AMERICA'S SBDC NEW MEXICO

Initial Session Process

Before counseling session:

☐Confirm appointment at least one working day in advance.

☐Prepare for appointment by reviewing Ecenter registration.

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

During counseling session:

☐Intro and warm-up

- Establish rapport, share common ground, create and build trust
- Discuss briefly "why they came in today" and how they heard about us

☐Share our Story (Storybook) "let me share a little bit about SBDC, who we are, what we do, and how we may be able to help you with what you are trying to do."

☐Assess the client's business need by asking diagnostic questions on Initial Session Guide.

☐Recap the summary of their confirmed needs.

☐Develop Action Plan

☐Provide insights and recommendations for goals accomplishment through professional and business development training and ongoing counseling sessions

☐Gauge whether or not there is potential for Economic Impact.

☐Provide Deliverables

☐Issue homework assignment if needed.

☐Schedule a 'firm' follow up appointment

After counseling session:

☐Capture the notes in Neoserra