Business Development Training Program

Designed for Small, Women, Minority, Disadvantaged, and Emerging Business Enterprises

Unparalleled entrepreneurial training since 2005

"The BDTP has been a wonderful learning experience ranging from information on personality traits to finance... Kudos to Prism Technical and MMSD for a great program!"

Carrie Bristoll-Groll, PE, CFM, Stormwater Solutions Engineering, LLC

Sponsored by:  Managed by:

MMSD
Preserving The Environment • Improving Water Quality
Milwaukee Metropolitan Sewerage District

PRISM TECHNICAL INSTITUTE
WHAT IS THE BUSINESS DEVELOPMENT TRAINING PROGRAM?

The Milwaukee Metropolitan Sewerage District (MMSD) initiated the Business Development Training Program (a component of the Workforce Development Training and Placement Program), which is coordinated and managed by Prism Technical Institute, to build the capacity and capabilities of small, women, minority, emerging and disadvantaged enterprises in order that they may better compete for and successfully complete MMSD contracts and other construction industry projects.

In collaboration with various established businesses and mentors and through participation in customized training, assessment, coaching and mentoring, Program participants prepare and plan for business improvement, increasing the likelihood of thriving in their industries, and thereby increasing their own success and creating opportunities for others to do the same.

Small, women, minority, emerging and disadvantaged business owners and managers can enroll -- at no cost. An 8 month commitment to this enriching training/mentoring experience will yield benefits for years to come. Training is generally held in the evenings with a few on Saturday mornings. Sessions begin in late winter/early spring.

PROGRAM COMPONENTS

- Customized business development training with no "out of pocket" cost to the business owner
- Professional and business development support from mentor-protégé relationship with experienced business/individual
- Multiple networking opportunities
- Competitive grants awarded for firm development needs such as accounting services, legal work and technology upgrades
- Free web sites, marketing plans and business plans for selected participants
- Free computer software programs provided to participants who complete training

PROGRAM ELIGIBILITY CRITERIA

- One year in business, or provides a business plan
- Employs at least one employee, other than the owner
- Certified SBE, MBE, WBE, EBE, DBE by at least one Wisconsin entity
- Written commitment to participate fully, attending training classes, mentor-protégé meetings and coaching sessions
- Maximum of two individuals from the same company may participate
- MUST BE ONE OF THE FOLLOWING:
  - Business owner or operating partner
  - Operating officer or executive manager
  - Critical decision maker for the firm

Above Image: Denise Patton, Owner of BDP & Associates, examines the management style assessment completed by one of the business owners in class.
**SELECTION PROCESS**

Interested applicants must complete and submit the enrollment application by March 15th to be eligible to be included in classes beginning in Spring of that year. Not everyone will get in, as the process is competitive.

Applications will be reviewed by representatives or designees of MMSD and Prism Technical Institute. A selection of applicants may be interviewed prior to final Participant selection.

Don’t delay. Class sizes are extremely limited.

The advice I’ve gotten through the Business Development Training Program has helped us set up systems that let us keep getting better at everything we do, including a significant amount of help with Human Resources and improving our inter-office efficiencies.

Khary Penebaker, The Penebaker Enterprises

The previous ‘Training Programs’ that I mostly based on a more general, broader style of attendance to qualify the number of companies they have trained. The real difference is that the program offered by MMSD and run by Prism Technical [Institute] is a much more comprehensive program that offers substance and detail and real professionals that field questions and share answers in a neutral environment to a variety of companies with varying skill sets and business experience.

Jose Sanchez, Sanchez Paining & Decorating, Inc

The subjects and speakers on each night have been enriching and have helped broaden our knowledge of operating and maintaining a business.

Joyce and Eugene Lacy, Lacey’s Trucking

This class prepares you for the real world of contracting.

Tremayne Glass, Tremtech Audio/Video

"Participating in the ... Business Development Training Program has helped me develop into a well rounded business person; I have gained a wealth of overall business knowledge. I have also gained valuable networking skills and meaningful relationships."

Adrieane P. Johnson, Anderson & Anderson Construction, LLC

"The BDTP has enhanced my ability to be a more competitive employer, service provider and manager. The program is rich in resources and knowledge."

London Thomas, White Glove Group, Inc.
FACULTY

While instructors may change from year to year, what does not change is their industry stature and expert understanding of the subject matter being presented.

Top right half circle: Panel of financial experts discuss factoring, collateral lending, banking requirements.  Top full width Image: G. David Guerrero, Professional Engineer - teaches project management and use of Microsoft Project.  Top Circle inset: Noel Williams, CPA owner Williams CPA, discusses financial management.

Bottom left: Dave Gehrt, Vice President, Briohn Builders discusses project estimating.  Bottom Circle inset, Brian Molstad, Web design / architect, owner of Molstad Consulting teaches business owners about web analytics and the importance of a web presence.  Bottom right: Shannon Metoxen, JP Cullen, one of Wisconsin’s largest general contractors -- explains the importance of good documentation when requesting a Change Order.
SURROUND YOURSELF WITH RELEVANT EDUCATION

Participants network with one another; developing camaraderie and strong, long lasting bonds.

Human Synergistics / American Management Association techniques and materials are used by participants to assess their management styles, strengths, weaknesses and personal motivations. Building on their work in the previous sessions, participants learn to assess their manner of interacting with others (colleagues, employees, clients, etc.), learning how to best engage with others to achieve success.

Government and private sector certifying entities explain the certification process and why to get certified. Business owners are exposed to various programs -- financial and otherwise -- available to growing businesses, here in Wisconsin.

Financial Statements -- Balance Sheets, Income and Cash Flow Statements -- are analyzed and discussed. How these three simple documents are related and what they reveal even to a non-financial manager are key to running your business. Participants receive textbooks designed with the non-financial executive in mind.

Bonding and insurance are important tools for any business; but those engaged in construction and/or design functions know that beyond cash, bonding and insurance are the life blood of staying in business. Understanding how to get the bonding and insurance you need - when you need it; how to manage it; and how to maintain it at sufficient levels are key elements for growth.

MSD personnel from procurement, legal, and engineering are readily accessible and eager to help participants learn the MSD bidding and procurement process. The entire training program is designed with your success in mind.

Change orders are an integral element of construction management. Obtaining and managing them is the difference between profitability and disaster. There’s no one more qualified to teach this than our General Contracting partners.

Basic computer literacy is a must for all small business owners to succeed. Those not experienced in the use of computers will enjoy our classes crafted to bring you up to speed on: Internet browsers, Microsoft Windows, Email, and basic computer hardware and software applications. Computers are available for individual business owner use.

The Microsoft Office suite of products -- particularly Excel and Word-- are explored through an advanced level. Topics include mail merging; creating tables; charts and graphs; advanced functions and building simple estimating or cash flow projecting spreadsheets. Most business owners will find something new, regardless of their experience.

Making money isn’t easy; if it was, everyone would be in business for themselves. So, its important that small business owners learn the “seven habits of highly successful people” starting with setting priorities and proper planning.

Ethical dilemmas are commonplace for small business owners. We tackle the topic and the consequences for making inappropriate decisions, helping entrepreneurs learn how to build a foundation for longevity.

Microsoft Project is the well-regarded software program incorporated into an intense 8 hour, hands-on seminar and workshop experience during our Tier I training. Our entrepreneurs learn how to set up and manage their projects using MS project from start to finish and are rewarded with their own copy of the software at the conclusion of the software training. Follow up training is provided in the Tier II program. Participants also learn how to incorporate Microsoft Excel files into Microsoft Project.

The game of “business” is not without considerable rules and regulations. These include OSHA, unemployment, workers comp, FICA, withholding taxes, etc. Government representatives are eager to help you understand how to “stay in the game.”

Financial resources -- how to find and access them can be a challenge, but you’ll meet bank and non-traditional financing source decision makers. Topics include: underwriting, building lasting relationships, factoring, financial planning and cash flow.

Contracts, lien and employment law take center stage in an understandable discussion, when our lawyers lead the class.

Marketing, branding, communications, networking, and your web presence are important elements of your business. Let us show you how it's done.

Construction executives share their experience with estimating, project accounting and scheduling.

Eventually, you’re going to build your company with people you don’t know today. Learning how to plan for the future and hire and retain good people takes center stage in our seminar on personnel management and succession planning.

People judge you every time you speak or simply fire off an Email in anger. Effective written, verbal and nonverbal communication on and off the job site are important to sustainability. That’s why it’s a part of our training program.

Etiquette in dining and other social and business situations are discussed in a unique restaurant/classroom setting. It builds confidence and it’s a lot of fun.

Stress management and creating a work-life balance help you stay in the game.

Green initiatives and processes are introduced to our participants.

Dave Schuppler, Schuppler Associates discusses insurance and bonding with Bruce Spann of Spann & Associates.
<table>
<thead>
<tr>
<th>Course Title</th>
<th>Tier 1 Course Titles</th>
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<tbody>
<tr>
<td>What does it mean to be “GREEN”</td>
<td>Preserving Your Sanity</td>
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<tr>
<td>Impressions Count / Business Etiquette</td>
<td>Good Help Needn’t Be So Hard to Find</td>
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<tr>
<td>Legal Issues: Know Your Rights and Those Owed to Others</td>
<td>Financial Resources For Your Business</td>
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<tr>
<td>Project Management using Microsoft Project 3</td>
<td>Project Management using Microsoft Project 2</td>
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<tr>
<td>Project Management and Productivity</td>
<td>Project Management using Microsoft Project 1</td>
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<td>Computer Literacy 1</td>
<td>Advanced Computer Literacy</td>
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<tr>
<td>Computer Literacy 2</td>
<td>Keeping it all above Board</td>
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<td>Understanding the MMSD Bidding Process</td>
<td>How Not to be an Accidental Non-Profit Organization</td>
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<tr>
<td>Certification and Assistance</td>
<td>Financial Statement Basics and Understanding Yours</td>
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<tr>
<td>Welcome / Orientation</td>
<td>Managing Risk: Bonding and Insurance</td>
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<td>Self Assessment 2 Motivation and Interaction</td>
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<td>Custom Courses designed based upon individual and class needs</td>
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If you would like to use your computer to complete this application, go to: http://www.prismtechnical.com/PTI.html (Scroll down to BDTP application)

**BUSINESS DEVELOPMENT TRAINING PROGRAM**

**Enrollment Application**

<table>
<thead>
<tr>
<th><strong>Applicant Name:</strong></th>
<th>Mr. ☐ Ms. ☐ Mrs. ☐</th>
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<tbody>
<tr>
<td><strong>Company Name:</strong></td>
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<tr>
<td><strong>Title or Position:</strong></td>
<td>Year Business Started</td>
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<td><strong>Business Street Address:</strong></td>
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<td><strong>City:</strong></td>
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<td><strong>Business Telephone:</strong></td>
<td>Business Fax:</td>
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<tr>
<td><strong>Business Email Address:</strong></td>
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**How often do you check your email?**
- Several Times Per Day ☐
- Once Per Day ☐
- A Few Times Per Week ☐
- Rarely ☐

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<th><strong>Business Website:</strong></th>
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<td><strong>Residential Phone:</strong></td>
<td>Mobile Phone:</td>
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<tr>
<td><strong>Personal Email Address:</strong></td>
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</table>

**Company Sales Last Year:**
- Under $10,000 ☐
- $10K - $50K ☐
- $50K – 100K ☐
- $100K-$250K ☐
- Over $250K ☐

**Company Sales This Year:**
- Under $10,000 ☐
- $10K - $50K ☐
- $50K – 100K ☐
- $100K-$250K ☐
- Over $250K ☐

*For Recordkeeping only – Please provide Ethnicity*
- African American ☐
- American Indian ☐
- Asian ☐
- Caucasian ☐
- Hispanic ☐
- Other ☐

**Do you have a bank line of credit?**
- Yes ☐
- No ☐
- If so, how much? |

**Who does your books?**
- You? ☐
- Your Spouse? ☐
- An Employee? ☐
- Outside Accountant? ☐
- Lawyer? ☐

**Do you use accounting software?**
- Yes ☐
- No ☐
- If yes, please select the type: Excel or other spreadsheets

| Accounting Software: | QuickBooks ☐ Peachtree ☐ Microsoft ☐ Other ☐ Name |

**What’s your experience with MS Word**
- None ☐
- Have used ☐
- Often and Comfortable ☐
- Advanced user ☐

**What’s your experience with MS Excel**
- None ☐
- Have used ☐
- Often and Comfortable ☐
- Advanced user ☐

**What’s your experience with MS Project**
- None ☐
- Have used ☐
- Often and Comfortable ☐
- Advanced user ☐

**Tell us about your education:**
- Did you finish high school? Yes ☐ No ☐
- Do you have a HS Diploma or GED? Yes ☐ No ☐

**COLLEGE. (Select highest level)**
- Some ☐
- Associates Degree ☐
- BS/BA Degree ☐
- Some Grad School ☐
- Graduate Degree ☐

**TRADE (Select highest level)**
- Never had an apprenticeship ☐
- Started apprenticeship ☐
- Finished Apprenticeship ☐
- Journeyman ☐
- Master ☐

**How is your business certified?** *(Please check all that apply)*
- SBE by MMSD ☐
- MBE by WisDOC ☐
- WBE by WisDOC ☐
- MBE by WSDC ☐
- EBE by City of MKE ☐
- DBE by WisDOT or Unified System ☐
- 8a by Fed/SBA ☐
- SDB by Fed/SBA ☐

RETURN THIS 2 PAGE APPLICATION TO: LAFAYETTE CRUMP, 414.847.0992 (FAX) OR LCRUMP@PRISMTECHNICAL.COM

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REFERENCES:

(PLEASE PROVIDE A SEPARATE DOCUMENT IF YOU NEED ADDITIONAL SPACE)

<table>
<thead>
<tr>
<th>Business</th>
<th>Reference Name:</th>
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A **Company Summary** / Provide a brief synopsis of your company’s history and the type of work that your company does.

B **Construction or Construction-Related Work Experience** / List and describe 2-3 construction (or construction-related) contracts that you have completed in the past 3-5 years; also describe any work done for MMSD at any time.

C **Construction Contract Clients** / List 3-4 major current/past firms (or governmental entities) with whom you have contracted.

D **Related Professional Development and Continuing Education** / List any professional development and/or continuing education (i.e. licenses, certifications, training seminars) you have completed related to your field.

E **Skills and Talents** / Identify your professional skills and personal talents that are particularly valuable in your business.

F **Professional / Personal Development** / List personal and/or professional skills that you want to develop or improve.

G **Program Interest / Suitability** / Why you are interested in the MMSD Training and what makes you an ideal candidate?

H **Strengths / Weaknesses** / Describe your business’s strengths and weaknesses. What makes your firm better than your competitors? What is keeping your firm from becoming a greater success? What could you be doing better?