

Module 4 Designing & Delivering Your Program

Objectives

By the end of this module, you will be able to:

- ◆ Design a curriculum that meets the needs of your clients within the parameters of your program.
- ◆ Create fun, participatory workshop activities.
- ◆ Assess the skills and knowledge of your trainers and coaches.
- ◆ Put together a participant workbook.
- ◆ Set up client files.



Activity #1 Designing Your Curriculum

You have probably developed a good idea of your clients' needs through the intake process as well as through the needs assessment you did earlier on. When designing your curriculum, consider the following:

- ◆ Overall format and goals of your program
- ◆ Clients' business skills and knowledge needs
- ◆ Clients' personal development or life skills needs
- ◆ Total # of workshops
- ◆ Total hours of individual coaching time
- ◆ Total time for clients to conduct self-directed research
- ◆ Logical progression and timing of topics
- ◆ Alternative learning activities and business events

You will probably want to offer a balance of business and personal development topics in order to help your clients develop the skills and knowledge they need as well as the confidence to start their own business. Consider referring to life skills workshops as “business management skills” when speaking with your clients.



Check out the sample curriculum in your toolbox!



Have a look at the menu of workshops listed on the next page. Topics are organized according to sections of the business plan, business management skills and computer skills, **not in a suggested order or grouping of training delivery.**

Example:

You will probably want to show participants how to survey their market early on, and then give them a week to conduct some actual surveys. In the meantime, you can use your workshop time for business management skills and some preliminary sessions on financial management. It will not make sense to keep on delivering marketing workshops on topics such as promotion until your clients are able to get a grip on who and where their target market is.

Once you have decided which topics you will include in your curriculum, have some fun designing your workshops. Think of different ways to help people grasp each subject. Learning can happen in many experiential ways.



Check out the 25 great ideas in your toolbox!



◆ Workshop Topics ◆

Welcome

- ◆ Getting to know you activities
- ◆ Program review
- ◆ Learning contracts
- ◆ Group agreements and expectations
- ◆ Program contact person
- ◆ Orientation package
- ◆ Tour

Overview of the Business Plan

- ◆ Purpose, content, format

Developing a Marketing Plan

- ◆ Surveying and researching your market
- ◆ Using research results
- ◆ Competitive analysis
- ◆ Risk analysis
- ◆ Pricing and costing
- ◆ Advertising and promotion
- ◆ Location
- ◆ Choosing a business name

Developing a Financial Plan

- ◆ Cash flow forecasting
- ◆ Understanding financial statements
- ◆ Income statements and balance sheets
- ◆ Financing your business

Developing an Executive Summary

- ◆ Mission statement
- ◆ Business description
- ◆ Management profile

Setting Up Your Business Operations

- ◆ Hours
- ◆ Facilities/setting up a home office
- ◆ Communication systems



- ◆ Equipment
- ◆ Banking
- ◆ Insurance

The Organization of Your Business

- ◆ Legal, licenses and business registration
- ◆ Human resources
- ◆ Business mentors/advisors
- ◆ Suppliers

Managing Your Business

- ◆ Strategic planning and goal setting
- ◆ Time management
- ◆ Decision making skills
- ◆ Selling skills
- ◆ Negotiating skills
- ◆ Networking skills
- ◆ Presentation skills
- ◆ Business writing
- ◆ Stress management
- ◆ Developing self confidence
- ◆ Bookkeeping
- ◆ Credit and collections
- ◆ Taxation

Computer Skills

- ◆ Dos and Windows
- ◆ Word Processing
- ◆ Accounting
- ◆ Graphic Arts
- ◆ Project Management
- ◆ Using the Internet

Wrap-up

- ◆ Creating support networks
- ◆ Next steps
- ◆ Business plan presentations
- ◆ Celebrations and certificates of achievement



Activity #2 Your Skills & Knowledge

When you are putting together a team of people to deliver your program, look for a mix of backgrounds and expertise. Each individual does not necessarily need to have all of the skills on this list, but should complement the skills of the other trainers/coaches.

Business Trainers/Coaches have:

- ◆ Multiple roles (business and personal support to clients)
- ◆ Conflicting goals (to support clients and to monitor progress)

Most Business Trainers/Coaches therefore need to have:

- ◆ Human empathy and the ability to establish and maintain rapport with clients
- ◆ Technical business knowledge in most parts of the business plan
- ◆ Practical experience and know-how in operating a business

Decide who is best suited to deliver each workshop, and who will provide the individual business coaching services.



Check out the self assessment tool for business trainers and coaches in your toolbox!



Activity #3 Putting Together Client Workbooks

On the first day of training, you will want to provide your clients with a workbook so that they can keep all of their program information in one place, and be able to add workshop hand-outs and notes. Here are some suggestions of things to include in a binder:

Section 1: Program Information

- ◆ Curriculum that include dates, times, topics and name of trainers. Consider setting this up in a calendar style so that the training schedule can also be used as a date book for clients to record all business activities. This will help them to avoid booking appointments during scheduled training times.
- ◆ Contact information for training organization, including an emergency contact person and telephone number to call the day of the workshop if client is unable to attend.
- ◆ Copy of signed learning contract/participant agreement.
- ◆ Copy of signed release form for training organization to collect and release certain information for statistical purposes.
- ◆ Organization's dispute resolution process and any other policy related information.

Section 2: Workbook

- ◆ Core training materials.
- ◆ Space to add handouts and notes during the training program for each topic.
- ◆ Journal or blank notebook for clients to record their private thoughts.

Section 3: Reference

- ◆ Business glossary of terms.
- ◆ List of business resources and local community organizations.
- ◆ List of suggested reference books, videos and Internet sites.

Section 4: The Business Plan

- ◆ Fill-in-the-blank business plan.
- ◆ Dividers for each business plan section to help clients organize their research and build their business plan throughout the training program.
- ◆ This could also be a separate binder for clients to keep at home.



Check out the sample participant agreement in your toolbox!



Activity #4 Setting Up Client Files

It is important to set up client files in a consistent way so that information can be easily retrieved. This is particularly true if more than one person is accessing files during business coaching sessions or for information collection purposes. Here are some suggestions on what to include in each client file, and where to put each item in the file folder:

Attached on the left:

- ◆ Quick reference sheet, including: client contact information; date of birth; social insurance number; whether or not receiving government assistance; type of assistance; contact information for government assistance office and worker; emergency contact information; special needs arrangements; and list of business loans, if applicable.
- ◆ Client monitoring form listing date of each coaching session, year-to-date total of monthly revenues and expenses, special comments, and coach's initials.

Loose in the middle:

- ◆ Business plan.
- ◆ Copy of promotional materials.

Attached on the right:

- ◆ Original application package, including completed application form, reference letters, business outline and notes from the interview.
- ◆ Signed client learning contract and release form.
- ◆ Regular action plans in chronological order.
- ◆ Regular business reports in chronological order.
- ◆ Notes from coaching sessions in chronological order.



Food For Thought



Lessons Learned

- #1 Allow sufficient time for clients to conduct their own research and pursue individual business activities throughout the training program.
- #2 Provide time during workshops for clients to complete appropriate parts of their business plan, and have mini deadlines every week. This will help clients absorb information and progress step by step instead of leaving the development of their business plan to the last minute.

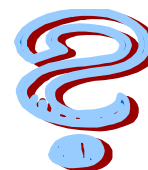
Example:

During the advertising and promotion workshop, provide samples and time for clients to develop a draft brochure.

- #3 Schedule required individual coaching sessions throughout the training program. It is easier to help clients progress and take responsibility for their own learning if they meet with the same coach each time and complete an action plan at the end of each session.



Discussion Questions



Individually and/or with your team members, discuss the following:

- #1 At the end of your intake process, you have a pool of participants who are at diverse stages of business readiness. How can you design a training program that meets the needs of clients who are just beginning to research their business idea as well as clients who are fairly advanced with their plans and are nearly ready to start their business?
- #2 At the beginning of a training program, clients are adjusting to being in a learning environment in addition to thinking in a new way. They are also doing a lot of research about their business idea, are gathering lots of information, and are facing new decisions all the time. This can be exciting as well as stressful, particularly if they are also balancing many responsibilities at home and may not have support systems in place. It is quite common for clients to become moderately to severely overwhelmed about 4 or 5 weeks into the program. What can you do to help your clients successfully navigate this process? How can you design your curriculum to meet their needs at this time?

In Your Toolbox



- ✂ Sample Curriculum
- ✂ 25 Great Ideas – How to Create Fun Learning Activities
- ✂ Your Skills & Knowledge: A Self Assessment Tool for Business Trainers & Coaches
- ✂ Sample Participant Agreement (learning contract)

