


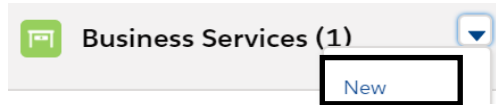


Adding a Business Service

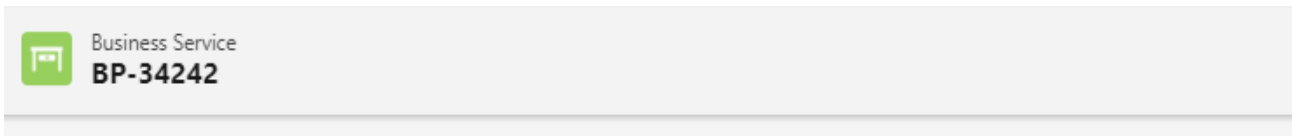
As clients and businesses are added to Salesforce, you need to record all the assistance and services provided to them.

Add a Business Service

1. Go to the Client page.
2. Click on  next to Business Service in the right side bar and select New.



3. The client field will be automatically populated, so search for the business name. The required fields are **Business Services**, **Business Service Status**, and **Plan Developed** but you will need to enter more data in order for the business service to appear on your Dashboard. Enter all applicable information:





f Related Details

Business Service ID BP-34242	a	Business Service Status Completed
Business David Van Arsdell Architects, PC	b	Plan Developed: ⓘ WITH BSC Staff Assistance
Client David Van Arsdell	c	Date Service Provided 1/25/2023
d Business Services Loan/Grant Preparation Assistance		Date Completed ⓘ 5/10/2023

e **Additional Information**

Case Note Effective July 1, 2023, case notes no longer need to be entered under the Business Service entry. Instead Case Notes are to be entered in the Notes section on the Business page. See example on page 18.

Edit Delete Change Owner 

Notes (1) 

Business Services Case Notes
6/7/2023 3:10 PM by Yovana Perez
5/10/2023 Loan funded. The client picked up the loan check
loan committee approved the borrower's loan application. BSC emailed th...

a. **Business Service Status** Keeps track of the status of the business service being provided. Once the service goal is complete then change the status to Completed. This service will only be counted on the Dashboard once the status is changed to “Completed.”

b. **Plan Developed** Select who is providing the business service from the following dropdown options:

WITH BSC Staff Assistance: Select if the service was provided by BSC staff.

WITH BSC's Consultant Assistance: Select if the service was provided by your agency's contracted consultant.

WITH BSC's Partner Assistance: Select if the service was provided by your agency's community and/or business partner.

WITHOUT BSC Program Assistance: Select if the client completed the service prior to or without BSC assistance, but you want to record they received it.

Please note: All three “WITH” options will be counted on your dashboard for business services once marked as “Completed” in the status section.

c. **Date Service Provided** Enter the date of the first day this service was provided to the client.

Date Completed Enter the date this service was completed.

d. **Business Services** Select the business service provided to the client. Current types of Business Services:

General Business Services

- **Needs Assessment** Identify services and interventions appropriate for the stage and needs of that specific business. Services will be tailored to the needs of the business to achieve optimum outcomes.
- **SWOT Analysis** Teach the strategic planning method structured on four elements of concern - strengths, weaknesses, opportunities, and threats.
- **Business Plan/Executive Summary** Assistance in preparing or updating a business plan that identifies and analyzes economic, technical, and financial feasibility.
- **Business Planning** Discuss the legal and tax benefits as well as drawbacks to different legal structures. Assist start-ups with basics such as market identification, market entry, breakeven budget, and market pricing data
- **Business Compliance Requirements** Assistance with compliance with business regulatory requirements. Provide technical assistance to comply with new regulations necessary for the continuation of the business.
- **Marketing/Social Media** Support with building business brand and providing social media tools to market and promote the business. Introduction to social media platforms customers use every day like Facebook and Instagram and selling products on online marketplaces like Amazon, Facebook and Instagram Market and eBay.

- **Market assessment** Assist with creating a comprehensive analysis of environment forces, market trends, entry barriers, competition, risks, opportunities and the company's resources and constraints using tools such as Census Business Builder.
- **Marketing Plan Development** Help develop a well-crafted, strategic marketing plan by setting marketing goals, conduct a marketing audit, conduct market research, analyze the research, identify a target audience, determine a budget, develop specific marketing strategies, develop an implementation schedule for the strategies, and create an evaluation process.
- **Permits/Licenses** Assistance to ensure that proper local, state, and federal business registration processes, permits, licenses, Fictitious Business Name, and certifications are obtained to operate a business legally in the City.
- **Mentorship/Collab Set-up** Help build collaborations between clients. One approach is for seasoned clients to mentor other clients whenever possible.
- **Business Tax Preparation Support** Help business owners prepare for their federal, state, and local taxes such as gathering all the required documentation and reviewing
- **Tax Consulting** Help business owners understand their federal, state, and local tax requirements. Identify tax incentives and rebates for the client's business
- **Disaster Resiliency** Building the capacity of businesses — both to prepare for and recover from emergency, events, and build long-term financial security. Including earthquake and fire preparedness plans, appropriate and adequate insurance, etc.
- **Legal considerations** Share information on free legal workshops and pro bono clinics
- **Lease negotiation assistance** Assistance with Commercial Office and Retail Lease Negotiation, Commercial Lease Counseling, or other lease related services.
- **Site-finding assistance** Help start-ups or home businesses find a location or assist existing businesses look for new locations to expand or move including developing a cost analysis based on the targeted leases and determine the best opportunity.
- **Certification** Go over the benefits of certification and which certificates the client qualifies for. Assist with gathering all the required documents and help with the various
- **Procurement** Provide training on the procurement process for contractual opportunities with the City and other government entities including navigation and enrollment on the Los Angeles Business Virtual Network (LABAVN) system.
- **Franchise Development Planning** Help develop a franchise strategy and business plan, guide the client with any necessary market research, competitive benchmarking, gap analysis or financial modeling.
- **Succession Planning** Assist with an evaluation of the business, identification of key positions in the organization and potential successors as well as any necessary training and support planning. In addition, help the client plan and develop talent pipelines for the future.

Financial Services

- **Financial Analysis** Assist Clients with an assessment of the viability, stability, and profitability of a business to ensure increased profitability.
- **Projections Preparation** Forecast future revenue and expenses to help you pitch to potential investors, for inclusion in your business plan or for other funding opportunities.
- **Credit Report Review** Provide training on how to read personal and business credit reports. Review payment history with the client to investigate low scores.
- **Business Accounting/Budgeting** Analyze the client's business accounting procedures and financial condition for areas of improvement. Suggest optimal bookkeeping procedures and standards that ensure proper financial management and legal compliance for the client's business.

Access to Capital

- **Loan Prep Assistance** Provide free loan packaging services including reviewing the project feasibility to obtain funding to start, expand, or purchase a business. Discussing potential local/state/federal programs available to fund the business including eligibility requirements. Preparing loan applications tailored to meet specific program requirements from the information provided by the client. Connecting the client to Lenders and help answer questions about the process.
- **Cash Flow Management** Track and analyze a business's cash flow to determine the liquidity and solvency of the business: cash flow from operating activities, cash flow from investing activities and cash flow from financing activities. Providers should also have the skills to conduct liquidity and profitability ratio analysis, assess the impact that changes in costs have on financial statements, and understand how these relate to a company's financial targets.

Technology

- **Cybersecurity** Show common practice prevention methods against Cyber Security threats such as hacking, malware, and phishing.
- **Website Optimization** Use tools and software like Google Analytics, advanced strategies, and experiments to improve the performance of clients' websites, to further drive more traffic, increase conversions, and grow revenue. One of the most critical aspects of website optimization is search engine optimization (SEO) to improve the quality and quantity of website traffic to their website from search engines
- **Website Development and Management** Work with partners for website development and creation for businesses without an online presence. Conduct e-commerce audits of existing websites to identify opportunities for improvement. Improve business websites by connecting small businesses to create and design services including photographers, web designers, among others.

Please note, the following business services were added just for Sidewalk Vending:

- Sidewalk Vending - BTRC
- Sidewalk Vending - Seller's Permit
- Sidewalk Vending - Public Health Permit
- Sidewalk Vending - Plan Check
- Sidewalk Vending - Cart Inspection
- Sidewalk Vending - StreetsLA Merch Permit
- Sidewalk Vending - StreetsLA Food Permit

- e. **Case Note** Effective July 1, 2023, notes describing services delivered and outcomes achieved or in progress must be entered in the “Notes” section located on the business page. Case notes need to be clear, concise, objective, and in chronological order. A centralized location for notes allows for a comprehensive and chronological view of the assistance provided to the client. For more tips on writing case notes see: [Attachment 3 Guidance - Case Notes in Salesforce](#) part of Directive 23-03.

Best Practice Tip

If you provided services to a client you can email the client going over what was discussed and next steps. You can then attach this email to the service you just entered.

- f. **Notes & Attachments** Upload any emails or related documents (Needs Assessment, Market Assessment, Profitability Assessments, Debt Management Schedules, Business Plans, Marketing Strategies, etc.) on the right side bar or on the Related tab in the Business Service entry.