



INFORMATION

The NC Small Business Advisors' Annual Professional Development (PD) Conference will be held from Tuesday, November 15 through Thursday, November 17, 2016. To ensure that we continue to provide the best business advisory services to our state's small and mid-sized businesses, the SBTDC and SBCN have partnered to deliver quality, needs-based, and cost-effective continuing professional education to our staff. This event also facilitates teamwork and organizational learning by providing opportunities to network and interact with our colleagues, peers, and stakeholders statewide.

All permanent, full-time SBTDC employees and SBCN staff are expected to attend the Joint PD Conference. Absences must be approved by your immediate supervisor, and in turn communicated to Anne Shaw or Scott Daugherty as appropriate.

LOCATION

This year's Joint PD Conference will be held at the Renaissance Asheville Hotel in downtown Asheville. The hotel is within easy walking distance of popular attractions, shopping and entertainment. It offers recently renovated rooms and suites with stunning mountain or city views, free high-speed wireless Internet, and complimentary parking.

CONFERENCE REGISTRATION

This memo provides meeting details and a link for online registration. The total registration fee per person is \$375. You must complete your registration by Monday, October 17, 2016.

Please refer to the detailed agenda and session descriptions in making your training session selections. All SBTDC and SBCN participants must register for a minimum of 12 CPE credit hours. Attendance at some sessions is limited, so your requests will be honored on a first-come, first-served basis (unless otherwise noted).

If you are planning to bring a spouse or friend, you need to register them using our online registration system. Spouse and significant other meal prices are \$20 for breakfast, \$30 for lunch, and \$50 for reception/dinner. You may pay online with Visa or MasterCard, or via personal check by mail or on site.

SBCN/SBTDC, partners and speakers: http://bit.ly/Joint-PD-Register Staff Guests: http://bit.ly/Joint-PD-StaffGuests
Advisory Board: http://bit.ly/Joint-PD-AdvBoard

Per usual, the dress code is business casual for all meetings and activities.





HOTEL RESERVATIONS

We have arranged a block of rooms for Tuesday, November 15, and Wednesday, November 16, at the Renaissance Asheville Hotel at a rate of \$149 plus tax per night (single or double occupancy). The conference rate will also be offered on Monday, November 14, for a limited number of early arrivals, subject to availability. As in the past, you have the option to share your room with another staff member to reduce costs. Check-in time is 4:00 PM and check-out time is 11:00 AM.

You can reserve a sleeping room in the "NCSU Small Business" room block by calling Marriott reservations at (800) 468-3571, or by using our Custom Reservation Web Link (below) by Monday, October 17th, 2016.

http://bit.ly/FallPD2016-hotel

If reserving online, please note that most of you will need to adjust the check-in date to Tuesday, November, 15.

CONFERENCE MATERIALS & APP

This year we are going "paperless" at PD! The materials that are traditionally provided in conference registration packets (agenda, session selections, etc.) will be emailed to everyone by Friday, November 11. If you want hard copies, it will be your responsibility to print and bring them to PD.

We will again offer a Joint PD Conference App. It provides ready access to venue information, the conference agenda, session descriptions, speaker bios, presentations, handouts, and session evaluation surveys. You can input your session selections to display your own schedule, receive PD-related updates and take notes. We encourage everyone to download and use the Joint PD App – further instructions will be provided in early November.

SESSION DESCRIPTIONS

Timing for each session is indicated on the heading and online registration form. As a courtesy to both speakers and participants, please be on time for all sessions and exit *only if absolutely necessary*. Your professional development opportunities are described in the following pages.





TUESDAY

1:00 PM - 3:00 PM

Plenary - Growing Relationships & Harvesting Impacts

Our theme for our 2016 North Carolina Small Business Advisors Conference is "Growing Relationships & Harvesting Impacts".

The proceedings will begin with a Welcome and "State of Small Business" discussion with Scott Daugherty, Anne Shaw, and special guest Dr. James Williamson, President of the NC Community College System.

Next up is a Farm to Fork Showcase that will provide an overview of North Carolina Farm to Fork initiatives and food system economies. Lead by Dr. Rebecca Dunning of NC State's Center for Environmental Farming Systems (CEFS), this session will include a presentation, successful case studies, and Q&A with a panel of experts and area businesses. Topics will include local food supply chains, collaborative partnerships between business developers and agricultural agencies, needs and opportunities for small businesses working within the local food system, and resources and tools that are available to help small and mid-sized producers and processors. 2 CPE Hours

TUESDAY

3:15 PM - 5:15 PM

SBTDC/SBCN Regional Roundtables: Growing Our Partnership

Byron Hicks, SBTDC and Tiffany Henry, SBCN

During these roundtables, SBTDC and SBCN staff will discuss regional needs, industry clusters, events and opportunities, staff backgrounds and skill sets, key organizational metrics, and best practices for client referrals. The goal will be to enhance SBTDC/SBCN ability to efficiently and effectively serve small to mid-size business clients in each region.

SBTDC and SBCN staff will be assigned to one of four regions per a list that will be provided with the Joint PD materials and PD App. 2 CPE Hours





8:30 AM - 10:30 AM

Recipe for Success: SBCN New Director Orientation

Anne Shaw, Interim Statewide Director, SBCN

This interactive session will provide new Directors with answers to their most compelling questions for the effective operation of their Small Business Center. Learn the "rules of the game" and discover the many resources available to SBCs that will lead to strong support of clients and attendees while also ensuring compliance with SBCN Program Guidelines.

This session is a required topic for Level 1 Credentialing for all SBC Directors and is specifically recommended and required for new Directors. 2 CPE Hours

Shucking Your Bias: Overcoming Counselor Bias

Rebecca Barbour, PTAC Counselor, SBTDC

Our internal biases can affect how we as counselors perceive our work, judge our clients, and make decisions and recommendations. This interactive session will provide an overview of common perception and decision-making biases, how to identify them, and how to overcome them to become a better counselor and decision maker. **2 CPE Hours**

Getting Through the Weeds: Social Media Marketing Update

Adrianne Gordon, Director of Marketing & Operations and Sarah Benoit, Director of Training, JB Media

Social media can be a powerful marketing tool for businesses and those who serve business like the SBTDC and SBCN. This session will discuss the latest trends and updates to popular social media platforms and how they apply to marketing for businesses, help counselors better advise clients on social media marketing including what works best for B2C vs. B2B in 2016, and offer ideas to improve marketing for SBTDC and SBCN events based on the most current social media options and trends. **2 CPE Hours**





8:30 AM - 10:30 AM

(continued)

Checking Your Crops: Assessing Progress of Mid-Size Clients

Mary Klock, Counselor, SBTDC

Making the right decisions at the right time is critical. Following through on those decisions is challenging: deploying strategy is much more difficult than developing strategy. How do you know you are making progress? Are We Making Progress? and the companion document for leaders, Are We Making Progress as Leaders?, are designed to help you know. These tools show you whether your perceptions agree with those of your workforce. Questions are organized by the seven "Baldrige Criteria for Performance Excellence" categories, part of the Baldrige Excellence Framework. This session will discuss these assessment tools, how to administer them, and how to tabulate and interpret results. In addition, participants will learn how to use the tools to further engage mid-sized clients in for-fee planning events. 2 CPE Hours

Supporting Agri-Business

Tony Hayes, President & CEO, Trancas LLC;

Rick Larson, SVP & Director of Strategic Initiatives, Natural Capital Investment Fund (NCIF)

This session will provide insights for counselors who have clients working in agriculture related businesses from sustainable rancher/farmers to mid-sized food production facilities. Topics will include farm advocacy, risk management, specialized grants/loans, supply chain issues, and food marketing. Attendees will learn more about available resources for agri-businesses. This session will provide a "best of" synopsis of a full-day program. 2 CPE Hours





10:45 AM - 12:45 PM

Planting the Seeds: SBCN Center IC Orientation for New Directors

Mark Hagenbuch, SBCN Director & Center IC Team Lead for SBCN

This session covers overall use and best practices for Center IC. Topics will include Locations (updating, editing content/links), Sessions (types, appointments, attaching documents); Events/Seminars (template, automatic surveys, reminder emails, verification); and Reports (beta). The session will include live demonstrations and a group discussion to assure that all concerns and questions have been heard.

This session is required for Level 1 Credentialing for all SBC Directors. 2 CPE Hours

Peeling Through the Layers: Overcoming Client Bias

Rebecca Barbour, PTAC Counselor, SBTDC

This session will cover additional biases and errors that may affect counseling, with emphasis on those that *clients* often bring into the relationship. This interactive session with introduce additional perception and decision-making biases and discuss how to work with clients to overcome them. **2 CPE Hours**

Lender Panel - Recipe for Successful Loan Preparation

Josh Owens, Entegra Bank; Tommy Dennison, Carolina Small Business Development Fund; Erika McGiley, NCIF

Entegra Bank (formerly Macon Bank) lenders will join representatives from Carolina Small Business Development Fund (formerly The Support Center) and Natural Capital Investment Fund (NCIF) on a panel to discuss the 5 C's of credit, financial analysis/projections, cash flow and breakeven, loan package development, and how to guide your clients though the lending process.

This session contributes to Level 1 Credentialing for all SBC Directors. 2 CPE Hours





10:45 AM - 12:45 PM

(continued)

Hopping To It: The Business of Beer

Derek Allan & Hayley Wells, Attorneys, Ward & Smith P.A.

With the local brewed beer industry growing at such a rapid rate across NC, many towns and cities are meeting various new challenges when a new brewery decides to open up shop in the area. This session will help counselors better understand the current NC laws towards breweries, how to better build a local economy that is legally ready for this type business, and review possible concerns that may rise as clients work to open a local brewery. Session topics will include basic brewery models, selecting a location, the regulatory framework, what potential owners should know, and examples of towns/cities that are getting it right. 2 CPE Hours

Bringing Home the Bacon: Delivering ProfitCents to Clients

Mark McKnight & William Chase, Counselors, SBTDC

After inputting financial statements into ProfitCents, the real work begins. Knowing how to appropriately share information from the reports helps to build trust and connectivity with clients. This session will discuss how to present the narrative and report to clients, identify key performance indicators, and how to manage follow up sessions based on the ProfitCents report. The facilitators will share case examples, and provide role play opportunities as well. **2 CPE Hours**

WEDNESDAY

2:00 PM - 5:00 PM

During this time slot, you have a choice of three industry focus / tour sessions or free time.

Microwbreweries: The Business of Beer Around Town

Learn more about the business of beer from industry experts, tour some of downtown Asheville's breweries/brewpubs, and find out why Asheville has continuously captured the Beer City USA title since 2009. 2-3 CPE Hours





2:00 PM - 5:00 PM (continued)

Downtown Development: Asheville Renaissance

Learn how downtown Asheville went from down-and-out 40 years ago to the vibrant tourism hub that it is today. 2-3 CPE Hours

Sustainable Agriculture: Down on the Farm

Get a firsthand view of the local food system, sustainable farming practices, and community engagement at a local farm. 2-3 CPE Hours

THURSDAY

8:30 AM - 10:30 AM

Rural Center / Farm Service Agency Partnership

Barry Ryan & Amanda Sorrells, NC Rural Center; Nimasheena Burns (State Office) and Gary Guinn (Buncombe County), Farm Service Agency

The NC Rural Center and Farm Service Agency (FSA) are working together to help farm and food entrepreneurs better understand and access FSA loans and support programs. The FSA delivered nearly \$227.6 million in federal program payments and loans to North Carolina farmers and ranchers during FY2015. Their programs range from microloans and beginning farmer loans to facility loans for value-added production to crop and livestock insurance products. Attendees will learn how to refer clients to FSA programs and receive contact information for FSA program staff serving their area. **2 CPE Hours**



THURSDAY

8:30 AM - 10:30 AM

(continued)

Trusted Advisor Fieldbook - Book Study

Mike Seibert, RSC Director, SBTDC

This will be a facilitated book study of The Trusted Advisor Fieldbook by Charles Green and Andrea Howe. In this hands-on successor to the popular book The Trusted Advisor, participants find answers to pervasive questions about trust and leadership—such as how to develop business with trust, nurture trust-based relationships, build and run a trustworthy organization, and develop trust skill set. This pragmatic workbook delivers everyday tools, exercises, resources, and actionable to-do lists for the wide range of situations a trusted advisor inevitably encounters.

Participants will receive the book in advance of the initial session, along with a "homework" assignment. There will also be 3 book study group follow-up sessions (for which additional CPE credit will be provided). 2 CPE Hours

How to Create, Edit and Send Marketing Emails in Minutes

Aaron Wesley Means, ACTIVATE Business Solutions (Constant Contact Trainer - NC/SC)

This session will provide a hands-on approach allowing you to gain a better understanding of how email marketing can be used to grow your organization or business. During this session you will learn how to access Constant Contact, a trusted email marketing platform. You will learn how to create and edit a draft email including customizing colors, logos, images, layout and many other features of this program. Review best practices for font size, layout and mobile friendly emails. You will also be given the opportunity to learn what to put in your emails to get the best results. 2 CPE Hours

Business Model Canvas 1.0: The Basics

Katy Gould, Small Business Center Director, Haywood Community College

Change the way you think about traditional idea development. This seminar will feature an introduction to the Business Model Canvas, a unique method of describing and thinking through the business model of an organization; that of it's competitors, or potential pivot points for new target markets. Attendees will walk through the introductory ideation phase, the One Page Business Plan, and the Opportunity Discovery Process creating a blueprint for successful innovation and idea development. 2 CPE Hours





THURSDAY

8:30 AM - 10:30 AM

(continued)

Accelerating Client Revenue with the OnDemand Model

Bob Jurkowski, Founding Partner, OnDemand Advisors

Similar to the Business Model Canvas, the Revenue Acceleration Map is a useful tool to assist counselors in effectively coaching clients to grow revenue through sales growth. This method explains the flow of sales generation through critical "funnels" that have a proven track record for driving revenue. Session participants will learn how to use the tool, and hear client testimonials and examples. **2 CPE Hours**

THURSDAY

10:45 AM - 12:45 PM

Time Management and Organization Tools for Professionals

Tonya Snider, Founder/CEO, TenBiz

How much time do you spend in your work doing things that don't contribute to your success? Effectively managing your time can produce results you never thought were possible before. This session will give you tools to prioritize, set goals, manage interruptions and use time blocking and to-do lists to avoid procrastination and get the most out of your day. Specific topics include how to prioritize effectively, getting a grasp on how you spend your time, best tips for getting organized, procrastination and how it hurts productivity, and scheduling/delegating. 2 CPE Hours

Get Better Results with Email Marketing

Aaron Wesley Means, ACTIVATE Business Solutions (Constant Contact Trainer - NC/SC)

This session will provide a deeper look into the importance and effectiveness of why email marketing with social media engagement can drive action for your organizations. This session will review some simple but effective best practices and considerations for those seeking to make their email marketing more effective. During this session you will learn how to: (1) create compelling subject lines; (2) the best time to send emails; (3) get the most opens, clicks and shares; (4) measure results, read reports, and analytics in the system; and (5) make necessary adjustments to your marketing based on reports. 2 CPE Hours



THURSDAY

10:45 AM - 12:30 PM

(continued)

Business Model Canvas 2.0 - Using It to Achieve Goals & Enhance Collaboration between Resource Partners

Fran Scarlett, RSC Director, SBTDC

This session will showcase a leadership development program with the Business Model Canvas (BMC) at its core. This program was developed to provide practical and actionable leadership training for small and mid-sized business owners. This highly interactive seminar will follow a "train-the trainer" model where you will experience the actual leadership training while learning how to facilitate and adapt it to your needs.

Potential benefits include enhanced regional engagement, program income, access to SME clients, and expanded course offerings. 2 CPE Hours

Don't Put All Your Eggs in One Basket: Helping Clients Succeed in Special Markets

Ariana Billingsley (PTAC) and Alex Viva (IBD), SBTDC

Many counselors have heard a client utter the words "I want to sell to...". But what do we do when they want to sell to a government or a foreign customer? It is important that counselors understand the role of the SBTDC Statewide Programs (SPS) counselors, the client profile for each type of service and when to engage SPS. This session will help you understand the right questions to ask, how to distinguish clients with growth potential for these markets, help you advise clients and know when to call in the cavalry. 2 CPE Hours

Accelerating Client Revenue with the OnDemand Model

Bob Jurkowski, Founding Partner, OnDemand Advisors

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CONFERENCE AGENDA

November 15th - 17th, 2016 | Renaissance Asheville Hotel

11:00 AM - 12:45 PM

1:00 PM - 3:00 PM

3:00 PM - 3:15 PM

3:15 PM - 5:15 PM

6:00 PM - 9:00 PM

Century on the Park 20 S. Spruce St.

9:00 PM

Downtown Gathering Spot

Registration & Networking Lunch (starting at 11:30)

Plenary - Growing Relationships & Harvesting Impacts

1:00 Welcome & State of Small Business Update Scott Daugherty, Anne Shaw, Dr. James Williamson

1:30 "Farm to Fork" Showcase

Break

SBTDC / SBCN Regional Roundtable

West

Piedmont

Central

East

Joint Reception / Dinner

Hospitality





7:30 AM - 8:15 PM

Breakfast

8:30 AM - 10:30 AM

Concurrent Sessions

SBCN New Director Orientation

Overcoming Counselor Bias

Social Media Marketing Update

Assessing Progress of Mid-Size Clients

Supporting Agri-Business

10:30 AM - 10:45 AM

Break.

10:45 AM - 12:45 PM

Concurrent Sessions

SBCN CenterIC Orientation

Overcoming Client Bias

Lender Panel

Business of Beer

ProfitCents Delivery

1:00 PM - 1:45 PM

Networking Lunch

2:00 PM - 5:00 PM

Industry Focus / Tours

Beer Around Town

Asheville Renaissance

Down on the Farm

6:00 PM - 7:00 PM

Joint Networking Reception

7:00 PM - 9:00 PM

SBTDC & SBCN Awards and Recognition Dinners

9:00 PM

Hospitality



7:30 AM - 8:15 AM

8:30 AM - 10:30 AM

Concurrent Sessions

Breakfast

Rural Center / Farm Service Agency

Trusted Advisor Fieldbook Study

Create / Edit Email Marketing

Business Model Canvas 1.0

Revenue Accelerations / OnDemand Model

10:30 PM - 10:45 AM

10:45 PM - 12:45 PM

Break

Concurrent Sessions

Time Management for Professionals

Better Results - Email Marketing

Business Model Canvas 2.0

Special Markets (PTAC, IBD)

Revenue Accelerations / OnDemand Model

9:00 AM - 1:00 PM

SBTDC Statewide Advisory Board

1:00 PM

Adjourn Conference

