

The Power of Process

The SCORE Business Counseling Process™ is an example of a “people process” that has proven itself, maximizing the value of the time the client and counselor spend together. It is effective for the first meeting or subsequent follow-up meetings. It is effective for the start-up discussion as well as the existing business problem/opportunity discussion. It also works in the new internet, e-mail counseling world. It is important that both the SCORE client and the SCORE counselor understand the five steps in the Business Counseling Process™ and that they use the five steps to guide their communications. What follows is a brief review of those steps and some of the “whys” these steps have proven themselves.

Establish Rapport The old adage “you cannot tell a book by its cover” comes to mind when discussing this step. Exploring backgrounds, experiences and life lessons is an important part of any productive human interaction. Common ground is important ground for all participants to occupy. This begins the mutual respect that is so important as the counseling process unfolds.

Conduct Needs Assessment This is the part of the counseling session where the new client discusses their business need and the established client reviews the results of their “homework” assignment. For the new client who may be experiencing SCORE services for the first time, it may be there is not a match – ie, SCORE is not a source of loans and that is why the client is there – or that their need is very specific – ie, they need a lead on a CPA or attorney or business insurance agent. This could mean the first session is short and there is no follow-up required. For the established client, the session could lead to more homework and additional assessment activity or it could lead to moving on to the next step.

Identify the Business Goal, Challenge or Opportunity For the established business person, this discussion is usually about a documented challenge that has recently presented itself or a documented opportunity that the client wants advice on pursuing. For the business start-up client, the discussion usually focuses on their business vision and how far along they are on establishing a written business plan. The motto for this activity could be “a situation well defined is half resolved”. Moving toward having “things” on paper (versus in one’s brain) is an important result of conducting this step. Additional homework could also be required.

Prepare and Implement Plan This is the part of the process where both the new client and the established client are refining and organizing their written plans and beginning to implement their plans. There is discussion around measuring techniques being used to measure business progress (how do I know we are achieving business goals?). Additional areas of research could also come up at this point in the process to insure the appropriate level of detail is achieved.

Obtain Feedback & Set Roadmap for Mentoring

It is always important for the client to give the SCORE counselor feedback on the counseling he/she is receiving and how helpful the counseling is to the client. This needs to be a very “honest” discussion in order to make any and all future sessions productive for all parties. The same is true for the counselor to be honest with the client regarding the benefit of additional counseling sessions. Once this “feedback” discussion has occurred, the need for future interaction between the client and the counselor can be established.

Process is indeed a powerful tool for business and a powerful tool for a successful interaction between SCORE clients and SCORE counselors.

