



## Southwest Wisconsin SBDC (Small Business Development Center)

Counties: Crawford, Grant, Green, Iowa, Lafayette, and Richland  
Register: [tinyurl.com/SWWISBDC](http://tinyurl.com/SWWISBDC) (Free and confidential consulting)  
Email / Web: [swwisbdc@uwex.edu](mailto:swwisbdc@uwex.edu) / [www.wisconsin sbdc.org/swwi](http://www.wisconsin sbdc.org/swwi)



### Southwest Wisconsin - Small Business Development Center (SBDC) – Center Information – Client Version

The Southwest Wisconsin – SBDC is part of UW-System and is a statewide network supporting entrepreneurs and business owners through free, confidential consulting. Businesses are referred to us by economic development personnel, lenders, accountants, lawyers, chambers, and others.

Coverage area of Southwest Wisconsin - SBDC:

- Crawford
- Grant
- Green
- Iowa
- Lafayette
- Richland



Business stages we consult:

1. Existing businesses that want to expand, transition, or improve
2. New local, regional, and international business ventures
3. Ideas or inventions that require greater startup research (lean startup) and investment rounds
4. Business acquisitions, on both the buyer and seller side

Consulting work categories that have helped clients (most common items, not an exhaustive list):

- Financial option search help and financial packaging assistance
- Pro forma financial statements needed for lenders or investors
- Business plan/model development and analysis
- Marketing and sales growth planning
- Executive management consulting; Strategic and tactical planning
- Operations, employee, risk and financial analysis help



Resources offered by Southwest Wisconsin - SBDC (examples only, not an exhaustive list):

- Template with an input sheet to create 3 year projections including income statement, cashflow, balance sheet (plus a sources and uses statement); can complete with prepared clients in about 90 minutes
- Business plan template and access to discounted software for business planning
- Market and industry analysis resources document with links to understand market size and potential
- In-depth list of regional funding options and connections to achieve complicated financial projects

Southwest Wisconsin SBDC process:

1. All clients signup via a quick and easy online form (<http://tinyurl.com/SWWISBDC>), this takes 5-10 minutes
  - Upon completion the system will email both the client and the SW WI office
2. Representative from our office calls to explain SBDC service and help clients get initial questions answered
3. In most instances, clients completes our one-page business information document based on business stage (new, existing, or purchase); can also send business plan. Most clients completed one-page form in an hour.
4. Clients and SBDC consultant work through process via phone or in-person to accomplish needed results



### Southwest Wisconsin SBDC (Small Business Development Center)

Counties: Crawford, Grant, Green, Iowa, Lafayette, and Richland  
Register: [tinyurl.com/SWWISBDC](http://tinyurl.com/SWWISBDC) (Free and confidential consulting)  
Email / Web: [swwisbdc@uwex.edu](mailto:swwisbdc@uwex.edu) / [www.wisconsinsbdc.org/swwi](http://www.wisconsinsbdc.org/swwi)



#### How a consulting session works:

Our consultant first learns about your background and situation so he can help you attain your goals. Each interaction varies by the business type and needs, and all discussion is tailored to your needs. In business there are a lot of concerns and questions. Our process brings focus so you understand what needs to be done and how to do it.

#### How to prepare for the first meeting and what to bring:

- ✓ Write down and bring your most important questions and topics you would like to discuss.
- ✓ Be ready to talk about the business concept and your experience.
- ✓ Be open minded and ready to listen (you will likely want to take notes).
- ✓ For people who are looking to create financial statements they should bring the following lists
  - Startup Expenses (what you need to get the doors open)
  - Fixed Expenses (recurring costs each month or year like rent, insurance, utilities, and so on)
  - Variable Expenses (costs that vary with each sale like cost of goods sold, shipping, and so on)
  - Sales estimates (and how you created them)


#### Recent success stories from the Southwest Wisconsin - SBDC:

Existing Business Success Story (Paul Saether):  
<http://www.wisconsinsbdc.org/client-success/blanchard-hall-family-deep-business-roots-opens-event-facility>

New Business Success Story (Adhem Theriault):  
<https://www.wisconsinsbdc.org/client-success/eco-tree-company-healthy-trees-healthy-business>

#### Meet our business consultants:

	<p><b>Brock Waterman: Senior Business Consultant (SW WI SBDC since December 2015)</b> Brock has over 20 years of business experience including owning a consulting business (16 years) and is the President and co-owner of Waterman's Forage / Chopper Box Repair &amp; Sales (second generation business that started in 1984). Brock's well-rounded background includes expertise in areas like financial packaging, projection creation, marketing, business model and process analysis, lean startup, financial analysis, and more. He has been Teaching Team Mentor for the IDeadvance Seed Fund grant (<a href="http://uwideadvance.org">uwideadvance.org</a>) for 3 cohorts. LinkedIn Profile: (<a href="http://www.linkedin.com/in/brockwaterman/">www.linkedin.com/in/brockwaterman/</a>)</p>
	<p><b>Kristi Smith: Business Consultant (SW WI SBDC since March 2018)</b> Kristi has over 14 years' experience as a business consultant in addition to starting, managing and selling businesses herself. She owns and operates Rainbow Confections and Fudgeraiser in Monroe and also serves on the Board of Directors for Main Street Monroe. LinkedIn Profile: <a href="http://www.linkedin.com/in/smithkristi/">www.linkedin.com/in/smithkristi/</a></p>

 <a href="http://www.foodfinanceinstitute.org">www.foodfinanceinstitute.org</a>	<p>Brock is a Certified Premier Food Finance Institute (FFI) SBDC Consultant. FFI provides rigorous training, resources, tools and mentorship to consultants so they can provide sophisticated financial technical assistance to food, beverage and value-added agriculture businesses. Brock helps businesses optimize their models for profitability and develop realistic financial plans to support growth.</p>
---	---