with Lillian Rafson 5:00PM-6:00PM				
with Zoom: General Business Counseling with Lillian Rafson				
Safiyyah Scott: Zoom: General Business Counseling Mondays with Lillian Rafson				
6:00PM-7:00PM			-///	
with Zoom: General Business Counseling with Lillian Rafson				
		111.	111.	



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#### Phone

Telephone: Accounting Technical Assistance with Judith Herron.

Telephone: Friday General Business Counseling with Wendy Mascio

Telephone: General Business Counseling Mondays with Anne Flynn Schlicht

Telephone: General Marketing Technical Assistance with Jane Ann Regan

Telephone: Legal Technical Assistance with Beth Slagle

Telephone: Monday General Business Counseling with Talpha Harris

Telephone: Thursday General Business Counseling with Wendy Mascio

### **Calendar Settings**

#### CALENDAR NAME

#### Telephone: Accounting Technical Assistance with Judith Herr

#### DESCRIPTION

Add description...

Clients will see this on the calendar list when scheduling.

#### LOCATION

#### Phone

The location will be added to calendar invites, the scheduling page, and any emails with %location%.

IMAGE

#### ADD IMAGE

Images must be 1.5 MB or smaller. Clients see the image when you have multiple calendars on your page.



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### U.S. Small Business Administration

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#### Appointment Types

Looks like you have quite a few types and categories. You can clean up the appearance of your client's scheduling page by collapsing categories. Try it out >>

#### New Type of Service New Type of Group Class

Categories are sorted alphabetically. Click and drag appointment types to reorder or move them to a new category. Learn more »

1. Mondays Direct Scheduling Link 🗸

Telephone: General Business Counseling with Talpha Harris (1 hour)

Zoom: General Business Counseling Mondays with Lillian Rafson (1 hour)

Telephone: General Business Counseling Mondays with Anne Flynn Schlicht (1 hour)

#### 2. Tuesdays Direct Scheduling Link v

Zoom: General Business Counseling Tuesdays with Lisa Diaz (1 hour)

Zoom: General Business Counseling with Lillian Rafson (Tuesdays) (1 hour)

Zoom: Business Counseling and Membership with Michelle Price (1 hour)

#### 3. Wednesdays Direct Scheduling Link v

Zoom: General Business Counseling with Rachel Webber (1 hour)

Zoom: General Business Counseling with Dione Cahillane (1 hour)

#### 4. Thursdays Direct Scheduling Link v

Telephone: General Business Counseling with Talpha Harris (1 hour)

Telephone: General Business Counseling with Wendy Mascio (1 hour)

Zoom: General Business Counseling with Cidalia Cornelio (1 hour)

#### EMAIL SUBJECT

New Appointment: %type% (%first% %last%) on %time%

#### Example

New Appointment: Telephone: General Business Counseling Mondays with Anne Flynn Schlic

#### 

#### Appointment Scheduled

for %first% %last%

What %type% (%calendar%)

When %time% (%duration%)

Phone: The counselor will be calling you at the phone number provided.

#### Rescheduling and Cancellation Policy:

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Late cancellations and No-Shows will be restricted from making new appointments until they have contacted the Center. Questions please email <u>womens-</u> <u>entrepreneurship@chatham.edu</u> or call 412-365-1253.

- CWE has contracted with local government, community development corporations, and community development financial institutions to provide counseling for loan applications and financing.
- These clients are allotted 5-10 hours with their assigned counselor, and CWE invoices for counselor hours as well as overall staff time.
- Community counseling has greatly improved metrics around unique clients and capital infusion.
- Clients who may be newer to business or collecting financials for a loan application have more hours to learn and grow their business.
- CWE receives referrals from SBA District office, former clients, local CDCs, lenders and other partners.



Urban Redevelopment Authority of Pittsburgh



**U.S. Small Business** 

Administration



### CENTER FOR WOMEN'S ENTREPRENEURSHIP Women's Business Center

U.S. Small Business Administration

### **Training Programs**

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### Digital Service Training Series (Hybrid) Websites That Work Turning Visits Into Value

This five-part training series is designed for small business owners interested in understanding the essence of creating effective websites. The series not only covers the foundational aspects of website strategy but also dives deep into advanced strategies that make websites stand out.

> Date: October 21 to November 8 Time: 12:00 PM - 2:00 PM Location: Chatham Eastside - 6585 Penn Ave, Pittsburgh PA 15206 Fee: \$65 General Admission. \$25 CWE Members





**REGISTER NOV** 

### CHATHAM UNIVERSITY CENTER FOR WOMEN'S ENTREPRENEURSHIP

SBA

# CONCEPT TO LAUNCH

Instructor: Lilian Rafson, CEO and founder of Pack Up + Go

Date: September 25, 2024, to October 30, 2024 Time: 6:00 PM - 8:00 PM Location: Online - Zoom Fee: \$65 General Admission. \$20 to CWE Members

### **Classes Focus On:**

Developing the business concept
Identifying target customers and markets

Marketing strategies

Foundational operations of your business

Basic financials
Legal business entities
Developing and delivering your "pitch"

U.S. Small Business Administration

### **CWE Open House**





### **Counseling Wins**

Counseling becomes a feeder for training programs topics and recruitment - many training programs are created from repeated requests through counseling.

Increase engagement with the Center – counseling is a great way for entrepreneurs to first become acquainted with CWE and then join membership, training programs, etc.

Counselors gather milestone data (New Business Starts, Jobs, Capital Infusion) and assist in communicating success stories from clients.

Business Directory - clients can engage with other entrepreneurs and create partnerships through our business directory.





### **Counseling Success Stories**



### Tess Kenney, Owner, HandinHand Counseling Services "The program was a very transformative experience. It helped me to establish clear goals for the business now and for the future. The program helped me to understand better how companies are financed and identify changes that can be implemented for more growth, specifically around securing a line of credit and tightening up bookkeeping. The programs stressed, "Cash is King" and challenged us to find ways to acquire cash and to seek opportunities for funding for our businesses."



### **Counseling Success Stories**



### Ilana Schwarcz, Owner, Family Spinner

"The staff and mentors at CWE made all the difference to me. Seeing other women succeed, encourage and support others was very inspiring. The program facilitator and mentors' advice and help was invaluable. After the program, we hired a contractor for website development, a contractor for Instagram creation and ongoing support, and a contractor for sales help. We were also blessed with a \$10,000 Comcast Small Business Grant, which I only applied for due to the encouragement and help of my Roadmap Mentors."



### **Counseling Success Stories**

Christine Iksic, Owner, 3 Rivers Outdoor Company "The program has helped my business complete a focused analysis of different core areas and led us to make needed improvements, particularly within the financial review components. 3 Rivers Outdoor Company received an SBA (Small Business Administration) Economic Injury Disaster Loan, just before the application window closed. We wouldn't have secured that funding without the help of the program. "







### **Lessons Learned & Improvements**

- Scheduling policy and No Shows no shows have cut down significantly after updating our website introductory text and reminder emails and texts.
- Zoom links are auto populated for each client and sent in multiple reminder emails to reduce confusion.
- Brief client introduction calls to understand their preferred work environment.
- CWE is currently looking into certification for contracted counselors and staff to offer continuing education.
- Screening to ensure technical assistance sessions include content that general business counselors can't answer.





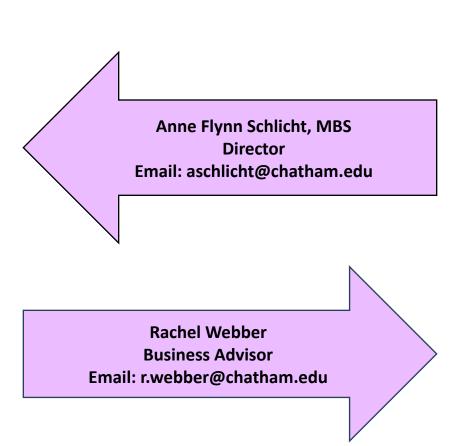
### **Key Takeaways**

- To improve reporting metrics, recruit clients through partnerships with local funders, community groups and government organizations.
- Improve counselor engagement with referrals, training opportunities, and in-person events.
- Train counselors on what metrics you need for SBA reporting and use them to collect that data.
- Screen clients as thoroughly as possible to make the most out of their counseling sessions.



# Thank you!







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