



Level 1: Business Counselor Professional Development Skill Certification Program

Completion due within one year of hire start date.

Name: _____ Position: _____ Center: SBDC@

Hire Date: _____ Required Completion Date: _____

<u>Elements</u>	<u>Core Competencies</u> Below Are The Items For A Level One Counselor To complete. For new counselors, the Center Director coordinates with the counselor to create the plan and evaluate their accomplishments toward completing each item. For new Center Directors, the Lead Center designates an evaluator to coordinate, create the plan and evaluate their accomplishments towards completing each item.	<u>Plan</u> List the training, education, and/or actions towards fulfillment of each item below or on a referenced attachment.	<u>Completion Date</u>
<u>Business Planning, including Strategic Planning and Business Plan Development</u>	<p>a. Identify and assess the critical business issues facing the existing business client based on inputs such as client interviews.</p> <p>b. Assess the start-up client's readiness and needs.</p> <p>c. Identify available resources and tools including current Federal and State government laws and regulations and services available via multiple sources.</p> <p>d. Develop an action plan with activities and next steps with the client.</p>		
<u>Marketing</u>	<p>a. Direct clients to proper sources for market research (SBDC net services).</p> <p>b. Assist clients in developing and implementing an action plan.</p>		
<u>Communication skills</u>	<p>a. Active listening.</p> <p>b. Effective client interviewing using open-ended questions.</p> <p>c. Creative problem solving.</p> <p>d. The ability to manage difficult people.</p>		
<u>Consulting / Counseling Techniques</u>	<p>a. Display knowledge and use of effective consulting/counseling and coaching techniques.</p> <p>b. Assist client to set goals within an action plan.</p>		



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c. Understand how to develop a standard consulting/counseling session outline that serves as a diagnostic tool for effectively assessing the client.
d. Identify consulting/counseling tools/resources and how they would be used.

e. Understand and demonstrate when to use team based consulting/counseling.

f. (No longer used, moved to Onboarding 02/2024).

g. Demonstrate understanding of identifying high growth/high opportunity clients and how to engage the state/region-wide services available.

h. Demonstrate an understanding and awareness of Cultural diversity.

i. Understand and comply with the State/Region Code of Professional Conduct:

1. Conflict of interest policies
2. Client confidentiality requirements
3. Ethics
4. Educational or host organization policies (to be covered by College or host organization)
5. Introduction to core competencies

Plan Created

Employee Signature: _____ Date: _____ Evaluator Signature: _____ Date: _____

Plan Accepted

Associate State Director Signature: _____ Date: _____

Plan Completed

Employee: _____ Date: _____ Evaluator: _____ Date: _____

I certify that the above PD level has been completed and that the counselor/director has earned Level 1 Business Counselor Certification. The ASD verifies the required program information is uploaded and uploads the completed plan to the counselor/director PD plan in Neoserra.

Associate State Director: _____ Date: _____