


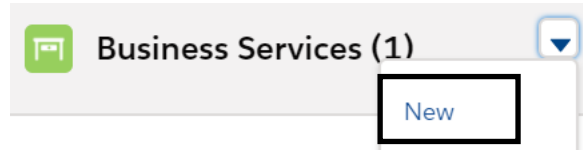


Adding a Business Service

As clients and businesses are added to Salesforce, you need to record all the assistance and services provided to them.

Add a Business Service

1. Go to the Client page.
2. Click on  next to Business Service in the right side bar and select New.



3. The client field will be automatically populated, so search for the business name. The required fields are **Business Services**, **Business Service Status**, and **Plan Developed** but you will need to enter more data in order for the business service to appear on your Dashboard. Enter all applicable information:

The screenshot shows the Salesforce interface for a Business Service record. At the top, the record is identified as 'Business Service BP-18323' with 'Edit', 'Delete', and 'Clone' buttons. Below this, there are two tabs: 'Related' and 'Details', with 'Details' selected. The 'Details' section contains a table of fields:

Business Service ID BP-18323	Business Service Status Completed
Business Aquamarine Pools	Plan Developed: <i>i</i> WITH BSC Staff Assistance
Client Rouben Petrosian	Date Service Provided 11/12/2019
Business Services Tax consulting	Date Completed <i>i</i> 12/9/2019

Below the table is a section for 'Additional Information' which is expanded to show a 'Case Note' containing the following text:

11/12/19 Hamed received the papers from IRS regarding the last year's taxes and came into our office to get help and look into them. The IRS document was regarding his 2018 taxes and was not related to his business in any way, so I gave him a couple of CPA contracts. I discussed his issue with a PARS representative who offers assistance with taxes for free, so I referred him to her to resolve this issue. 11/15/19 I met with Hamed and the PARS to discuss his issue with taxes. He was offered and received free professional help with his tax problems. Also, we planned to meet with him next week to process the paperwork for his business. 12/9/19 When Hamed came to our office to process the paperwork for his business, he met our other client - CPA. Hamed asked for a professional opinion of the CPA. CPA was happy to help, and he confirmed that the steps we've taken to resolve the issue with taxes for the year 2018 were correct

- a. **Business Service Status** Keeps track of the status of the business service being provided. This service will only be counted on the Dashboard once the status is changed to “Completed.”
- b. **Plan Developed** Select who is providing the business service from the following dropdown options:
WITH BSC Staff Assistance: Select if the service was provided by BSC staff.
WITH BSC's Consultant Assistance: Select if the service was provided by your agency's contracted consultant.
WITH BSC's Partner Assistance: Select if the service was provided by your agency's community and/or business partner.
WITHOUT BSC Program Assistance: Select if the client completed the service prior to or without BSC assistance, but you want to record they received it.

Please note: All three “WITH” options will be counted on your dashboard for business services once marked as “Completed” in the status section.

- c. **Business Services** Enter the business service provided to the client. Current types of Business Services:

General Business Services

- **Needs Assessment** Identify services and interventions appropriate for the stage and needs of that specific business. Services will be tailored to the needs of the business to achieve optimum outcomes.
- **SWOT Analysis** Teach the strategic planning method structured on four elements of concern - strengths, weaknesses, opportunities, and threats.
- **Business Plan/Executive Summary** Assistance in preparing or updating a business plan that identifies and analyzes economic, technical, and financial feasibility.
- **Business Planning** Discuss the legal and tax benefits as well as drawbacks to different legal structures. Assist start-ups with basics such as market identification, market entry, breakeven budget, and market pricing data
- **Business Compliance Requirements** Assistance with compliance with business regulatory requirements. Provide technical assistance to comply with new regulations necessary for the continuation of the business.
- **Marketing/Social Media** Support with building business brand and providing social media tools to market and promote the business. Introduction to social media platforms customers use every day like Facebook and Instagram and selling products on online marketplaces like Amazon, Facebook and Instagram Market and eBay.
- **Market assessment** Assist with creating a comprehensive analysis of environment forces, market trends, entry barriers, competition, risks, opportunities and the company's resources and constraints using tools such as Census Business Builder.

- **Marketing Plan Development** Help develop a well-crafted, strategic marketing plan by setting marketing goals, conduct a marketing audit, conduct market research, analyze the research, identify a target audience, determine a budget, develop specific marketing strategies, develop an implementation schedule for the strategies, and create an evaluation process.
- **Permits/Licenses** Assistance to ensure that proper local, state, and federal business registration processes, permits, licenses, Fictitious Business Name, and certifications are obtained to operate a business legally in the City.
- **Mentorship/Collab Set-up** Help build collaborations between clients. One approach is for seasoned clients to mentor other clients whenever possible.
- **Business Tax Preparation Support** Help business owners prepare for their federal, state, and local taxes such as gathering all the required documentation and reviewing
- **Tax Consulting** Help business owners understand their federal, state, and local tax requirements. Identify tax incentives and rebates for the client's business
- **Disaster Resiliency** Building the capacity of businesses — both to prepare for and recover from emergency, events, and build long-term financial security. Including earthquake and fire preparedness plans, appropriate and adequate insurance, etc.
- **Legal considerations** Share information on free legal workshops and pro bono clinics
- **Lease negotiation assistance** Assistance with Commercial Office and Retail Lease Negotiation, Commercial Lease Counseling, or other lease related services.
- **Site-finding assistance** Help start-ups or home businesses find a location or assist existing businesses look for new locations to expand or move including developing a cost analysis based on the targeted leases and determine the best opportunity.
- **Certification** Go over the benefits of certification and which certifies the client qualifies for. Assist with gathering all the required documents and help with the various
- **Procurement** Provide training on the procurement process for contractual opportunities with the City and other government entities including navigation and enrollment on the Los Angeles Business Virtual Network (LABAVN) system.
- **Franchise Development Planning** Help develop a franchise strategy and business plan, guide the client with any necessary market research, competitive benchmarking, gap analysis or financial modeling.
- **Succession Planning** Assist with an evaluation of the business, identification of key positions in the organization and potential successors as well as any necessary training and support planning. In addition, help the client plan and develop talent pipelines for the future.

Financial Services

- **Financial Analysis** Assist Clients with an assessment of the viability, stability, and profitability of a business to ensure increased profitability.
- **Projections Preparation** Forecast future revenue and expenses to help you pitch to potential investors, for inclusion in your business plan or for other funding opportunities.
- **Credit Report Review** Provide training on how to read personal and business credit reports. Review payment history with the client to investigate low scores.
- **Business Accounting/Budgeting** Analyze the client's business accounting procedures and financial condition for areas of improvement. Suggest optimal bookkeeping procedures and standards that ensure proper financial management and legal compliance for the client's business.

Access to Capital

- **Loan Prep Assistance** Provide free loan packaging services including reviewing the project feasibility to obtain funding to start, expand, or purchase a business. Discussing potential local/state/federal programs available to fund the business including eligibility requirements. Preparing loan applications tailored to meet specific program requirements from the information provided by the client. Connecting the client to Lenders and help answer questions about the process.
- **Cash Flow Management** Track and analyze a business's cash flow to determine the liquidity and solvency of the business: cash flow from operating activities, cash flow from investing activities and cash flow from financing activities. Providers should also have the skills to conduct liquidity and profitability ratio analysis, assess the impact that changes in costs have on financial statements, and understand how these relate to a company's financial targets.

Technology

- **Cybersecurity** Show common practice prevention methods against Cyber Security threats such as hacking, malware, and phishing.
- **Website Optimization** Use tools and software like Google Analytics, advanced strategies, and experiments to improve the performance of clients' websites, to further drive more traffic, increase conversions, and grow revenue. One of the most critical aspects of website optimization is search engine optimization (SEO) to improve the quality and quantity of website traffic to their website from search engines
- **Website Development and Management** Work with partners for website development and creation for businesses without an online presence. Conduct e-commerce audits of existing websites to identify opportunities for improvement. Improve business websites by connecting small businesses to create and design services including photographers, web designers, among others.

Please note, the following business services were added just for Sidewalk Vending:

- Sidewalk Vending - BTRC
- Sidewalk Vending - Seller's Permit
- Sidewalk Vending - Public Health Permit
- Sidewalk Vending - Plan Check
- Sidewalk Vending - Cart Inspection
- Sidewalk Vending - StreetsLA Merch Permit
- Sidewalk Vending - StreetsLA Food Permit

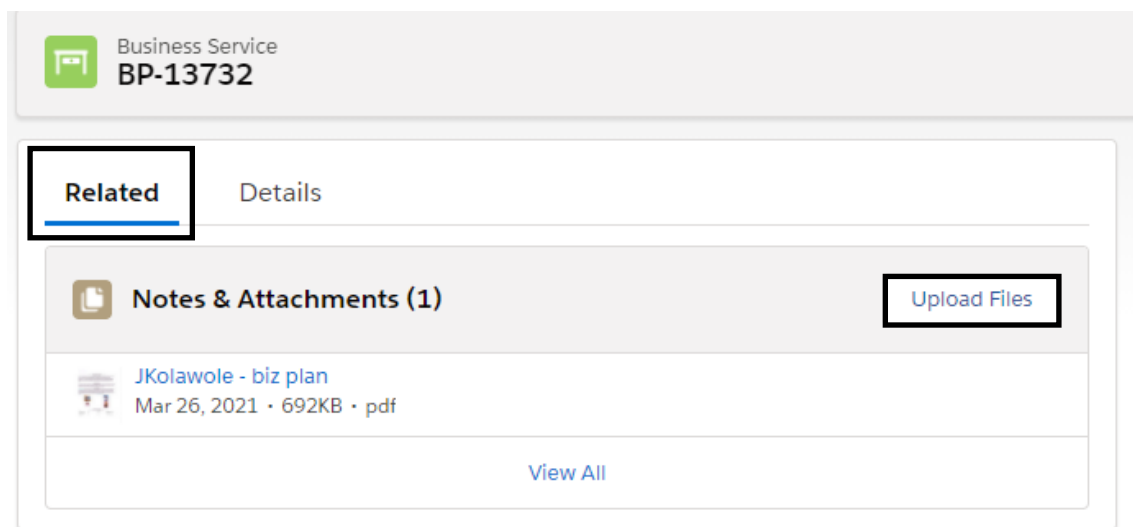
- d. **Case Note** Add details about the business service provided. Case notes need to be clear, concise, and objective. Provide accurate details of the service provided and what occurred (who, what, where, when, why, and how). Include discussions related to the service goal, action steps, timelines, strengths and barriers.

If you start working with a client setting up their social media platforms or completing a business plan and they do not complete the task in a single sitting, then leave the status as In Development and leave the Date Completed blank. You can come back to the same service and update the case note whenever you follow-up with the client. Once the service goal is complete then change the status to Complete and enter the date the service was complete.

Best Practice Tip

If you provided services to a client face-to-face, over the phone, or on a conference call. Email the client going over what was discussed and next steps. You can then attach this email to the service you just entered.

- e. **Notes & Attachments** Attach any emails or related documents (Needs Assessment, Market Assessment, Profitability Assessments, Debt Management Schedules, Business Plans, Marketing Strategies, etc.) by clicking on the Related tab and uploading the file.

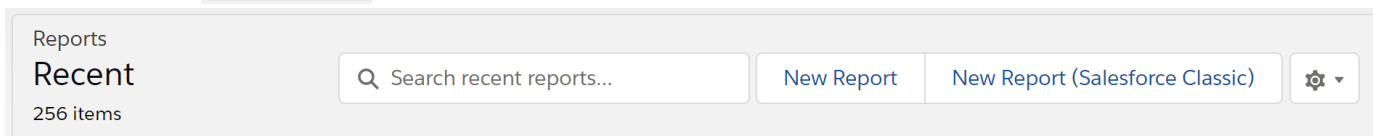


Run a Case Note report

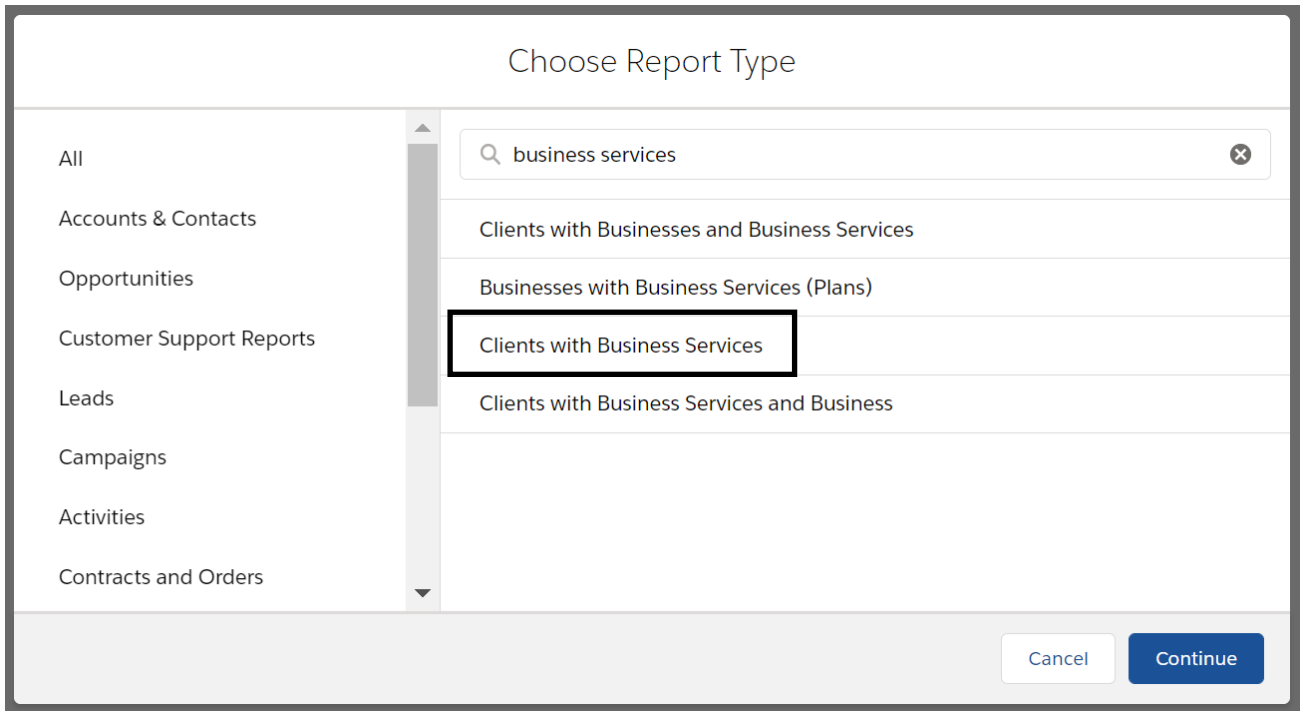
You can pull a report listing all the case notes to either get a chronicle log of services provided to the client.

1. Click on Reports in the App Navigation.

2. Click on [New Report](#)



- Under Accounts & Contacts, select Clients with Business Services and then click Continue. We select this Report Type since we add the business service on the Client page. Please note, if you add everything on the business page then you should select Businesses with Business Services. However every Business Service should have both the Client and Business listed so it should not matter which report you select.



- Under the Outline tab, the report will automatically pull the Client: LABSC Clients and Business Service: Business Service ID columns. You will also need the following columns: Business Service: Dare Service Provided, Business Service: Business Services, Business Service: Business Service Status, Business Service: Case Note. See the section Building a Report for more information. Make sure to save the report.

Columns ▼

Add column... 🔍

- Client: LABSC Clients ×
- Business Service: Business Service ×
- Date Service Provided ×
- Business Services ×
- Business Service Status ×
- Case Note ×

5	Ekaterina Evdokimova	BP-12979
6	Ekaterina Evdokimova	BP-12980
7	Ekaterina Evdokimova	BP-12982

5. Under the Filters tab, the report will automatically filter all your clients. If your admin staff created the client entry then the client might be under their name, so you should can change the Show Me filter from My clients to All clients. To only see one client then add the filter Client: LABSC Clients with the operator equals (if you have the exact name entered in Salesforce) or contains (if you don't know the exact name). If you only want to see the services provided to this client in the current Program Year, then change the Date of Birth filter to Date Service Provided and change the range from All Time to Current FY.

REPORT ▾
Case Note Report ✎ Clients with Business Services

Fields >

☰ Outline

▼ Filters 2

Filters

Add filter... 🔍

Show Me
All clients

Date Service Provided
Current FY (Jul 1, 2020 - Jun 30, 2021)

Client: LABSC Clients
contains ekaterina 🗑️

✔️ Previewing a limited number of records. Run the report to see everything.

	Client: LABSC Clients ▾	Business Service: Business Service ID ▾	Da
1	Ekaterina Evdokimova	BP-16781	
2	Ekaterina Evdokimova	BP-16844	
3	Ekaterina Evdokimova	BP-17345	
4	Ekaterina Evdokimova	BP-17426	

6. Click on Save and Run to review and/or export the report.