

Certified Small Business Affiliate (SBA) Training Learning Objectives

LEARNING OBJECTIVES:

1. Have a written economic model* with financial projections for the next 90 days.
2. Understand the role of the Certified Small Business Affiliate (SBA).
3. Be able to apply Prochaska's Stages of Change to your role as a SBA.
4. Exhibit the confidence and competence to teach reoccurring, weekly Access To Capital classes.
5. Illustrate an understanding of the difference between MOU- and Affinity-based relationships.
6. Demonstrate the ability to enroll a client in the deferred deposit, grant-subsidized Capital Ready Program.
7. Know resources available to assist you in being successful.

*Each Access To Capital class projects to generate \$10,000+ (20 attendees, 50% conversion)

AGENDA FOR ONE DAY CERTIFICATION CLASS:

1. Pre-test, Introductions and Overview
2. Financial modeling of the Small Business Affiliate (SBA) role
3. Identify our three-prong competitive advantage
4. Discuss direct and indirect competitors
5. Deep dive into programming and processes:
 - a. Access to Capital Class
 - b. Capital Ready Program
6. Stages of Change discussion
7. Client development process
 - a. Individual clients
 - b. Weekly Access to Capital classes
 - c. Hosts & Affinity relationships
8. Deep dive into the SBA role and processes:
 - a. Holding weekly Access to Capital Classes
 - b. Working with hosts and affinity partners
 - c. Best practices for community engagement
 - d. Getting paid
9. Assessment of learning and Certification examination
10. Q&A