

Elevate Hennepin™

Advisor Onboarding

January 2025

Agenda

- Introductions
  --name, organization
- Elevate Hennepin Initiative & programs
- Client engagement and how they find support
- Website and intake walk through
- Client communication
- Referrals
- Work orders & invoicing
- Feedback and data collection
- Do's and don'ts
- Q&A

Your Elevate Hennepin Team

- Lily Shaw – Economic Development Manager
- Ixchel McKinnie –Advisor Network Project Manager
- Amran Nur – Business Resource Coordinator (website / forms / data)
- Jessica Anderson – Business Navigation / invoices / outreach
- Brandon Bell – Cohort Programs
- Frances Huntley – Cohort program support

NOTE: for 1:1 advising please copy Ixchel, Jessica, Amran and Lily on all emails

Elevate Hennepin Initiative

- Hub of resources – Elevatehennepin.org
- Peer to peer learning opportunities
  - CEO Start (CO.STARTER curriculum / local facilitators)
  - CEO Start Bootcamp (CO.STARTER curriculum / local facilitators)
  - CEO Now (Interise curriculum / local facilitators)
  - CEO Next (Edward Lowe foundation research / MB Mentors facilitators)
  - HR Next (Simon Says HR curriculum / facilitation)
  - Certified Access (certification training)
  - The Coven Digital Membership
- One-on-one advisor network – 34 Advisors in 10 Areas of support


ELEVATE Hennepin™
Second stage
(10-99 employees)
CEO Next™
Established
Early growth
(1-9 employees)
CERTIFIED ACCESS
ELEVATE HENNEPIN TALENT
Early stage
CEO Now™
Startup
CEO Start™
Emerging
Idea
CEO Start™ Bootcamp
Hennepin

Client Engagement

How clients find us

- Word of Mouth
- Online searches
- Website: ElevateHennepin.org
- Entrepreneurial ecosystem
- City partners
- Business advisors
- Business navigation
- Outreach events
- Newsletter, Social Media, and other Hennepin County efforts

Website Engagement

- Resource Cards
- "Schedule a Consultation" intake form
- Connect with a Business Navigator

Business Navigation

Business Navigation Experience

- 10-15 minutes
- Idea or existing business
- Review areas of support
- Refer advisors based on area of support selected and needs
- Make other ecosystem referrals as needed

Areas of Support

- Access to Capital
- Accounting
- Business Certification
- Business Strategy
- Financial Management
- Human Resource
- Idea Stage
- Legal
- Marketing
- Technology

Idea Stage Support

- 15 hours of support vs. 25 hours
- For non-registered or pivoting business
- Coaching to refine the business idea
- Guidance through completing a business lean canvas
- Equip client to evaluate the viability of their business idea
- Refer to other advisors as appropriate

Communications & Referrals

Client communication requirements

- Introduction email within 48 hours w/scheduling process
- Confirm location and registration with secretary of state
- Initial intake meeting to determining fit & agreed scope
- Ensure client has completed the Elevate intake form
- Ensure client understands Elevate Hennepin and the no-cost element
- End of service email w/outcomes survey

Client communication recommendations

- Reminder emails 24 hours before meetings
- Scope of service email after initial meeting to get sign off and agreement
- Updates at 10, 15, 20 hours so client understands deliverables and outcomes

Referrals

- Referring advisor completes form
- Receiving advisor initiates contact with client within 48 hours
- Clients must complete the intake form for each advisor (not required until invoicing)

Work orders & invoicing

Overview of Work orders

- Not to-exceed amount is per work order
- Date range per workorder (quarterly or semi-annual, unless otherwise discussed)
- Workorders will continue to be allocated based off demand, performance, and feedback
- Workorders can be distributed at any time with the following considerations:

--- previous workorders are than null and void or out of funds

--- workorders are proactive vs reactive

--- legitimate demand and legitimate need

Monitoring Work orders

- Track pipeline – hours needed to completed projects for each client
- Monitor billing and work orders to determine ability to take on new clients
- Inform EH team when approaching end of work order funds available

Invoicing

- Complete monthly or quarterly – but consistent
- Provide all data/information requested & sign accordingly
- Submit on time to ensure you receive your full $375 quarterly admin payment
- Submit on time to ensure proper workorder fund allocation

Data collection sources & acknowledgement

- Fully completed intake help us track business owner, business specifics, support needs, and demographics
- Fully completed invoice helps us track outcomes, job creation, funds secured, deliverables, and hours
- Satisfaction survey helps us track performance and outcomes
- Semi-annual survey helps us track ongoing growth and additional needs
- Encourage completion of surveys

Acknowledgements

- Protect you as an advisor, the client, and Hennepin County
- Ask client to acknowledge personal responsibility for the business
- Inform clients about how data will be shared and associated data privacy rights under state law
- Inform clients they will be added to the Elevate Hennepin newsletter
- requires clients to agree to provide feedback via surveys

Data collection expectations & support

- Ensure client completes intake form before conclusion of scope of work
  --- recommended to be completed before scope of work starts
- Fully completed invoices
- Share satisfaction survey OR support EH Staff with distribution of quarterly satisfaction survey
- Support EH Staff with the distribution of the semi-annual survey
- Encourage client's completion of surveys
- Ensure clients fully understand Hennepin Counties investment for ongoing support

Don't

- Don't promote fee services or programs
- Don't say you are at capacity or out of money – tell EH staff instead
- Don't assume someone is from Hennepin County, please check
- Don't assume all projects are 25 hrs.
- Don't assume additional hours will be approved
- Don't bill for intake w/client
- Don't expend time on unresponsive clients
- Don't charge for no shows
- Don't assume a client knows about EH
- Don't refer verbally, complete the form
- Don't create your own Elevate Hennepin flyers
  or materials
- Don't misrepresent the brand or the program
- Don't charge any fees to client I work exceeds 25 hours

Dos

- Do offer other ecosystem resources or refer to a business navigator if you don't know
- Do suggest other advisors as a resource
- Do ask and check Secretary of State registration
- Do meet with EH staff if extra hours are needed
- Do set expectations of clients e.g. timely responses and turn around on needs to complete deliverables
- Do use Elevate Hennepin Brand Guidelines
- Do have client complete the intake to ensure online certification and acknowledgement is agreed upon
- Do promote Elevate Hennepin on your website and on social
- Do track your hours and your workorder NTE
- Do communicate with EH Staff where you are in your expenditures
- Do share success stories with EH team
- Do join monthly meetings
- Do invoice on a timely manner

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Next Steps

- Updated advisor materials will be sent over the two weeks:
  --- Branding Guide
  --- contact sheet
  --- referral form
  --- survey form
  --- updated invoice form
  --- other materials as needed
- Advisors to add updated links and Elevate Hennepin logo to website or social – please send for review by EH Staff
- Training of new advisors on 1/17
- In person networking for all advisors 2/20

Questions & Answers