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| **Element** | **Core Competencies**  Below Are The Items For A Level Three Counselor. For counselors, the Center Director coordinates with the counselor to create the plan and evaluate their accomplishments toward completing each item of a specific Element. For Center Directors, the Lead Center designates an evaluator to coordinate, create the plan and evaluate their accomplishments towards completing each item for a specific Element. | **Plan**  List the training, education, and/or actions towards fulfillment of Core Competencies below or on a referenced attachment. | **Completion Date** |
| Business Planning, including Strategic Planning and Business Plan Development | **j.** Identify and convey to the client the basic steps and considerations for starting or buying a business or franchise and selling, transferring or liquidating a business or franchise.  **k.** Assist in developing a strategic plan using tools such as a SWOT analysis, Porter’s 5-Forces or other strategic tools.  **l.** Effectively assist clients in implementing their business plan.  **m.** Understand how intellectual property protections should be considered in the business plans and growth strategies of small businesses. |  |  |
| Financial Analysis | g. Track and forecast cash flow.  **h.** Know how to estimate minimum cash (working capital) reserves.  **i.** Know how to use business ratios and industry averages.  **j**. Effectively convey all of the above concepts to clients.  **k.** Understand and effectively convey to clients key financial management issues including costs, cash flow, break-even, gross profit margin, forecasting, business ratios and industry averages, and financial statements. |  |  |
| Accounting | d. Be able to teach a client how to hire and pay an employee in the specific State/Region.  e. Provide resources for setting up a company using electronic software such as Quick Books.  f. Create financial statements.  g. Account for A/P and A/R.  h. Account for COGS (Beg. Inv. + Purchases – End Inventory)  i. Demonstrate knowledge of each part of the Accounting Equation  j. Demonstrate knowledge of invoicing and collections.  k. Demonstrate knowledge of internal controls necessary to minimize theft. |  |  |
| Marketing | n. Understand competitive strengths and how to perform a competitive analysis (SWOT)  o. Assist clients in developing a “superior” value proposition  p. Assist clients in developing a marketing plan consisting of a strategic plan and a tactical plan. Concise strategies will be developed for:   1. Products/services 2. Targeting 3. Positioning 4. Pricing 5. Value proposition (Why should I choose you?) 6. Distribution (Go to market strategy) 7. Communication (the message and the media) |  |  |
| Assistance with Access to Capital | c. Identify and define financing strategies  d. The factors considered for project/loan approval via each financing vehicle  e. How to convert an unfundable project/proposal to one that is fundable  f. Understanding how to effectively combine a myriad of financing programs – investors, banks and government loans when necessary to fund the project  g. Understand and demonstrate a fundable loan proposal  h. Assist in developing the loan proposal to include two year month to month financial projections  i. Amortization schedules  j. Leases |  |  |
| **Plan created**  **Plan Accepted** | Employee: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_ Evaluator: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_  Associate State Director:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date:\_\_\_\_\_\_\_\_\_\_ | |  |
| **Plan**  **Completed** | Employee: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_ Evaluator: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_ | |

I certify that the above professional development level has been completed and that the counselor/director has earned an Element of Level 3 Business Counselor Certification. ASD to verify uploaded information required under this program and upload this completed plan to the counselor/director PD plan in Neoserra.

ASD: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_