Follow-up Session Guide

Purpose: This tool is to be used as a guide to continue gathering background information, refine the assessment of the client's needs, and refine the plan for working with the client.

Prior to session: Counselor reviews previous session notes and homework assignments

Session guidance:

☐What's happened since we last spoke?Click here to enter text.

☐Review completed client and counselor homework assignments.Click here to enter text.

☐Review completed research with client. Click here to enter text.

☐What other steps have you taken since we last met?Click here to enter text.

☐What roadblocks, if any, have come up since we last met? Click here to enter text.

☐Assess if client is still on track with action plan? If not, reassess and amend action plan.

☐**Review the following with client:**

   ☐**Product/Service:** What are your products and/or services? Click here to enter text.
   Is it a solution to a problem or does it meet a need? Click here to enter text.

   ☐**Pricing:** How will you price your product or service?Click here to enter text.

   ☐**Marketing:** How will you attract customers to purchase your products/services? Click here to enter text.

   ☐**Customers:** Who will purchase your products/services? Click here to enter text.Why? Click here to enter text.

   ☐**Business Location**: Where will your business be located? Click here to enter text.What kind of facility do you need? Click here to enter text.Online?Click here to enter text.

   ☐**Competition**: Who is your competition?Click here to enter text. Where do you fit with your competition?Click here to enter text.

   ☐**Management**: What skills do you have that will benefit the business? Click here to enter text.What skills will you need to add for business success?Click here to enter text.

   ☐**Operations:** Facility layout, workflow, product/service delivery method, software applications, identify/discuss at least two main suppliers. Click here to enter text.

   ☐**Staffing:** How many people, with what kinds of skills, will your business need?Click here to enter text.

   ☐**Financial Needs:** How much will it cost to start your business and keep your business going until you make a profit? Click here to enter text.

   ☐**Banking Relationship:** Have you identified a specific business bank? Click here to enter text.

   ☐**Accounting:** Who will do your business bookkeeping? Click here to enter text.Taxes (GRT, Payroll, Income)?Click here to enter text.

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Resources:

☐**Basic Steps to Registering Business:** Review document with client.

☐**SBDCnet**: Is a research request submitted? ☐Yes ☐No
If yes, SBDCnet research shared with client? ☐Yes ☐No

☐**IBISWorld:** Has an IBIS report been discussed and shared with client? ☐Yes ☐No

☐**ReferenceUSA:** Click here to enter text.

☐**DemographicsNow:** Click here to enter text.

☐**Other resources:** Click here to enter text.

Handouts:

Given to client: Click here to enter text.

Webpages Reviewed: Click here to enter text.

Referred to: Click here to enter text.

Other: Click here to enter text.

Items to send: Click here to enter text.

Other: Click here to enter text.

Impact review:

Milestone Potential: Click here to enter text.
Investment: Click here to enter text.
Loan: Click here to enter text.
Jobs: Click here to enter text.
New Business:Click here to enter text.

If impact has occurred, Economic Impact Form:
    Completed and signed: ☐Yes ☐No
    Uploaded to Neoserra Milestone and/or Capital Funding: ☐Yes ☐No

For next session: Scheduled Date: Click here to enter a date. **Time:** Click here to enter text.

Client homework assignment: Click here to enter text.

SBDC homework assignment: Click here to enter text.

Important: Enter session notes in Neoserra, to include the following:
    ☐Description of what happened during session: Click here to enter text.
    ☐Identification or analysis of problem or opportunity: Click here to enter text.
    ☐Actions taken, recommendations made, follow-up, and next step, if any: Click here to enter text.

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