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### *9 Steps to Facilitating VR Customer Progress with Self-Employment*

Hot off the press! The *Counselor's Workbook for Documenting & Tracking Customer Venture Development Progress* has been updated to reflect additional enhancements based on collective input as more Customers progresses through the 5 Steps/Tier 1 and 10 Steps/Tier 2 self-employment development programs. Sharing the changes are best introduced by highlighting each of the 9 steps required when counseling a Customer from start to finish.

**Step 1 | Disclosures and Agreement to Participate** ...offers a great way to review with Customers what the program “is” and what it “isn’t.” Having both parties’ sign it also adds a nice level of formality to the communication exchange.

**Step 2 | Customer Contact Log** ...offers an optional area beyond the case file notes to log dates of key communication exchanges and summarize progress areas along the way.

**Step 3 | Tier 1 Proposal and Tier 2 Plan Requirements** ...represents a 1-page summary detailing what is required when participating in the Tier 1 and Tier 2 programs respectively.

**Step 4 | Tier 1 and Tier 2 Tracking Agreement** ...a 1-page “checklist” to use for tracking and *celebrating* Customer progress through each of the required steps along the way!

**Step 5 | Customer Profile Assessment (Form 1 of 3)** ...represents the first of 3 separate stages where Counselors check-in with their Regional Directors to mutually conclude that the Customer is and remains a valid candidate for Self-Employment. This first stage is about agreeing that the Customer is profiled to pursue the self-employment process.

**Step 6 | Business Concept Assessment (Form 2 of 3)** | ...as the 2<sup>nd</sup> of the 3 stages, this form is about agreeing that Customer has a valid business concept by which to build upon given their skills, interests, experience and vocational capacity.

**Step 7 | Bookkeeping Collaboration Agreement** ...a 2-part form required where the Customer identifies a bookkeeper who, once the venture is launched, will be available to support tracking actual performance against projected performance post-launch to validate vocational progress.

**Step 8 | Business Readiness Checklist** ...introduces key areas to be checked off to ensure that they’ve been sufficiently addressed, such as insurance, recordkeeping, zoning, etc.

**Step 9 | Tier 1 Business Proposal/Tier 2 Business Plan Assessment (Form 3 of 3)** ...provides the final stage of review and is completed by an independent, authorized business consultant who reviews and verifies that all required components are in place and the business model represents a solid and viable vocational opportunity.

In summary, the above offers a total picture of your role as Counselors when supporting Customers through the Self-Employment development process. Enjoy **and thank you!**

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