

# For the Life of Your Business

SCORE Support for Small Businesses from Idea to Exit

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# About SCORE

Mission, Vision, Values,  
and Services



# The SCORE Story – 59 Years of Volunteers

SCORE was formed in 1964 as a resource partner of the U.S. Small Business Administration whose mission is to help aspiring and existing businesses succeed.

Since then, we've helped more than **11 million people** in pursuit of their business goals.

- **Our Mission** is to foster vibrant small business communities through mentoring and education.
- **Our Vision** is that every person has the support necessary to thrive as a small business owner.
- One of our **Core Values** is that our clients' success is our success.

# Why SCORE Works

## You Don't Have to Go It Alone

Leveraging SCORE's full range of services and resources provides the best chance for success. It equips you with the information you need to make sound decisions for your business and you have a partner that's invested in helping you reach your goals.

- **Mentoring** helps minimize risk and provides improved chances for startup and success through one-on-one business coaching.
- **Workshops** provide training on critical topics in an environment where you can learn from experts and like-minded entrepreneurs.
- **Online Resources** can be your playbook to provide step-by-step outlines for small business strategies.

We're here *for the life of your business* – providing **free** advice for as long as you own your business.

# How SCORE Can Help You

## Tools for Business Success Available 24/7

Get access to thousands of **free** business templates & tools, blog posts, and online courses to help you start and grow your business.

- **Resource Library** - Articles, assessments, outlines, templates, and other resources that you can use to learn and implement new strategies
- **SCORE LIVE Webinars** – Live presentations by mentors and partners on a variety of small business topics and trends
- **Recorded Webinars & Courses on Demand** – Business training modules archived on score.org.
- **Blogs & Articles** - Business experts in a number of industries share information on emerging trends and topics facing today's small business owner
- **Data Reports & Infographics** - Provide information on emerging trends that affect the small business landscape. Includes data on entrepreneur sentiment, the U.S. economy, and more.
- **SCORE Newsletters** - Subscribe to get the latest business information, tips and resources delivered to your inbox

**Homework** – SCORE.org; sign up for email notifications of webinars and new tools



# The SCORE Story

This is possible through the effort of our volunteers nationwide.



Who We Are:  
**Over 10,000**  
**Volunteers**  
serving clients in over  
1,500 communities

# The SCORE Story – Why SCORE?

- Through various programs, the SBA generally guarantees 85% or 75% of a small business loan
- Small Business Owners Face Challenges
  - SBA reports that 20% fail in 1<sup>st</sup> year
  - 50% fail within 5 years
  - SCORE reports that 82% of businesses that fail have cash flow issues
  - Forbes, Investopedia and others list key factors in small business failure:
    - No marketing plan
    - Marketing missteps
    - Failure to embrace digital marketing
    - Failure with a web presence
    - Failure with social media presence
- To ensure survival and growth of small business and keep them repaying their loans, small businesses need resources
- **SCORE mentoring & education reduces risk and increases the opportunity for small business success!**

# The SCORE Story

Thanks to our volunteers, last year SCORE helped:



Create 30,453  
new businesses



Create 82,117  
non-owner jobs



Create 112,570  
total jobs



# The SCORE Story – Diversity, Equity & Inclusion

- Code of Ethics: SCORE volunteers do not discriminate on the basis of race, color, gender identity/expression, national origin, age, religion, marital status, physical ability or sexual orientation.
- Focus on the underserved, but include all:
  - Women
  - LGBTQ
  - Veterans
  - Black
  - Hispanic
  - Indigenous
- Organizationally – expand diversity, practice inclusion
  - Committees
  - Leadership
  - Mentors
  - Outreach/Partnerships

# SCORE SE Wisconsin Partners

## National & State-Wide

*Long-Term Partners & Broad Reach*

Logos displayed in this section include: SBA (U.S. Small Business Administration), VBOC (Veterans Business Outreach Centers), WWBIC (Wisconsin Women's Business Initiative Center), African American Chamber of Commerce of Wisconsin, Wisconsin Black Chamber of Commerce, Wisconsin Chamber of Commerce, and Wisconsin Economic Development.

## Focused Partners

*Strategically Aligned to Key Initiatives*

Logos displayed in this section include: MKE Black, SGGN Group (Entrepreneurs Society), Sherman Phoenix Marketplace, Latino Chamber of Commerce of Southeastern Wisconsin Inc., and Latino Entrepreneurial Network Inc.

## Local Partners

*Local Organizations Focused on Supporting Small Business Owners*

Logos displayed in this section include: TRG Marketing, The Commons, Scale Up Milwaukee, American Legion, First Citizens Bank, Ozaukee Nonprofit Center, Ottawa University, Brockfield Chamber of Commerce, and RAMAC Racine's Business Champion.

Effectively Align Our Efforts to Amplify Our Collective Impact with Key National, Focused, & Local Partners

# The SCORE Story

SCORE is committed to helping every person succeed in their small business endeavors. We are dedicated to serving clients in diverse industries and at every stage of business.

- **Early stage entrepreneurs**, who are considering starting a business but need help defining their ideas, building their plan and obtaining financing
- **Start-up businesses**, who are seeking to establish their business and manage their finances
- **Established businesses**, who are seeking to grow their business and increase their revenue or customers
- **Transitioning businesses** who are planning to close, sell, or otherwise transition out of owning the business

In the past year we helped clients in these industries:

Accommodation, Travel, Restaurant, Food Services
Accounting, Tax, Bookkeeping, Payroll
Advertising, Public Relations, Marketing
Agriculture, Farming, Ranching
Architectural, Engineering
Arts, Entertainment, and Recreation
Computer System Design
Construction/Manufacturing
Educational Services
Finance and Insurance
Health Care and Social Assistance
Information Systems

Legal Service
Management/ IT Consulting
Mining, Quarrying, and Oil and Gas Extraction
Other Professional Services
Public Administration/ Utilities
Real Estate, Rental, Leasing
Retail Sale/ Trade
Special Design Service
Transportation and Warehousing
Waste Management and Housekeeping Services
Wholesale Sales/ Trade
Other



# About SCORE WI / UP District

Local Resources for Aspiring and  
Existing Small Business Owners





# SCORE WI/UP District

Covers entire state of Wisconsin & Upper Peninsula Michigan

- 5 Chapter locations
  - SE Wisconsin
  - West Central WI & UP
  - Madison
  - Fox Cities
  - Green Bay
- <https://www.score.org/>
- By the numbers:
  - 209 Mentors
  - 112 Local Workshops
  - 87 National Webinars
  - 5271 Mentoring Sessions
  - Plus collaborative events, such as “Trailblazers”
- IMPACT:
  - 565 New Businesses Started in 2022
  - 1440 Jobs Created
- Popular workshops include Marketing, Digital Marketing, Finance, Business Planning, Pricing & Tech including AI
- Statewide Educational Opportunities:
  - Watch for **Accelerate Your Business 2024** - Women small business owner event, Green Lake, WI

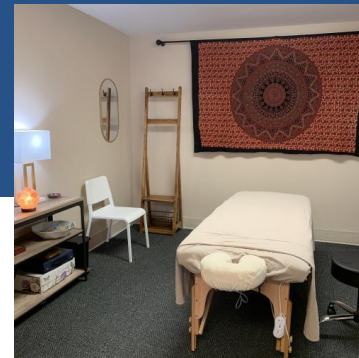


# SCORE Success Stories

Client Perspectives



# SCORE Success Story



**Meta Massage & Bodywork:** Brianna Malueg and Kate Fitzpatrick

**What:** Massage therapy & center for healing – Shorewood WI

**Why:** Create a holistic approach to healing through massage, bringing together education, certifications and experience

**High and Lows:**

- Repeat customers are their biggest measure of success. Sharing their experience by training others is also fulfilling.
- Back office operations and spreadsheets are the most difficult.

**Why SCORE?:** Lack of business knowledge led to a long string of Google searches. SCORE came up several times and they signed up for mentoring.

**How SCORE helped:** Mentor Gregg Schieve answered questions, gave confidence in decision making, guided planning, provided resources (homework)

**Advice:** Get a mentor! Business ownership is hard work, but a mentor can help you be more efficient.

<https://www.score.org/sewisconsin/success-story/stressed-success>

# SCORE Success Story

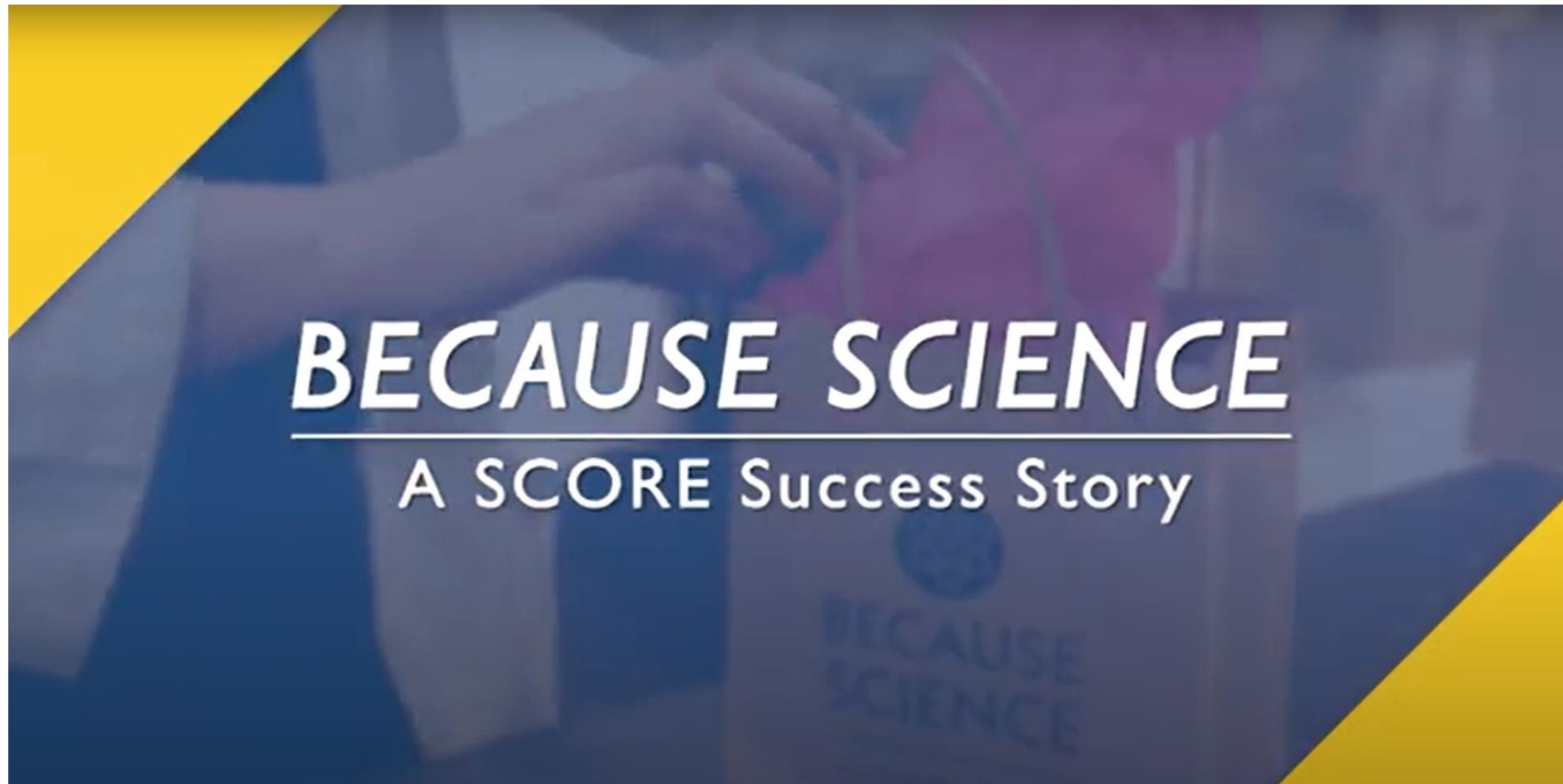
- [SCORE Success Story: Grants Ink](#)





# SCORE Success Stories

- [SCORE Success Story: BECAUSE SCIENCE](#)



# SCORE Success Stories

- [SCORE Success Story: Claim Revolution](#)





# Client Success Stories

- [SCORE Success Story: Fit Learning](#)





# Volunteer with SCORE

Help Make a Difference  
in Our Community

# Volunteer Roles

- **Mentor** - an advisor who provides free business advice to aspiring and existing business owners to help them achieve their business goals.
- **Subject Matter Expert (SME)** - assists clients in your specific skill and expertise. Co-mentor alongside one of SCORE's certified mentors.
- **Workshop facilitator** - teaches classes on a business topic and help our clients network and share best practices with each other.
- **Chapter support** - provides invaluable skills in support roles including finance, marketing, technology, fundraising, and reception work.
- **Leader** – After at least 1 year with SCORE, there are many opportunities for those who possess leadership skills and enjoy the thrill of casting vision, rallying individuals toward it, and helping people leverage their unique strengths to fulfill our mission.

# Ethics and Training

In order to protect our clients, SCORE has a code of ethics that all volunteers will need to agree to and sign annually.

## **Our code of ethics states:**

- SCORE members are unable to make money in any way from SCORE clients.
- Volunteers may not use our client or member database for commercial reasons.

We also ask you to commit to training around your specific volunteer role that will help you:

- Learn about SCORE policies and best practices, as well as tips for achieving success within your role.
- Enhance your knowledge and skills in our Lifelong Learning educational offerings.

# Steps to Become a Volunteer

- Decide which role(s) you want to fill and make sure you agree to SCORE's Code of Ethics.
- Fill out the volunteer application form located at: [www.score.org/volunteer](http://www.score.org/volunteer).
- You will be contacted by a member of our recruiting team who will schedule interviews to determine if there is a mutual fit.
- Once accepted, you will be asked to complete an orientation and training program with the guidance of a **SCORE Coach**.
- Additionally, if you are selected to mentor clients, you will **co-mentor** through a provisional period to help you get comfortable.
- Certification is granted after a minimum of 3 clients are co-mentored.



# THANK YOU!

## **Don't Wait.**

Contact us today to

- Start or grow your business
- Become a SCORE volunteer

Call or visit us online:

- 800-634-0245
- [www.score.org](http://www.score.org)

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