

# Small Business Financing Initiative







## Small Business Finance Collaborative: Growth Plans Break Out

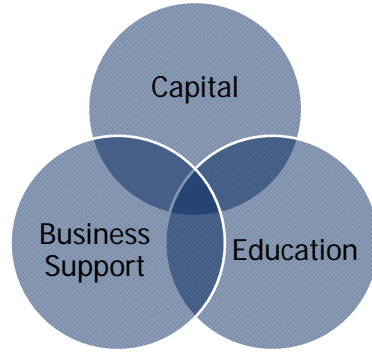
June 30, 2015

Small Business Financing Initiative

## Agenda

-  Overview and Context
-  Finance Collaborative Growth Plans
-  Growth Plan Pitches
-  Reflections from Participants on the Value of the Growth Plan Experience

## Goldman Sachs 10,000 Small Businesses

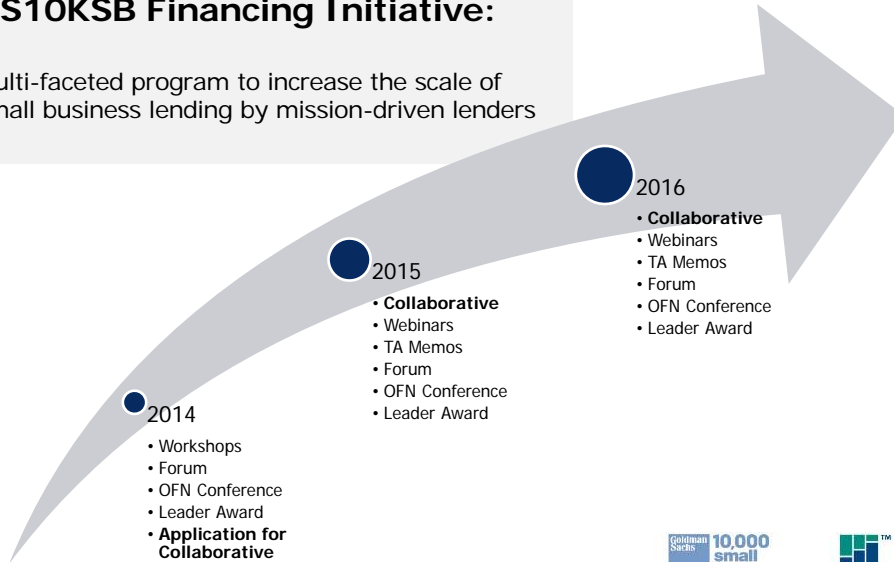


Helps entrepreneurs create jobs and economic opportunity by providing greater access to education, capital and business support services.



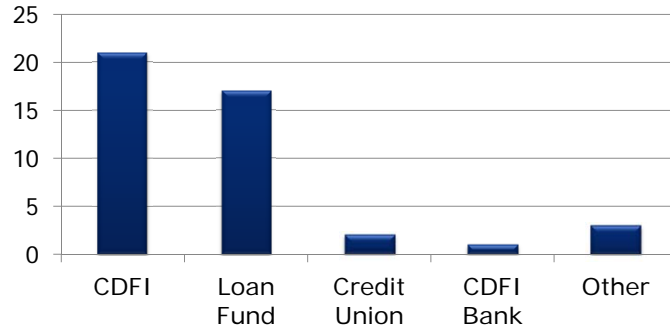
## GS10KSB Financing Initiative:

Multi-faceted program to increase the scale of small business lending by mission-driven lenders

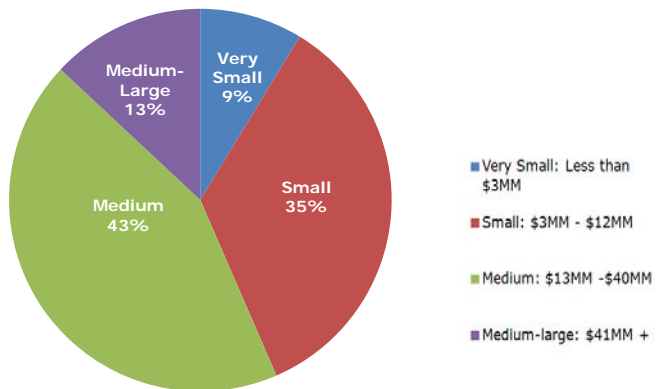


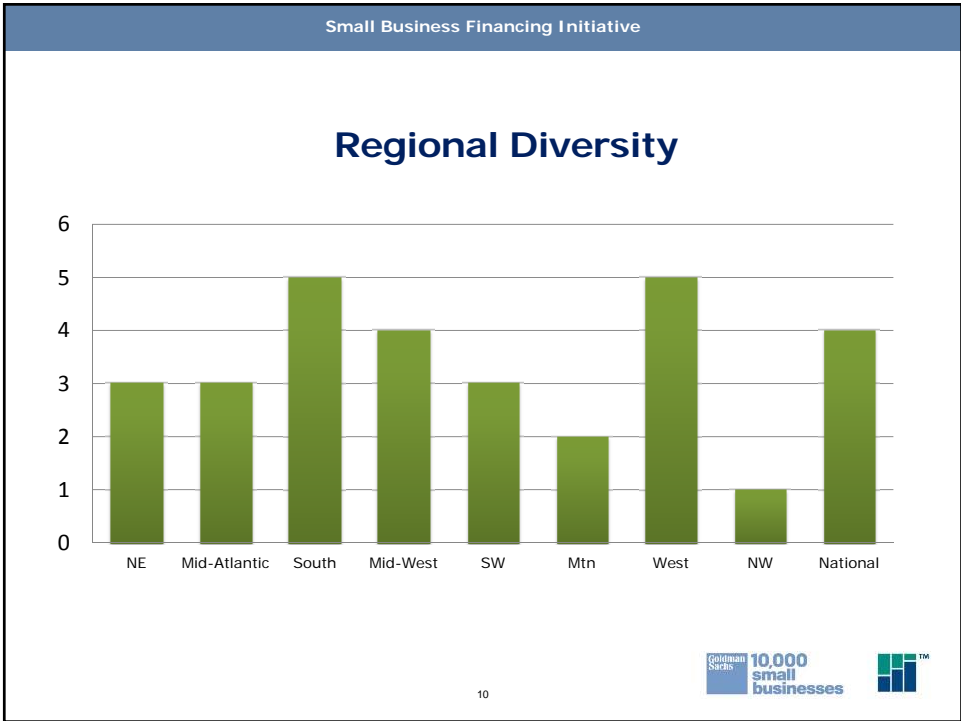
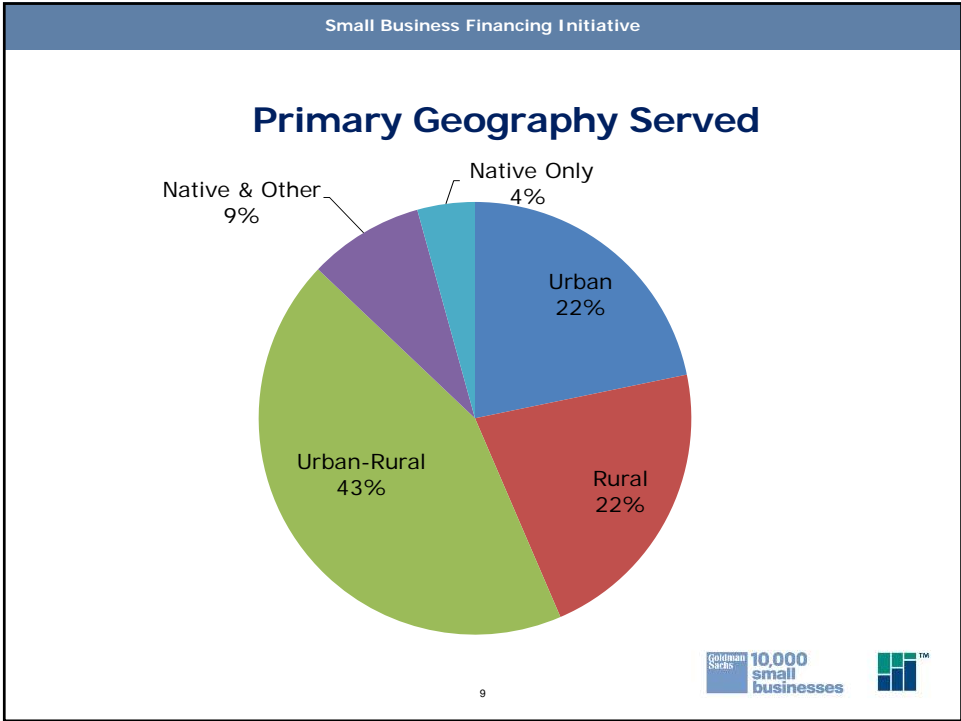


### Type of Mission-Driven Lenders

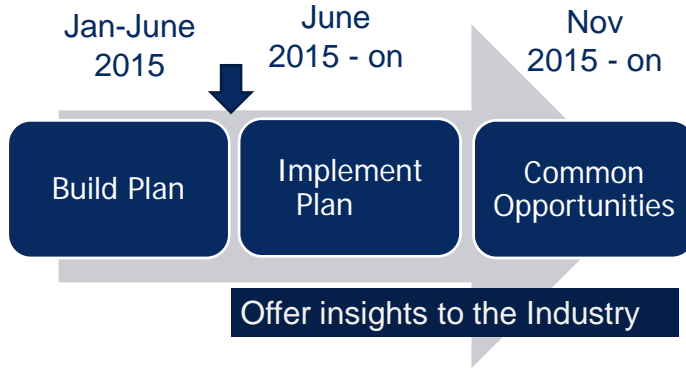


### Small Business Portfolio









## Finance Collaborative Timeline



## Growth Plan Components

-  Executive Summary
-  Growth Goals
-  Focus on the Customer: Customer Problems, Customer Segments, and Value Proposition
-  Growth Opportunities and the Competitive Marketplace
-  Operational Efficiencies: Lending Life Cycle and Technology
-  Customer Channels
-  Money, Impact, and Metrics
-  Organizational Culture, Leadership, and Performance





## Building Growth Plans January to June 2015

### 2 Tracks

- Participate in 10KSB National Cohort led by Babson in Massachusetts
- Participate in OFN-led program that built upon the Workshop curriculum

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## Growth Plan examples

-  Completed robust plans ranged from 35-40 pages
-  "Pitches" are 3-5 slide summaries of plans, succinctly articulate in a compelling way
-  Also hear from others who have been part of this process
-  The value of planning, some of the concepts and tools that were most valuable to them

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## Feedback as you listen

- Questions I have about your plan are:
  
- The elements of the plan which I found most effective were:
  
- From my experience, cautions to consider as your plan evolves are:

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## Presenting are:

- CDC Small Business
- Virginia Community Capital
- Montana CDC
- Colorado Enterprise Fund

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