



New Advisor Onboarding

January 17, 2025



Agenda

- Overview of Elevate Hennepin
- Areas of support
- Client experience
- Business Navigation
- Invoicing
- Feedback and data collection
- Marketing & promotion
- Expectations
- Q&A

Nothing shared in this presentation supersedes the terms of your contract. The terms of your HCHRA contract apply and shall control.

Icebreaker

- Name
- Organization
- Unique or best in class offering

New advisors

Advisor	Area(s) of support
Antonelli & Associates	Business strategy
Dendros Group	Business strategy, idea stage
Digital Synergy	Marketing
Field Guide, Inc.	Marketing
Hack the Gap	Technology
MniSota Fund	Business strategy, idea stage
Monicat Data	Marketing
Simon & Associates	Human resources
Software for Good	Technology
TruLegal	Legal
Small Business Dreambuilders	Accounting
Whip-Smart	Marketing

OVERVIEW

Elevate Hennepin objectives

Building a thriving, inclusive economy starts with supporting entrepreneurs, small businesses, and growing companies to create jobs, foster innovation, and provide access to resources that communities need to thrive.

Supporting businesses is critical to creating opportunities and making communities places where people want to live, work, and invest.

By advancing economic opportunity and supporting businesses that provide resources to local communities, we support the well-being of individuals, increase community resiliency, and advance climate action by reducing reliance on personal transportation.

Elevate Hennepin city partners

Elevate Hennepin is led by Hennepin County for Hennepin County businesses, in collaboration with 19 partner cities:



**see more details on About Us at elevatehennepin.org*

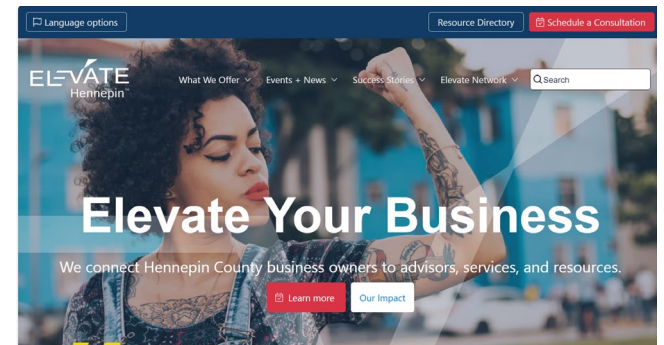




*Venessa Drews, Cheesecake Funk - Minnetonka
Elevate Hennepin advisee*

Elevate Hennepin

- **Curated hub**
 - Small business events
 - Services and resources
 - Lending pathways
 - Content connection
- **Group Learning**
 - CEO Start
 - CEO Start Bootcamp
 - CEO Now
 - CEO Next
 - HR Next
 - Get Started
 - Certified Access
 - Round Tables
- **One-on-one business advising**
- **Business Navigation**



Established

Second stage
(10-99 employees)

CEO  **Next™**

Early stage
Early growth
(1-9 employees)

HR  **Next**



**CERTIFIED
ACCESS**

Startup

CEO  **Now™**

CEO  **Start™**

Emerging

CEO  **Start™**
Bootcamp

Idea

Impact (2020 Q4 – 2024 Q3)

**End of year results will be shared after February 15, 2025*

3,111

businesses
served through
Elevate
Hennepin™

39,209

hours of
consulting
services
provided

13

average hours
of service per
client

37

Hennepin
cities
represented

Financing results (2022 – 2024 Q3)



Financing

\$31.7 million

150 businesses

67%

Financing to entrepreneurs of color

45%

Financing to women entrepreneurs



Jobs

672 jobs

147 businesses

81%

Jobs at businesses by entrepreneurs of color

32%

Jobs at businesses by women entrepreneurs



Businesses Launched

203

71%

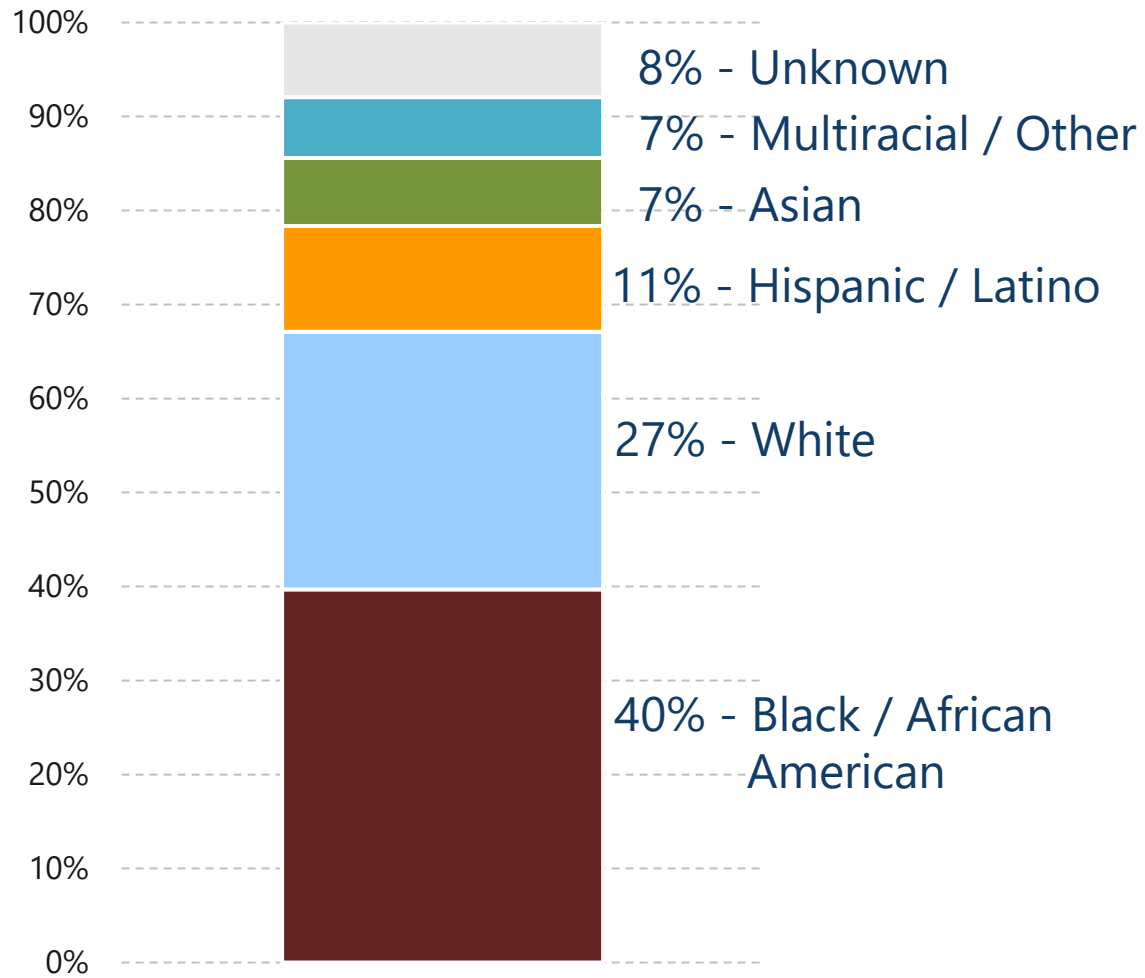
Started by entrepreneurs of color

63%

Started by women entrepreneurs

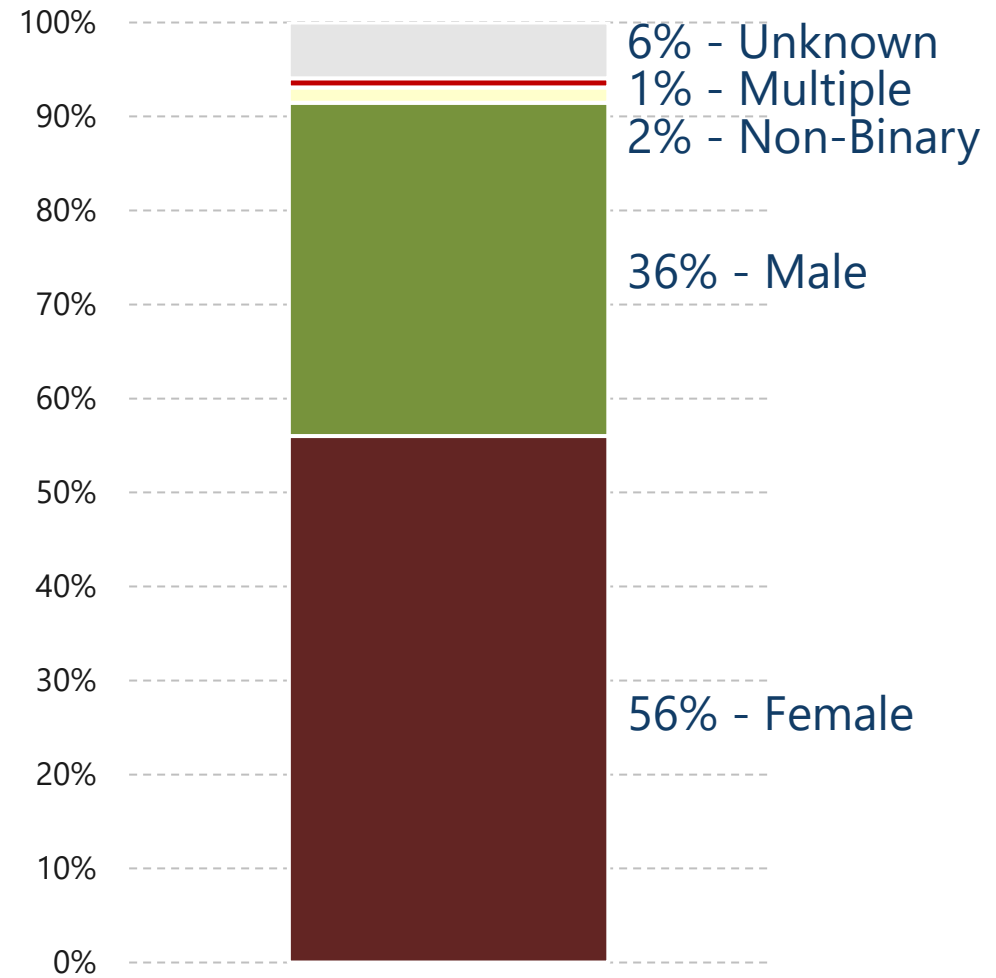
Demographic characteristics (2023 – 2024 Q3)

Race / Ethnicity of Business Owner



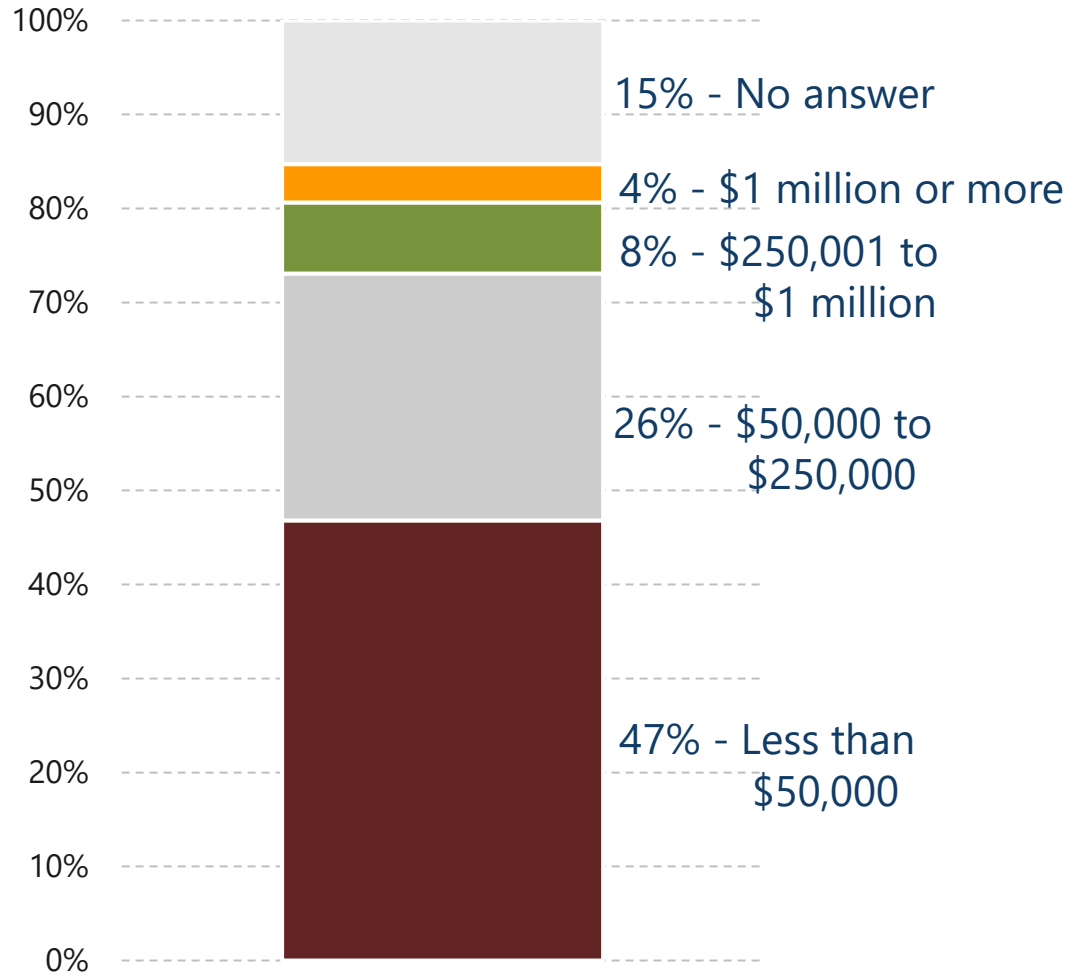
Total = 1,839 businesses

Gender of Business Owner

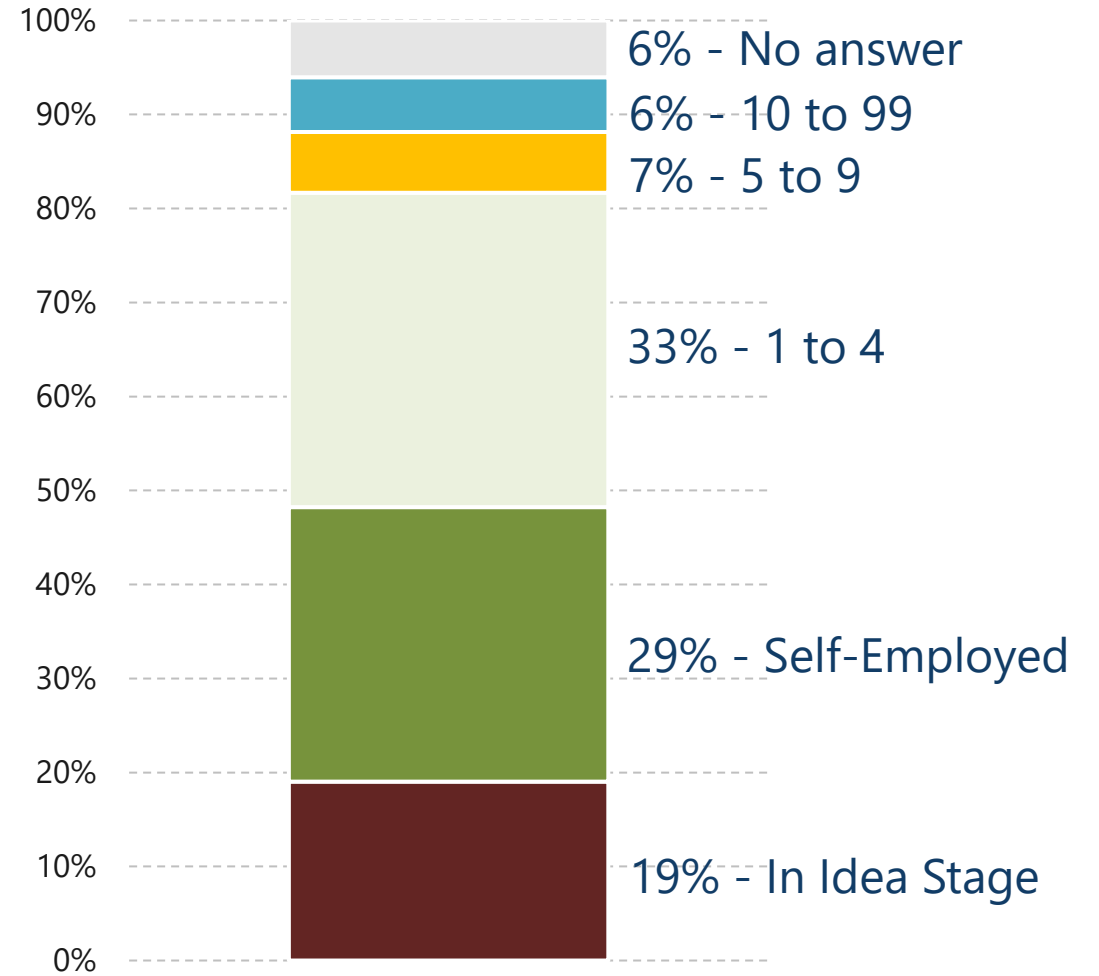


Business characteristics (2023 – 2024 Q3)

Business Size - Gross Sales



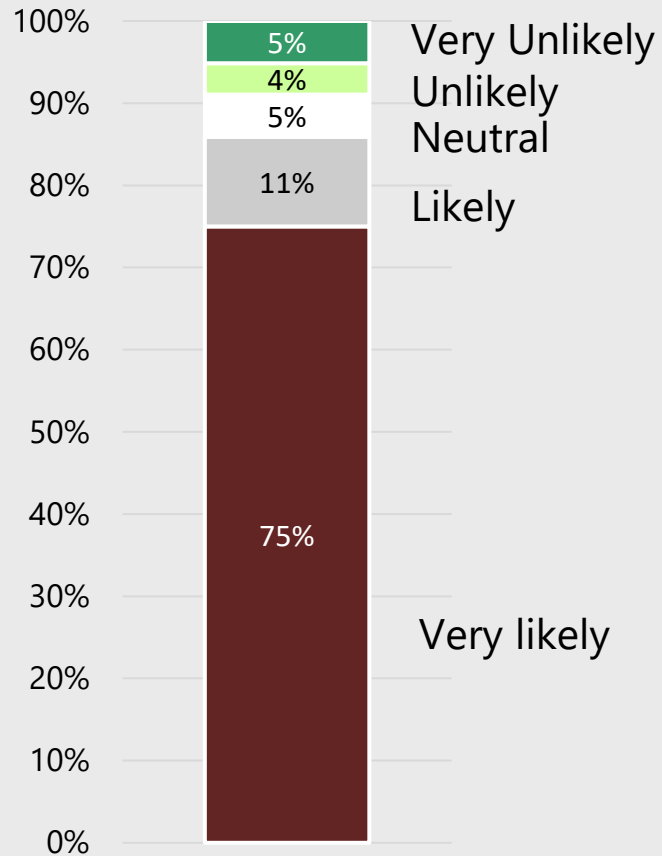
Business Size - Employees



Total = 1,839 businesses

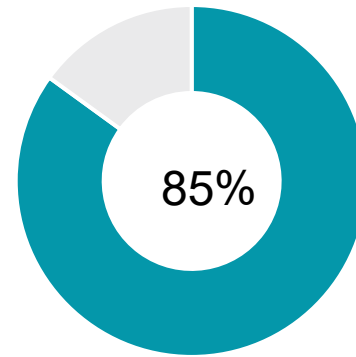
Strategy: Provide high quality service to businesses

Likelihood to recommend advisor to another business?

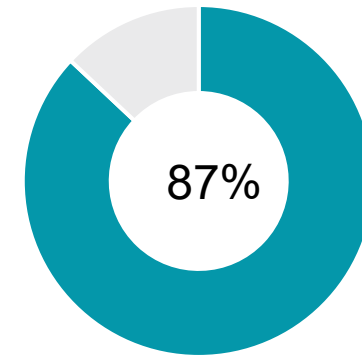


Percent of Elevate Hennepin clients saying their advisor...

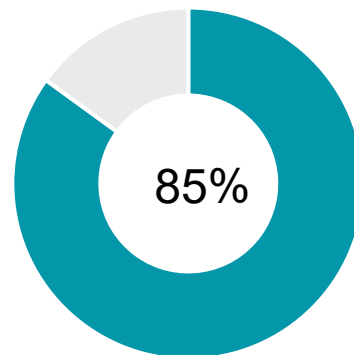
Helped me take steps toward business goals



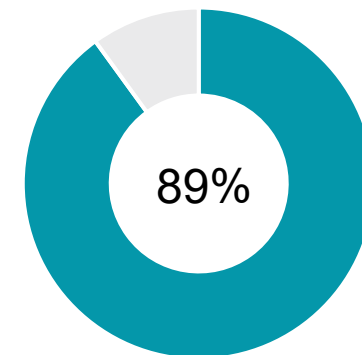
Communicated with me in a timely manner



Provided me with tools I could apply to business



Took steps to understand my needs



Elevate Hennepin's 2025 Advisor Network



"It is not an exaggeration that Elevate Hennepin advising is changing lives!" Kathy Hanson, Backpacket Strategy

Elevate Hennepin, provided by Hennepin County, offers no-cost consulting from local experts in these areas:

- Access to capital
- Accounting
- Business strategy
- Certification
- Financial management
- Human resources
- Idea stage businesses
- Legal
- Marketing
- Technology





2025 Advisor Network

Hennepin County contracts with 40 Business Advisors to provide cohort learning opportunities, professional consulting services, and 1:1 business advising – all at no-cost to local businesses.

- A&M Associates
- Antonelli
- Backpack Strategy
- Better Business Bureau
- Certified Access
- Clear Talk Accounting
- ConnectUp!
- Co-Starters
- Davis Law Office
- Dendros Group
- Digital Synergy
- Edward Lowe Foundation
- Enviro-Tech
- Field Guide Inc.
- Hack the Gap
- Hortensia Law Office
- IFRI, LLC
- Impact Hub
- Interise
- JLLB Media
- Khoo Consulting
- Latino Economic Development Center
- Led by Truth
- LegalCORPS
- MniSota Fund
- Monica Data
- MBMentors
- New Publica
- NextStage
- Sigma Consulting
- Simon Says Lead
- Small Business Dreambuilders
- Software for Good
- Springboard for the Arts
- Technologist Computers
- The Coven
- Victor Jones Consulting
- Whip-Smart
- Women Venture



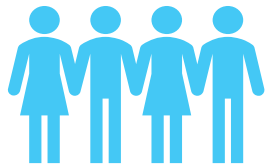
Junita's Jar

"We continue to grow because Hennepin County's Elevate Hennepin program believes in entrepreneurs like myself and allocates funds to support us, lift us, and raise us so we grow this vibrant economy."

*Junita Flowers, Junita's Jar – Brooklyn Park
Elevate Hennepin advisee*



Elevate Hennepin Advisors



Foster a **diverse and inclusive** support network



Communicate with businesses throughout Hennepin County



Connect emerging entrepreneurs to business resources in Hennepin County



Offer **current and critical expertise, tactical and practical** problem-solving, while providing learning opportunities



Create and strengthen **peer networks** within the business community

Eligibility for Elevate Hennepin Advising

- Established businesses located in Hennepin County
- Preference is 50 employees or fewer, limited by contract up to 100
- Established business must be registered with the State of Minnesota
- Idea stage client must reside in Hennepin County
- Location and state registration is verified by advisor:
 - [Property Information Search | Hennepin County](#)
 - [Search Business Filings](#)
- We offer limited support for non-profits
 - At least one W2 employee
 - Established for at least a year

**see more details on FAQ under Elevate Network at elevatehennepin.org*

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

The Process

- Entry points – word of mouth, advisor, website, or navigator
- Client selects an advisor and completes intake/consultation form
- Advisor communication within 48 hours
- Eligibility verified by advisor
- Agree upon a project or scope of work including outcomes
- Begin work – up to 25 hours per advisor
- Communicate hours used/remaining
- Completed engagement with communication of final outcomes
- Invoice quarterly or monthly
- Help with survey data collection



BUSINESS NAVIGATION



Business Navigation

- 1/3 of clients start with a Business Navigator
- 10 minutes overview of Elevate Hennepin and area of support
- 1-4 advisor options with resource card links
- Unique URL to make it easier to select an advisor

Business Navigation Email

Hi Xxx,

Thank you for reaching out to us and for your interest in Elevate Hennepin! Elevate Hennepin is your hub for no-cost business consulting, events, and hundreds of resources for your business or idea.

Based on your business goals, I put together a list of professional advisors. Each advisor listed below can provide up to 25 hours of professional consulting at no cost to you, provided by Hennepin County. Click on the links below to learn more about their services.

· [Sigma Consulting | Elevate Hennepin](#)

· [ConnectUP! Institute | Elevate Hennepin](#)

· [Backpocket Strategy | Elevate Hennepin](#)

· [WomenVenture | Elevate Hennepin](#)

Once you have decided on an advisor, follow these three simple steps to get to work:

1. Click on the red "**Schedule a Consultation**" button.
2. Answer a few questions about you and your business.
3. Select the advisor you have chosen from the list.
4. Submit the form.

You will receive an email within 48 hours from your chosen advisor about your first meeting.

You are encouraged to keep exploring the many resources in the [Elevate Hennepin resource directory](#). There, you can use the filters on the left side of the screen to search between specialty service areas, depending on your specific business needs.

Also, [sign up for our newsletter](#) to see stories of business owners like you, great events, and resources to help you grow your business.



INTAKE FORM



Certifications and acknowledgments

- Protects Hennepin County, advisor, and client
- Asks client to acknowledge personal responsibility for business
- Informs client about how data will be shared and associated data privacy rights under state law
- Informs them they will be added to the Elevate newsletter
- Client agrees to provide feedback via surveys

Best practices

- Walk your clients through acknowledgements verbally
- May be incorporated into existing CRM and paperwork.
 - If you choose this option, you must provide documentation that it has been implemented within the organization, and you are responsible for maintaining records for six years.
- A copy will be sent with your invoice template



ADVISOR CLIENT INTERACTION



Right fit for client

- **Know your strengths and value proposition**

Let us know nuances so we can recommend appropriately

- **Refer and collaborate**

Get to know the network and refer to other advisors and resources

Refer business owners back to our business navigator if needed

- **Educate**

Show clients Elevate Hennepin website and let them know hours are at no cost

Let client know about other resources

Let them know they will be placed on our newsletter list

Communication

- **Respond within 48 hours**

Response must provide pathway for scheduling meeting, NOT a holding place until you can get to them

Initial meeting within 2 weeks or less

- **Know what you can provide within 25 hours**

Provide expectations of client to meet the project scope goals

- **Communicate capacity to Elevate Hennepin staff**
- **Make complete handoffs when referring**

Defined Scope of Services

- Initial project scope completed within 48 hours
- Contracts allow for up to 3 hours of general business advice outside of contract services
- Additional hours request must be discussed with Elevate Hennepin county staff

Eligible in scope activities

- General advising services on items that get business owners to next step
- You may consult and work with them on specific projects such as:
 - Creating a business plan
 - Creating a marketing strategy or logo
 - Helping them set up necessary software or technology systems
 - Creating HR handbooks
- Review bulleted scope of services listed in your contract
- Focus on building capacity of business owner to:
 - Understand processes
 - Develop skills and strategy
 - Implement tools that will stabilize and strengthen

Out of scope activities

- Real estate development companies or projects
 - Income primarily derived from real estate, property management & property transactions
- Services for relatives, family members, or other advisors
- Activities for your own business
- Any services that may result in a perceived or real conflict of interest
- Complex and large projects, requiring more than 25 hours of service unless approved
- Ongoing, day-to-day business operations or fractional support
- Preparing taxes, website ongoing maintenance, ongoing equipment maintenance

Conflicts of interest

- Promotion of fee for service work (i.e. "selling")
- Referring client to paid activities within your organization (classes, etc.)
- Lobbying and advocacy activities
- Service to relatives and family members

Review your contract carefully and ask questions!

INVOICING

Invoicing includes

- Payment for services provided and contracted for
- Confirmation of Hennepin County location
- Collection of outcomes per business owner
- Collection of hours provided per business

Invoicing deadlines & steps

- Quarterly or monthly
- Deadlines are enforced
- Submit on the last day of the quarter OR submit on the last day of the month
- Email invoice to Ixchel McKinnie and cc: Jessica Anderson, Amran Nur, Lily Shaw
- Staff will check for accuracy and if the business owner has completed intake form
- Invoices will be returned if there are inaccuracies or questions

Invoicing materials and payment

- Data outcomes spreadsheet will be provided and unique to each advisor
- Advisor organization invoice – HC Staff will supply details on what should be included in invoice, no signature will be required
- Payment is made within 35 business days of accurately submitted invoice, however, we work to submit payments quickly
- **Checks are mailed** unless you sign up for ACH
- **Sign up for ACH** by completing [this form](#).
 - Email Simran.Aryal@hennepin.us to let her know!

Invoicing tips

- Don't wait until the end of the quarter
- Data is emailed to you by the system and in a weekly roundup
 - Use it to populate required fields in your business owner form
- Complete all information requested
- Outcomes are essential and should focus on how the client was able to implement your services and make a change in business
- First invoice due on January 31 OR March 31
- Templates will be sent out by January 24th



DATA COLLECTION AND MARKETING



Surveys and data requests

- Satisfaction surveys (currently quarterly, but may change to at conclusion of scope of work)
- Annual surveys (1 to 5 years) to collect potential growth
- Outcomes include but are not limited to: new businesses launched, jobs created, and funding secured
- Assist with helping business owner understand the importance and that Hennepin County Elevate Hennepin may be reaching out

Branding

- Use Elevate Hennepin brand standards
- Always send to Elevate Hennepin staff for review and approval
- We make it easy! We provide communications tools you can use to promote your services and Elevate Hennepin:
 - [Communications Toolkits \(hennepin.us\)](https://www.hennepin.us/communications-toolkits)
 - Guidelines, and can be tailored to meet your needs

Not sure? Contact us!

Share with your network

- Add the Elevate Hennepin logo, unique intake link, or suggested copy from toolkit, on your website or social channels
- Carry “Elevate Hennepin” business cards and table tents to events and presentations
- Share on social and newsletters using our [Communications Toolkits](#) (hennepin.us)

Stay in touch

- Share free events and opportunities offered through your organization
 - HC newsletter has over 10,500 subscribers
 - We will post on the Elevate Hennepin events page
 - We will like or re-share social posts from your channel if you email us a link
 - We will be doing advisor profiles and success stories for newsletter
 - Share business success stories with us so we can share or do a story on the support you have provided

Other opportunities

- Talk to business groups
- Participant on a panel
- Participate in office hours
- Small Business Center - Brooklyn Park
- Welcome Wednesdays - Bloomington
- City presentations or gatherings

WRAP UP AND NEXT STEPS

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, including DBA's
- Do meet with Elevate 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 funds
- Do communicate with Elevate Staff where you are in your expenditures
- Do share success stories with Elevate team
- Do join monthly meetings
- Do invoice on a timely manner

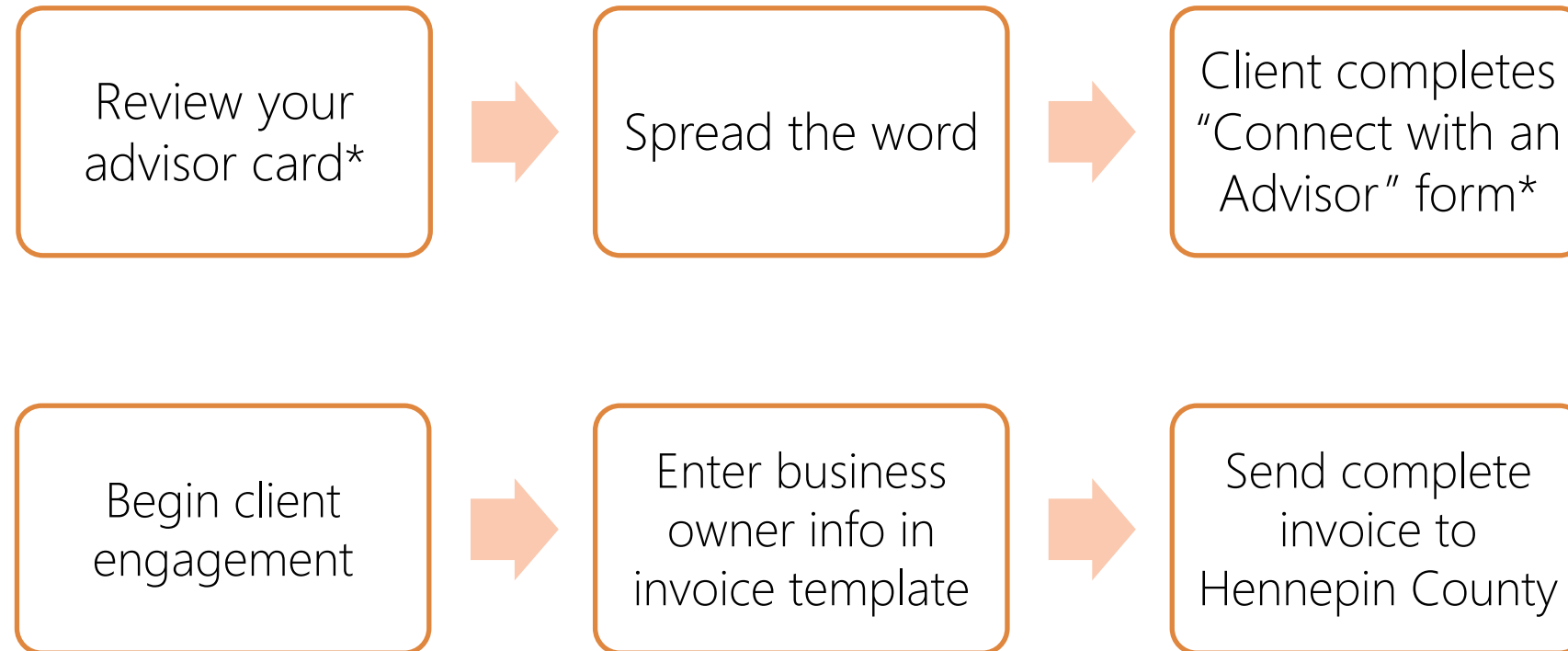
Don'ts

- 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 Elevate
- 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 if work exceeds 25 hours

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
- In person networking for all advisors 2/20

Let's get started!



*Advisor cards are located under "Resources" on www.elevatehennepin.org

*Schedule a consultation form is located on your advisor card

Elevate Hennepin staff contact list

Hennepin County Housing and Economic Development Department
Business Support staff

Lily Shaw, Economic Development Manager – lily.shaw@hennepin.us

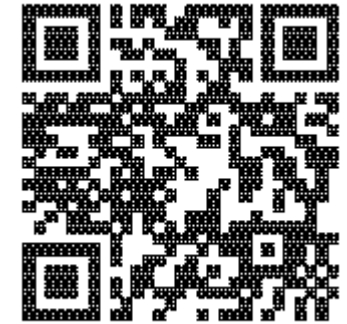
Ixchel McKinnie – 1:1 Advising Program Manager –
Ixchel.mckinnnie@hennepin.us

Jessica Anderson – Business Navigator – jessica.anderson@hennepin.us

Amran Nur – Business Resource Hub Coordinator – amran.nur@hennepin.us

Brandon Bell – Group Learning Program Manager –
brandon.bell@hennepin.us

Frances Huntley – Program Support – frances.huntley@hennepin.us



Visit www.elevatehennepin.org

Explore our [resource directory](#)

Connect with a [business navigator](#)

Sign up for our [newsletter](#)

Contact us at elevate@hennepin.us



QUESTIONS / COMMENTS