Follow-up Session Process

Before counseling session:

☐Confirm appointment at least one working day in advance.

☐Prepare for appointment by reading the notes in Neoserra. Make sure any research and assignments promised to client have been completed.

☐Review IBISWorld Industry Report and any demographic report run for the client's business specific industry.

During counseling session:

☐Re-cap previous session with the client.

☐Review Action Plan, any assignments (e.g. business plan worksheets, startup costs, etc.) and discuss progress.

☐ Move forward with the next action steps in their Action Plan utilizing resources and tools.

☐Provide deliverables and additional homework if applicable.

☐Schedule follow-up appointment if needed.

☐Remind the client about the Client Survey they will be receiving via email. Let them know it should take them no more than three minutes to complete.

After counseling session:

☐Capture the notes in Neoserra and gauge whether or not there is Economic Impact to collect.

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