



Level 2: Business Counselor Professional Development Skill Certification Program

(365 days to complete after Level 1 earned)

Name: _____ Position: _____ Center: SBDC@
 Start Date: _____ Required Completion Date: _____

<u>Element</u>	<u>Core Competencies</u> Below Are The Items For A Level 2 Counselor To complete. For counselors, the Center Director coordinates with the counselor to create the plan and evaluate their accomplishments toward completing each item. For 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 Core Competencies 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 <u>such as financial statements operating information and external customer/market data.</u></p> <p>e. Identify different types of business plans and the purpose and use of each</p> <p>f. Understand the components of a business plan and be able to explain/demonstrate them to a client</p> <p>g. Effectively assist clients to develop a business plan</p> <p>h. Understand the cybersecurity risks facing small businesses and effectively communicate awareness to clients</p> <p>i. Demonstrate understanding of businesses appropriate for growth through government procurement opportunities</p>		
<u>Consulting / Counseling Techniques</u>	<p>j. Understand how to use AI for client counseling within NMSBDC Program guidelines (effective CY26)</p> <p>k. Understand leadership approaches and styles necessary to successfully motivate and manage employees and be able to teach that knowledge to clients and model it for them.</p>		



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<u>Financial Analysis</u>	<p>a. Identify businesses costs.</p> <p>b. Determine what the gross profit margin is and relate to the client why it is important.</p> <p>c. Determine what sales volume is needed to break even.</p> <p>d. Know the effect of delayed collections on cash flow.</p> <p>e. Know the difference between margin and markup.</p> <p>f. Know how to monitor gross, operating, and net profit margins.</p>		
<u>Accounting</u>	<p>a. Be knowledgeable of and have a basic understanding of electronic and paper recordkeeping systems.</p> <p>b. Be knowledgeable of Cash basis vs. Accrual basis of accounting</p> <p>c. Be Knowledgeable of federal, state and local taxes.</p>		
<u>Marketing</u>	<p>c. Effectively assist clients to understand basic selling skills</p> <p>d. Effectively assist clients in developing a compelling, professional sales presentation</p> <p>e. Identify and define four P's of marketing – product, price, place & promotion</p> <p>f. Identify and define the five segments of promotion – advertising, personal selling, public relations, sales promotion and direct marketing</p>		



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	<p>g. Assist clients in how to do fundamental, cost effective:</p> <ol style="list-style-type: none"> 1. Market research 2. Market analysis 3. Customer research 4. Competitive analysis <p>h. Assist clients in developing strategies and tactics to:</p> <ol style="list-style-type: none"> 1. Find/acquire new customers 2. Satisfy 3. Grow 4. Keep <p>i. Knowledge and understanding of how to assist clients in internet marketing campaigns.</p> <p>j. Knowledge and understanding of how to assist clients in research.</p> <p>k. Knowledge and understanding of how to assist clients with Newsletters.</p> <p>l. Knowledge and understanding of how to assist clients with Blogs and other emerging electronic and social networking tools that can used by small business clients.</p> <p>m. Knowledge and understanding of how to assist clients with Relationship marketing.</p>		
<u>Assistance with Access to Capital</u>	<p>a. Identify financing sources to include:</p> <ol style="list-style-type: none"> 1. State and local loan/economic development programs 2. Federally sponsored programs 		



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	<ul style="list-style-type: none">3. Banks4. Internal methods of financing – bootstrapping5. Initial public offering, funding using an LLC6. Angel investing groups7. Venture capital8. Equity capital <p>b. knowledgeable of credit reports and credit scoring.</p>		
Plan Created	Employee: _____ Date: _____ Evaluator: _____ Date: _____		
Plan Accepted	Associate State Director : _____ 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 2 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.

ASD: _____ Date: _____