

Southwest Wisconsin SBDC process:

1. All clients signup via a quick and easy online form, which normally takes 5-10 minutes. Upon completion the system will email both the client and the SW WI office - <http://tinyurl.com/SWWISBDC>
2. For most clients, step 2 is a call from the experts at the Wisconsin SBDC Business AnswerLine (BAL). Rolfe and Bob help clients get initial questions answered about topics like business registration, types, financing options, permits, licensing, taxes, regulations, and other new business questions.
3. Before scheduling the initial consultation with Brock most clients are asked to complete a one-page business information document based on their business status (new, existing, or purchase). These documents are available from the BAL or Brock and most clients spend an hour or less to complete them.
 - o Clients have expressed appreciation for the focus this document provides by writing ideas down
 - o Clients who have already started on a business plan can send that in place of this form
4. Upon receipt of the needed business information document (or business plan) Brock will schedule an initial phone conversation or in-person meeting depending on schedules.

How a consulting session works:

Brock first learns about your background and situation so he can help you attain your goals. Each interaction varies by the business type and needs, and all discussion is tailored to your needs. In business there are a lot of concerns and questions. Our process brings focus so you understand what needs to be done and how to do it.

How to prepare for the first meeting and what to bring:

- ✓ Write down and bring your most important questions and topics you would like to discuss.
- ✓ Be ready to talk about the business concept and your experience.
- ✓ Be open minded and ready to listen (you will likely want to take notes).
- ✓ (Optional) People who want to create financial statements should bring the following lists
 - o Startup Expenses (what you need to get the doors open)
 - o Fixed Expenses (recurring costs each month or year like rent, insurance, utilities, and so on)
 - o Variable Expenses (costs that vary with each sale like cost of goods sold, shipping, and so on)
 - o Sales estimates (and how you created them)

Success stories from 2017 for the Southwest Wisconsin - SBDC:

- o Existing Business Success Story (Paul Saether):
<http://www.wisconsinsbdc.org/client-success/blanchard-hall-family-deep-business-roots-opens-event-facility>
- o New Business Success Story (Ryan Kaiser):
<http://www.wisconsinsbdc.org/client-success/kaiser-nano-tech-learning-listening>

Learn more about the Southwest Wisconsin - SBDC:

Website: www.wisconsinsbdc.org/swwi

Newsletter Signup: <http://tinyurl.com/SwWiSbdcNews>

Learn more about the SBDC Wisconsin Business AnswerLine (BAL):

Website: www.wisconsinsbdc.org/business-answerline Phone:

(800) 940-7232