

Organizational Background

Southwest Florida SCORE District 480 (SWD480), SBA Resource Partner: SCORE (Proof of Status attached),
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SCORE is a nonprofit resource partner of the SBA. SCORE is dedicated to educating entrepreneurs and helping small businesses start, grow, and succeed nationwide. In 2014 SCORE's 11,000+ volunteers assisted 56,079 new "Main Street" business startups by providing confidential business mentoring services at no charge. SCORE already has the infrastructure, technology, measurement tools and support in place to attract and serve small businesses and aspiring entrepreneurs. Additionally, to keep pace with changing economic trends and entrepreneurial development resources, SCORE consistently introduces new tools and methodologies to improve our service levels and mentor skills which in turn increase the number of small businesses we help make successful. SCORE historically is the premier small business mentoring provider for underserved groups for 3 reasons 1) there is never a fee for mentoring, 2) many introductory seminars are provided at low or no cost and, 3) we mentor and provide education at client friendly times and locations.

This plan addresses the Southwest Florida District of SCORE #480 (SWD480). Florida has more than 2 million small businesses and that number is growing along with the population. Florida has 67 counties and now places 3rd in most populated states - behind California and Texas. SWD480 resources include 305+ volunteer/mentors. SWD480 is comprised of 8 individual, unique geographically based chapters, each with their own economic ecosystems and demographics, spread across 14 diverse counties. The counties we serve include the largest per capita income county (Collier) in the US through 2 of the lowest per capita counties (Hendry and Hardy). This would provide a valuable data point for the pilot program.

SWD480 has used Lean methodologies in mentoring sessions on an ad-hoc basis.

Background of Representatives for I-Corps training:

Joseph Sousa, is a certified SCORE Mentor. Joe's focus within SCORE is to provide client mentoring on anything to do with technology, including product/service development. Joe also supports the Chapter's e-marketing efforts and delivers technology related seminars. Prior to joining SCORE Joe spent more than twenty years in various technology product/project/program management roles. Joe has worked with a variety of company sizes, from small to very large. Joe has a PMI, PMP certification, Lean/Sigma certifications from IBM and Moresteam University. Joe has some exposure to Lean product development and has used the approach with some clients. Joe has extensive experience with management, development and delivery of learning program and reusable job aids (tools). Joe's adaptation abilities are clearly demonstrated through his consistent positive client feedback.

Joy Pillion, MBA and Certified SCORE Mentor, has more than 25 years of experience working and managing small to large businesses, both for profit and not for profit, and as a business owner herself. The help she personally received from SCORE was the reason she became a SCORE Mentor. This year Joy celebrates 5 years of successfully adapting to the needs of local small businesses and the changes in economic realities of doing business in the 21st century. Joy has excellent communications skills and is a team player. Other experience includes working in regulatory environments, information technology, corporate control audits, HR, training and program management. Joy is a high performing volunteer, able to assist clients, deliver seminars and provide Chapter leadership as the Treasurer. Additionally, she volunteers for many special initiatives to serve our community partners. She is excited about the Lean Start-up Challenge because she has been utilizing her own abbreviated version with some of her small business start-up and she knows it works.

Interest in I-Corps and Lean Curriculum

SCORE SWD480 views itself as a progressive and innovative group of volunteers. Our interests are always to help small businesses be successful and to prosper. All of the Volunteers have seen first-hand the pace of change in business development methodologies. We are faced daily with clients that have a business concept, but lack the wherewithal to bring these concepts to life. As SCORE mentors we provide clients with guidance on how to make their concepts reality.

SCORE mentors armed with I-Corps' Lean training will be able to advise and guide their clients through the start-up phase of business development in a faster and more cost effective way. Many of SCORE's clients have a "general" concept of what they hope or dream of accomplishing. With the iterative approach used in Lean Product development, clients will be able to fine tune their concepts, ultimately driving-up their chance of success.

It is no secret that most small business start-ups fail – often costing the owners significant amounts of capital. The Lean approach of experimentation (tests), on a small scale, will not only increase the chances of success, but will also allow for an exit strategy that is much less costly than traditional practices.

I-Corps trained Mentors will train at least one Mentor from each Chapter to an intermediate level in I-Corps' Lean methodologies that will enable them to support local clients and deliver seminars. The I-Corps trained mentors will repurpose the I-Corps materials to create seminars and tools (worksheets, templates, etc.). These seminars and tools will be used for awareness training within the Chapters, public seminars and used to support mentor activities/sessions.

Target Audience for Adapted I-Corps Curriculum

SCORE provides its services to anyone that requests them. We typically work with small businesses that need specialized assistance and guidance and individuals with aspirations of starting a business. The individuals typically cannot afford to pay for professional services and without SCORE's help, they would have no help. We envision that the capabilities that will be gained by the I-Corps curriculum will be made available to all who request it and or have a suitable need. The target audience will be the geographic and economic strata served by SWD480

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SWD480 is a cohesive organization with open lines of communication between chapters, mentors and the District Director. Each Chapter has strong community partners and unique local community partnerships including Chambers, Colleges, Economic Development Organizations, local governments, and other Business Groups. We have experience in successfully rolling out mentor skills improvement training quickly and thoroughly across a large section of Florida. We have access to state-of-the-art tools that can easily be utilized collecting and measuring new clients, outcomes, feedback, client satisfaction with the Lean methodology and success and highly motivated mentors. The details that follow will address how this pilot program would be implemented to reach across the 8 chapters and touch startups across different economic and other strata in the southwest area of Florida.

Description of Intended Activities

Implementation and Assessment Plan

Lean practices lead to faster and better outcomes (simply stated). The hypothesis is that if Area Businesses are provided with **facilitated** access to Lean resources (tools, education, mentoring assistance), Area Business will create new and or improved products and services. For Area Business to take advantage of the available resources, they must be aware of their existence, have a need/desire for these resources and have easy access to these resources.

To ensure success of this pilot program, measurements and feedback needs to be collected at each phase and on a continuous basis. If the desired outcome is not being achieved, actions need to be taken to improve.

Implementation

Two district Mentor will attend and complete the I-Corps Spring Cohort training. These Mentors will work together to solidify their own proficiency and then create a suite of tools and educational resources (Lean Resources) to be used by the District Chapters. These two Mentors will be the District Lean Leads (DLL).

Mentors from each of the 8 Chapters will be recruited to serve as Chapter Leads (CL). The DLL with the use of the resources they produced will train the CLs, provide ongoing district support and maintenance of the Lean Resources.

The CLs and DLLs will provide, at the regularly scheduled Chapter meetings, an introductory Lean seminar to all Chapter Mentors. The objective of these seminars will be to promote awareness and to have the Mentor as evangelists.

The CLs, DLLs, District and Chapter leadership, utilizing their **existing relationships**, will work with local business groups (Chambers, Development Councils, etc.) to offer awareness seminars to their members.

The CLs and DLL will provide regularly scheduled workshops and seminars to the public through the Chapter's existing educational channels.

The CLs and DLL will be available to provide one-on-one mentoring and training to District clients.

This initiative will include a documented plan with periodic reviews to check and monitor progress and make adjustments as needed.

If awarded, it is envisioned that the award dollars will be used to towards the marginal expenses for the execution of the project. These expenses will include travel, materials reproduction and other miscellaneous expenses.

Assessment Plan

1. Using SCORE's CRM, measure the number of clients mentored using Lean methodologies, and track their progress
2. Using SCORE's NPS survey system and supplemental feedback, measure mentored client's satisfaction and perceptions
3. Using SCORE's survey system measure client's success (revenue and job growth) (this metric may not be available by EoY, if that is the case, a supplemental survey will be implemented)
4. Measure and monitor the number of seminars, attendees and feedback
5. Measure Mentor's perception, across all districts, of the Lean initiative and collect actionable feedback