North Coast SCORE 450 2016 Fall Workshop Schedule and Descriptions

Saturday, September 10, 2016 - 9:00 am – 12:00 pm Workshop Title: Building Successful Businesses

Workshop Presenter: Richard Adler

Presenter's Current Affiliation and Brief Bio:

Richard Adler currently serves as the Chairman of North Coast SCORE and is an active SCORE Mentor to small businesses. His specialties include: restaurant operations, franchising, commercial real estate, small business development and construction. Richard built an Applebee's franchise from 1 restaurant to 22 restaurants with 2,000 employees and had the first franchise of the Panera Bread Bakery Café in California, building the group to five locations with four more in the works when it was sold.

Workshop overview:

This workshop is an overview of the basics of starting a business, what it takes to be an entrepreneur, including creating a business plan, creating a marketing plan, understanding financial statements and funding. These topics are covered in detail in subsequent workshops, but this workshop provides an overview so that the attendees can decide which topics they want to explore in more detail.

At the end of this workshop, participants should be able to:

- 1. Know if they have what it takes to be in business as opposed to working for a company.
- 2. Have a clear idea of what the minimum needed is to start a business.
- 3. Know how to build a team to have the right foundation to start a business

Saturday, September 17, 2016 - 9:00 am – 12:00 pm Workshop Title: Funding Your Business

Workshop Presenter Name: Michael Begovich

Presenter's Current Affiliation and Brief Bio:

Michael is a Score Mentor and Retired Commercial Banker focused on commercial credit risk management.

Workshop overview: We examine and explain the rationale used by regulated lenders (banks primarily) and sophisticated investors in formulating credit decisions. We discuss the difference between funding existing business vs. proposed. And we explain risk evaluation vs. reward, i.e. the riskier the proposal the more reward is required in exchange.

At the end of this workshop, participants should be able to:

- 1. Understand what is a viable funding request
- 2. Know what lenders/investors consider are viable lending requests.
- 3. Understand why start-ups are difficult to get funded and why existing businesses are not.

September 24, 2016 – 9:00 am – 12:00 pm Workshop Title: Financial Statements: The Backbone for Business

Workshop Presenter: Phil Husby

Presenter's Current Affiliation and Brief Bio:

Phil Husby has over 40 years of professional experience providing financing, accounting and tax services to technology companies. He has held Chief Financial Officer positions at many public and private companies, and has extensive international business experience. Mr. Husby is a Certified Public Accountant, with a BA in Accounting and MBA in finance and international business.

Workshop overview:

Learn how to assess financial risks and rewards, true start-up costs, ongoing operating expenses. Set benchmarks for tracking progress and the organization of all your financial information, including the Profit & Loss Statement, the Balance Sheet, and the Cash Flow statement.

The workshop will explain, in non-technical language, how to create and maintain these financial documents. It will show what the most important elements are and how to use them to keep track of your business performance. You will learn how a funding institution may look at these documents to make investing or loan decisions.

- 1. Create and maintain key financial statements for your business
- 2. Understand what is needed to track your business performance
- 3. Understand what financial institutions will be looking for when making investing or loan decisions.



Photo of Roy Johnson for use with 9/28 and 10/22 workshops

Wednesday, September 28, 2016 – 6:00 – 8:00 pm Workshop Title: Choosing Your Form of Business

Workshop Presenter Name: Roy Johnston

Presenter's Current Affiliation and Brief Bio:

Roy Johnston is in his 20th year of business law, real estate law and estate planning. He advises businesses from startup through stock distribution to investors. Roy is active in the business law sections of the California Bar Association and the Sonoma County Bar Association, and has a Bachelor of Science degree in Business Administration from the University of Wyoming. Most importantly, Roy is a small business owner who puts into practice the principles he teaches.

Workshop Overview: What form of business is best for you: sole proprietorship, partnership, limited partnership, limited liability corporation, S corporation or regular corporation? Should you form your business in another state? Should you use legalzoom.com or some other online service to form your business? In this workshop, you will learn the basic differences of the different forms of business, and will work through a checklist during the workshop to identify which type is best for you. You will also learn when forming your business through an online service is appropriate for you. Join business attorney Roy Johnston as he helps guide you through the maze of choices.

- 1. Have an understanding of the different basic forms of business.
- 2. Know which form of business is best for you.
- 3. Decide if you should form your own business, or use an attorney

Saturday, October 8, 2016 – 9:00 am – 12:00 pm Workshop Title: Creating Professional Emails that Rock, Branding & Growing Your List

Workshop Presenter Name: LynAnn King, KingSings PR, Marketing Strategist and Publicist

Presenter's Current Affiliation and Brief Bio:

LynAnn King partners with successful small businesses and empowers entrepreneurs to deliver compelling marketing communications, special events promotions and media campaigns. She brings her visionary leadership in rolling out creative marketing campaigns that create visibility and media coverage. Her clients partner with KingSings PR as their marketing and publicity expert. www.KingSingsPR.com Authorized Local Expert (ALE) with Constant Contact

Workshop overview:

Creating Professional Emails That Rock!

Covers email marketing strategies, tactics, tools for creating graphics and tips to up your branded visibility, position you as professional. Staying visible to your customers and prospects has become even more important when it comes to brand recognition and loyalty. When you have the right marketing tools, it can be fun and efficient.

Join us for an insightful marketing seminar and go home with clear "next steps" to accelerate your business and generate more revenue and success, with email marketing combined.

This workshop is designed to give small businesses and nonprofit organizations ideas for growing their customer, prospect, or member network by using email and social media marketing.

You'll learn what it means to run effective email marketing campaign and what tools you can use to measure the success of your efforts without spending lots of time or money.

Participants will leave with ideas for timing their messages, how to write a winning subject line, and what kinds of offers or content they want to try and how best to approach their next outreach project.

We will discuss:

- 1. What type of content to use in your campaigns
- 2. How to get more people to stop and read your messages
- 3. How to make your emails ROCK with professional branding
- 4. How to get more action or reaction to your messages and offers
- 5. Why using images on social media channels creates higher engagement and
- 6. How your content can be mobile-friendly

Photos of Jeffrey Schmidt and Diana Morgan or 10/12 Workshop





Photos of Jeffrey Schmidt and Diana Morgan or 10/12 Workshop

Wednesday, October 12, 2016 – 6:00 – 9:00 pm Workshop Title: Social Media Marketing

Workshop Presenter Name: Jeffrey Schmidt and Diana Concoff Morgan

Presenter's Current Affiliation and Brief Bio:

Jeffrey Schmidt owns DeepSky Marketing, which serves the needs of sustainable companies and Agency for Earth, a social marketing firm. He is an expert in branding and messaging.

Diana Morgan is the CEO of Whole Heart Marketing, a Social Marketing company and is a Speaker, Trainer, Successful Entrepreneur, Certified Coach and Co-Author of the book, "Business Success With Ease."

Workshop overview:

How will **Social Media** help my business? Where do I start?

Have you been wondering if Social Media will help your business? Not sure which platforms will work for you? Don't know where to start or if you are doing it right? This seminar will give you the latest Social Media strategies for your business.

Facebook — Is Facebook right for you? For many businesses the answer is YES! Find out what works on Facebook and what doesn't. Discover how to grow your business by targeting the demographic and geographic areas that are right for you.

LinkedIn — If you have a business that sells products or services to other businesses you need to consider LinkedIn.

Twitter — Can you explain how you can help people? If so having a Twitter account will help you interact with people who care about your message.

Google+, YouTube, Pinterest, Instagram — Explore the latest Social Media tools and strategies that may be relevant to growing your business.

Get answers to your social media questions! Determine which tools and strategies might be right for your business and how can you best make use of them. (186 words)

- 1. Choose the best mix of Social Media platforms for your business
- 2. Understand how to work several top Social Media (SM) platforms
- 3. Have an understanding of how you can use and target Facebook ads and promoted posts to grow your business
- 4. Know when to be "social" and when and how to sell on Social Media
- 5. Be able to write copy to engage, nurture and sell for your business
- 6. Understand how Social Media fits into a broader marketing plan

Saturday, October 15, 2016 – 9:00 am – 12:00 pm Workshop Title: Simplifying Human Resources For Survival and Success

Workshop Presenter Name: Deborah A. Muchmore

Presenter's Current Affiliation and Brief Bio:

Deborah Muchmore has 25 years of operational and human resource management experience in the private and public sectors. Today, as a human resources advisor and consultant, she works mostly with public agencies. Deborah and her husband, Michael, in addition to raising a family have owned several businesses over their 22 years together including food service, catering, photography, and real estate.

Workshop overview:

If the term Human Resources makes your eyes roll back in your head, this course is for you. The field of human resources is broad and diverse and is governed by many laws and regulations. Knowing basic strategies for human resource management, what laws actually affect you, when to reach out for professional advice, and where to find helpful resources can mean the difference between tearing your hair out and having a workforce that propels your business forward.

This course will provide you with the tools that you need to have a basic understanding of what human resources means to your business, how to meet basic human resource requirements, when to call in a consultant or obtain legal advice, and how to create an environment and culture in your business that promotes respectful communication and productive employees.

- 1. Understand the basic tools and documents every business must have for effective and legal human resource management.
- 2. Identify core functional areas of Human Resource Management and where to find quality resources for gaining further information.
- 3. Know the importance of communicating values and expectations and establishing standards and operating procedures and the basics of how to utilize them to create a productive and respectful culture.
- 4. Determine when to reach out for professional or legal assistance as well as a list of a variety of local resources participants may contact.

Saturday, October 22, 2016 – 9:00 am – 12:00 pm Workshop Title: Writing an Effective Business Plan

Workshop Presenter Name: Roy Johnston

Presenter's Current Affiliation and Brief Bio:

Roy Johnston is in his 20th year of business law, real estate law and estate planning. He advises businesses from startup through stock distribution to investors. Roy is active in the business law sections of the California Bar Association and the Sonoma County Bar Association, and has a Bachelor of Science degree in Business Administration from the University of Wyoming. Most importantly, Roy is a small business owner who puts into practice the principles he teaches.

Workshop overview:

There are three purposes for business plans, each requiring a unique plan: 1) internal use; 2) bank financing; and 3) investor solicitation. In this hands-on workshop, you will not only understand the purpose and design of each type, but will actually create your business plan during the workshop! If you currently have a business plan, bring it on your laptop. Also bring your 1-year, 3-year and 5-year goals, and if you are a going concern, bring your company's financial statements with you. But most importantly of all, be ready to write or update your business plan right in the workshop!

At the end of this workshop, participants should be able to:

- 1. Understand what a business plan is;
- 2. Understand the three unique purposes of a business plan, and how the plan is different for each purpose;
- 3. Have an initial draft of a business plan by the end of the workshop.

Participants may want to bring:

Current business plan, if any Calculator and/or Laptop Current financial statements

Saturday, October 29, 2016 – 9:00 am – 12:00 pm Workshop Title: Small Business Marketing

Workshop Presenter Name: Tom Tjerandsen

Presenter's Current Affiliation and Brief Bio: Recently retired as CEO of a multibillion dollar food company. For 12 years taught both graduate and undergraduate

evening classes in Marketing and Advertising at San Francisco State and Golden Gate Universities.

Workshop overview: This seminar is designed to first provide a general overview of the full range of available marketing tactics, followed by an in-depth exploration of the ways in which they can be incorporated into a solid business plan. Topics range from naming and registering a company, relative merits of various organizational options, product development and testing, review of distribution channels and consideration of various affordable promotion options.

At the end of this workshop, participants should be able to:

- 1. Gather the information needed to confirm the viability of their business concept.
- 2. Understand the likely costs associated with moving forward.
- 3. Understand the importance of the 4 P's: Price, Product, Place, and Promotion.
- 4. Clearly define the inputs required to develop a defensible business plan.

Participants are encouraged to ask questions that relate to their specific business concept, as well as to share insights gained from their business experience to date.

Saturday, November 5, 2016 – 9:00 am – 12:00 pm Workshop Title: Rock Your Holidays with Great Promotions, plus 12 Creative Ideas You Can Use

Workshop Presenter Name: LynAnn King, KingSings PR, Marketing Strategist & Publicist

Presenter's Current Affiliation and Brief Bio:

LynAnn King partners with successful small businesses and empowers entrepreneurs to deliver compelling marketing communications, special events promotions and media campaigns. She brings her visionary leadership in rolling out creative marketing campaigns that create visibility and media coverage. Her clients partner with KingSings PR as their marketing and publicity expert. www.KingSingsPR.com Authorized Local Expert (ALE) with Constant Contact

Workshop overview:

It's that time of year – the hustle and bustle of the holiday season is upon us. There is no better time to reach out to your customers, bring new clients in, and boost repeat and referral business! Whether you have a retail shop, provide a specialized service or work business-to-business, or have a nonprofit in need out outreach, this workshop will provide practical tips for closing out 2016 on a high note. Participants will learn:

- How to leverage social media to engage new and existing customers
- Which promotions and special offers work for your business right now

- Best ways to drive response from your emails and social posts
- Easy strategies to keep your offers looking good on a cell phone or tablet
- How to create and manage a campaign for the holidays (it's easier than you might think!)
- Create a simple playbook to plan your marketing activities all season long
- Most importantly, how to measure your results to get more out of your effort along the way

Please come ready to meet other small business owners and nonprofit professionals. We are all wearing many hats, and we can all share and learn from each other. This session is best suited to those interested in online marketing. All skill levels are welcome. The subject matter is less about technology and more about how to grow your business or organization. Join us – and rock your holidays this year!

Wednesday, November 9, 2016 – 6:00 – 9:00 pm Workshop Title: Rewiring Your Brain for Success

Workshop Presenter Name: Steven Campbell

Presenter's Current Affiliation and Brief Bio:

Author of Making Your Mind Magnificent, Steven Campbell, acquired his Masters in Information Systems from the University of San Franicsco and spent the next twenty years doing what he loves most: teaching, where he taught as both a college professor and an Educational Dean. Steven now conducts seminars around America on the discoveries cognitive psychology has made about understanding how we think ...and why we feel the way we feel.

Workshop overview:

Steven presents an eye-opening look at the latest research on how our brains conform to the messages we give them. When we optimize those messages, our brains will literally rewire themselves again to create new, positive self-images of who we want to be.

This is formally called "neuroplasticity."

Understanding this opens doors to create more success in our health, personal relationships, and in our businesses.

It's not magic...it's science!

- 1. Apply practical knowledge of cutting edge brain research on creating success, better health, loving relationships and overcoming your fears
- 2. Have the capacity to create new neural pathways which enhance your life

- 3. Understand the relationship between your brain and your emotions and how to train them both to your advantage
- 4. Know how to cause your left/right brain to work seamlessly
- 5. Possess the surprising power of thinking differently when you mess up

Saturday, November 12, 2016 – 9:00 am – 12:00 pm Workshop Title: Sales and Profit Growth

Presenter's Current Affiliation and Brief Bio:

Carter Welch of Denali Growth Partners, has a passion for helping businesses conquer their own mountains, to identify their best opportunities for change and innovation to drive growth in sales, market share and profit. Over the past 30 years, Carter has developed the Denali Growth Process to meet the needs of smaller businesses. Also a "Marketing 100" award-winning senior executive, he has worked for a very broad range of companies – great marketers like Procter & Gamble, and also very small organizations, with only a handful of employees.

Workshop overview:

In this workshop, we will help people identify strategies and develop plans to generate significant revenue growth – quickly. We will focus on the key factors that are critical to master in driving profitable, sustainable growth in revenue. You will learn how to change your company to be stronger in each of these key areas. We will help you identify ways to achieve the following:

- 1. Attract new customers
- 2. Strengthen connections and relationships with existing customers
- 3. Gain customer referrals
- 4. Make your marketing budget go further
- 5. Identify the best marketing tools
- 6. Measure the impact of your marketing
- 7. Understand online trends and identify the most relevant online tools for your company and your situation
- 8. Develop a more integrated strategy of sales and marketing

During the workshop we will focus on the 10 critical factors to successful sales growth and help you develop very specific strategies and plans to grow. We will offer over 100 different tips and recommendations that will help you grow.

- 1. Have a clearer vision for growth with your team understanding and embracing it.
- 2. Implement at least 25 different specific steps to take IMMEDIATELY that can have a positive impact on driving sales growth for your business.
- 3. Walk away with several ideas to address your #1 specific sales challenge.

If you have specific sales challenges you face, please bring notes so that we can discuss your specific sales challenge and identify several potential ideas to help address your specific need.

Saturday, November 19, 2016 – 9:00 am – 12:00 pm Workshop Title: Turning Your Great Idea Into A Business

Workshop Presenter Name: Dana Jacoby

Presenter's Current Affiliation and Brief Bio:

Dana is a certified executive coach and leadership development consultant with over thirty years' experience in global business. She has facilitated Stanford University's Graduate School of Business Interpersonal Dynamics program and conducted a wide variety of leadership development programs. Dana has a master's in Organization Development and is a SCORE mentor.

Workshop overview:

Does this sound familiar: "What a great idea! You should start a business!" Do you believe in your idea but don't know the first step in how to make it a reality and realize its full potential? Do you wonder if your idea is good enough to pursue or if you have the capacity and perseverance to get a business off the ground?

In this highly interactive and supportive workshop you will take those first steps to put your idea forward and transform your great idea into a successful enterprise.

This is a workshop where you will roll your sleeves up and work!

At the end of this workshop, participants should be able to:

- 1. Assess your entrepreneurial skill set, identifying your strengths and opportunities
- 2. Use a step-by-step process to craft an elevator pitch, practice and gain feedback on your pitch in class to make it stronger and more compelling
- 3. Walk away with a clearer direction and next steps on your journey to turn your business idea into reality.

Wednesday, December 7, 2016 – 6:00 – 9:00 pm Workshop Title: Running Your Business on a Tablet

Workshop Presenter: Dan Chapin

Presenter's Current Affiliation and Brief Bio:

Dan Chapin, a California native, began his career as an Information Systems and Business Analyst in the wine business with Robert Mondavi Winery and Allied Domecq

Wine & Spirits USA. Dan joined several start-up ventures in the wine business technology space including Inertia Beverage Group (Wine Direct), Artisan Media, and Vintegrate Winery Software. His most recent endeavors include the launch of Left Coast Marketing & Wine Country Lifestyle Magazine working with a creative team to provide Digital Marketing, Design & Print, Photography, & Custom Publishing services with over 75 clients on the "Left Coast" and beyond.

Workshop overview:

Too busy to run your business from your desk? The world is changing and demand for conducting work from out of the office is growing. Join us as Dan Chapin, digital marketing guru, shows you how to run your business from a tablet with various applications and tools. Topics will include: The Cloud - Doc Management, Customer Relationship Manager (CRM), Email Marketing, Website Builder, Social Media tools.

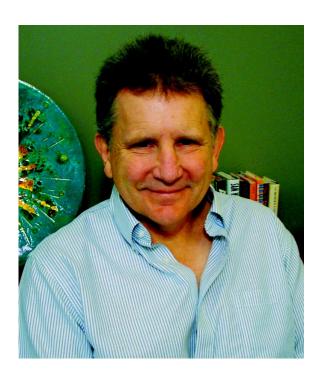


Photo of Jeffrey Schmidt for Dec. 10 Workshop

Saturday, December 10, 2016 – 9:00 am – 12:00 pm Workshop Title: Create Marketing Based on the Latest Neuroscience

Workshop Presenter Name: Jeffrey Schmidt

Presenter's Current Affiliation and Brief Bio:

Jeffrey Schmidt owns DeepSky Marketing, which serves the promotional needs of sustainable companies and Agency for Earth, a social marketing firm that helps nonprofits and government agencies with environmental outreach campaigns. Jeffrey started his career in marketing research helping companies like Bank of America, Wells Fargo, Allstate, and Clorox find out what their customers want.

Workshop overview:

Want to learn from a pro how to target your market, create messaging that sells, and how to "get out of your own way" in this and other crucial areas in your business? The latest neuroscience will help you in all these areas.

For many companies marketing is the critical difference between just getting by and true success, with all the monetary and life-style benefits this involves.

This workshop will provide you with a base of understanding in these areas and you'll be involved in writing and other exercises that will help you learn by doing. You'll also learn from others, and they will benefit from you. Bring your pad, pencil and ideas about how to make your marketing work. You'll walk away with a learning experience that will fuel your business for years to come.

Come ready to participate. Learning happens best when in conversation. Also, be ready to be succinct. We'll have a lot of material to work through and I'll want as many people as possible to share the conversation. Prepare to make room for others so you can learn from the circumstances of your fellow attendees.

- 1. Target the people you need to connect with via SEO, social and traditional media
- 2. Create messaging that sells. . . see how and when to use it
- 3. Get to know the latest neuroscience: why is making a good first impression is so important in the hearts and minds of your target audience
- 4. Understand how many of us get in the way of our own success by maintaining unconscious strategies that served us long ago, but not anymore
- 5. Take home at least two neuroscience tools to help you succeed personally and professionally
- 6. Walk away with the targeting, messaging and personal tools you need to create a marketing plan that works