



SMALL BUSINESS SUCCESS CONFERENCE

Build your solid foundation for growth!

Tuesday, April 7, 2015

R. Thomas Flynn Conference Center
Monroe Community College
1000 E. Henrietta Road
Rochester NY 14623

Sponsored by



Keynote Speaker: **Dr. Bruce Katcher**

Learn what it takes to start a small business and keep it going,
and the building blocks needed to grow successfully.

We encourage you to tweet about your experience at the conference!

Twitter hashtag: **#RPCNconf**

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Corporate College

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This general survey leadership course develops senior leaders, managers, supervisors, group leaders and high potential professionals. The topics and training energize and challenge leaders to find pathways for effective and impactful relationships to motivate people and stimulate positive action through trust.

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- Leadership, Motivation, and Culture – Learn the nature of success and today's perspectives for motivation and leading others.
- Leadership and Building Trust – Learn the nature of trust and how it governs all aspects of a business. Develop a model and understand the technology of building trust.
- Communication and People Skills – Understanding others, situations, and how to manage each through emotional intelligence and effective conflict resolution builds respected leadership.
- Organizational and Corporate Skills – How to develop an excellent strategy, increase customer focus and actualize vision.
- Integrating Work and Your Life – Learn a 9-step model to successfully change initiatives. Improve utilization of time, plot the future with accuracy, and still obtain better work/life balance.

April 22 - May 20, 2015, Wednesdays (5 sessions)

8:00 AM - 12:00 PM

Instructor: Bob Whipple

Workforce forward.

WELCOME!

The **Rochester Professional Consultants Network (RPCN)** welcomes you to the **2015 Small Business Success Conference**.

As our region's premier organization dedicated to the advancement of the consulting profession, we have assembled a program rich in insights into the essential skills and practices of running a small business.

Whether you are an experienced consultant or small business owner looking to raise your practice to a higher level of accomplishment, or are new to the profession and looking for practical orientation about getting started, today's expert speakers will provide you with the concrete advice you need.

In addition to its educational content, the conference has been designed to provide you with lots of opportunities to meet others: the speakers, our exhibitors and, of course, your fellow attendees. Please take the opportunity today to broaden your professional network.

We are delighted to have you with us, and wish you a full day of learning and growth!

Jim Barton, Program Committee Chair
James H. Barton Consulting, LLC

David Bassett, RPCN President
Bassett IP Strategies

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It's not just about the order...It's the "HOW" that makes all the difference!



CONFERENCE SCHEDULE

Time		Track 1	Track 2	Track 3
7:30–8:15	Arrival			
8:15–9:15	Key-note		Words of Inspiration from a Successful Consultant – Bruce Katcher	
9:15–10:15	Session 1	Setting Up and Managing a “Virtual” Office – Jerry Seward	Marketing Business Services: How to Match Your Unique Selling Proposition with Customer Need – Jean Kase	How to Expand Small Service Businesses into New Areas – Dick Blazey
10:30–11:30	Session 2	The Business Plan: Its Purpose, How to Write One, and How It Should Guide Strategy Over Time – Doug Mabon	Marketing Essentials: Positioning Your Practice, Building Awareness and Reputation, and Using Social (and Other) Media – Laurie Enos	Three Pillars of Business Success – Thomas Biviano
11:30–12:30	Lunch			
12:30–1:30	Session 3	Finance for New Small Businesses: Getting Finance, Keeping Records, Bookkeeping and Insurance – Leslie Bamann and Mary Anne Burkhart	Lead Generation: Identifying and Qualifying New Leads and Networking to Turn Leads into Clients – Bob Manard	Improving Customer Project Outcomes: Defining and Measuring Success – Kate Washington
1:45–2:45	Session 4	Financial and Retirement Planning for the Business Owner – Paula Rogala	Highly Effective Proposals and How to Write Them – Mary Sperr	Great Consulting Service, But Who Needs It? (How to Interview Potential Clients About Your Value) – Bob Lurz
3:00–4:00	Session 5	Setting Pricing and Fees – Ram Dhurjaty	Getting Clients to “Yes”: The Skills and Psychology You Need to Close the Sale – Tracy Jong	Case Studies: Panel Discussion with Three Successful Solo Consultants – Tracey Aiello, Lori Cohen, Beth Sears
4:00–4:30	Closing		RPCN: An Organization by and for Consultants – Dave Bassett	

WORKSHOP DESCRIPTIONS

Marketing Business Services: How to Match Your Unique Selling Proposition with Customer Need

Consultants, freelancers and other service providers love their work. Too often, they neglect building a pipeline of qualified marketing leads to translate into profitable contracts. Learn marketing basics to help you solve this problem and increase revenues.

– Jean Kase

Setting Up and Managing a “Virtual” Office

Small business entrepreneurs often have the ability to work from a “virtual” office. We’ll examine many free and low-cost resources to keep your startup and ongoing costs to a minimum, while still being efficient, capable and flexible.

– Jerry Seward

How to Expand Small Service Businesses into New Areas

Frequently a consultant will come across business opportunities that he/she can’t handle alone. The opportunity may be too big or it may require skills that the consultant doesn’t have. Learn what you can do to take on these opportunities.

– Dick Blazey

The Business Plan: Its Purpose, How to Write One, and How It Should Guide Strategy Over Time

Prepare a business plan that serves you well; one that draws from a resourceful, supportive community that encourages you.

– Doug Mabon

Marketing Essentials: Positioning Your Practice, Building Awareness and Reputation, and Using Social (and Other) Media

Learn the basic areas of marketing that will get your small business moving in the right direction.

– Laurie Enos

Three Pillars of Business Success

Many businesses do not focus on the fundamentals. If done well, success is more likely. If not, failure looms. This talk will explore the three fundamental business pillars and their implications for success and failure.

– Thomas Biviano

Finance for New Small Businesses: Getting Finance, Keeping Records, Bookkeeping and Insurance

Learn all about the basic requirements for obtaining financing to get your firm up and running, and tips on how to keep your finances well organized for both tax purposes and monitoring your firm’s progress toward profitability.

– Leslie Bamann and Mary Anne Burkhart

Lead Generation: Identifying and Qualifying New Leads and Networking to Turn Leads into Clients

You will leave with multiple strategies to identify and qualify new leads and for transforming leads into clients, and also how to maximize the effectiveness of your networking.

– **Bob Manard**

Improving Customer Project Outcomes: Defining and Measuring Success

It is important that entrepreneurs identify and frame customer project objectives. Learn how to manage expectations and deliver exceptional results.

– **Kate Washington**

Financial and Retirement Planning for the Business Owner

Successful business owners know there are many potential and lasting rewards to be realized from long-term financial planning. This presentation will help you define your business and personal financial objectives, and provide concrete advice on how to achieve them.

– **Paula Rogala**

Highly Effective Proposals and How to Write Them

Discover the key components of a well-written proposal and how to respond to RFPs and use templates.

– **Mary Sperr**

Great Consulting Service, But Who Needs It? (How to Interview Potential Clients About Your Value)

Often, we start practices based upon our value assumptions—but do prospective clients agree? Without asking them, your practice can fail. Watch role-plays and learn how to interview prospects about your value. “Ask, don’t sell.”

– **Bob Lurz**

Setting Pricing and Fees

Establishing the value of services to a client is essential to your success. Learn about its effect on setting fees. This session will focus on strategies for setting fees and will be illustrated with a live example.

– **Ram Dhurjaty**

Getting Clients to “Yes”: The Skills and Psychology You Need to Close the Sale

How potential clients view the initial consultation and buying experience motivates them to hire you and creates confidence in your ability to serve those new clients.

– **Tracy Jong**

Case Studies: Panel Discussion with Three Successful Solo Consultants

Three successful consultants—and RPCN members—share tips and advice from their experiences as solo entrepreneurs.

– **Tracey Aiello, Lori Cohen, Beth Sears**

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lose that project or client
because your website, brochure,
proposal, e-mail message or report has
spelling, grammar, usage or other issues

√ Do
increase your visibility
with professionally written
press releases, articles and blog posts

√ Do
remind clients of your value
through well-written and graphically attractive
newsletters

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PRESENTERS

KEYNOTE SPEAKER:

BRUCE KATCHER is an industrial/organizational psychologist, founder and executive director of The Center for Independent Consulting, and president of Discovery Surveys. He conducts employee engagement and customer satisfaction surveys. He mentors consultants. His award-winning book, *30 Reasons Employees Hate Their Managers*, and his *An Insider's Guide to Building a Successful Consulting Practice* were published by the American Management Association. Visit www.CenterforIndependentConsulting.com for more information.



TRACEY AIELLO is the leader of The August Group, the founder of Winning Career Strategies, an independent financial planner and a personal development coach. He is passionate about helping others with their career and professional transitions.



LESLIE BAMANN is assistant vice president and business and economic development officer at Canandaigua National Bank and Trust. She has extensive experience in helping small business owners get started with their financial needs.



President of Bassett IP Strategies, **DAVE BASSETT** is a registered patent agent before the U.S. Patent and Trademark Office and has experience in optics, acoustics, mechanical, chemical, business method, computer and biomechanical utility patenting, and design patenting. He has an MS in chemical engineering and an MBA from the Simon School of Business.



Since 1991, **TOM BIVIANO** has helped his clients boost revenue, achieve a healthy business culture and have more control of their businesses with his entrepreneurial spirit, dynamic sales strategy, training and mentoring experience. Extensive career achievements include sales, consulting, technology and executive management at Procter & Gamble, Mobil and IBM.



RICHARD BLAZEY has more than 30 years of experience in R&D and holds 35 patents. He left Kodak in 2003 and founded Business Metamorphosis (BML), an innovation services business, then Intelligent Technology Trifecta, a patent brokerage, followed by the Rochester Penguin Group (business research) and Opportunity-Associates (business strategy).



PRESENTERS, continued

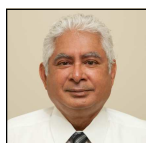
MARY ANNE BURKHART has more than 30 years of banking experience. As a business development officer with Canandaigua Nation Bank, she uses her experience and skills from branch management to acquire and grow new business relationships. She can assist with cash management services for both new and existing business customers.



LORI COHEN, president of Compass Quality Solutions, helps companies use the ISO 9001 certification process to improve business results. She is a Certified Quality Professional and holds a BS degree in Mechanical Engineering.



RAM DHURJATY has consulted for universities as well as industry, including Fortune 100 companies. His consulting includes strategic technology consulting, designing and implementing research systems for universities, and system design and implementation for the medical device industry. His work includes precision analog circuitry, high voltage power supplies and magnetics for X-Ray systems.



LAURIE ENOS, co-president of Blue Dog Marketing, has more than 20 years' experience in marketing. Enos has worked as a marketing manager and marketing director for various technology, engineering and financial investment firms. In 2012, she left the corporate merry-go-round and launched Blue Dog Marketing with Mary Sperr.



TRACY JONG is a 20-year legal veteran, advising small and mid-sized businesses on business and legal matters. Tracy Jong Law Firm works primarily with technology innovators and the food and beverage industry. Core strengths include patents, trademarks and representation of craft alcohol beverage manufacturers, restaurants, bars and nightclubs.



JEAN KASE is executive director of The Entrepreneurs Network (TEN) and High Tech Rochester's liaison for the Optics/Photonics/Imaging cluster. Kase is a Certified Contracting Assistance Specialist with Monroe County Finger Lakes Procurement Technical Assistance Center (PTAC). The common focus in her consulting work is helping Upstate New York entrepreneurs.



BOB LURZ coaches consultants to launch successful practices. He has helped many diverse organizations, giving him unique consulting insights. A “consultant’s consultant,” Lurz helps his clients understand their clients and achieve success. Lurz presents the highly acclaimed RPCN Consulting Boot Camps. He is an RPCN past president and founder-facilitator of the Business Forum. Visit www.ConsultantsAccelerator.com.



DOUG MABON is a Certified Mentor with Greater Rochester SCORE. Nationally, SCORE has 12,000 experienced volunteers, supported with tools and processes to assist small business. Mentoring is free to clients for the life of their business. SCORE is an alliance partner of the U.S. Small Business Administration and other community organizations.



BOB MANARD has 25 years’ experience as a multi-million-dollar-producing sales professional selling to companies ranging from small and medium businesses to the Fortune 500. He is a Certified World-class Speaking Coach and president of Speak4Results, where he helps clients to maximize their communications skills to generate important results.



PAULA ROGALA is a Certified Financial Planner at Waddell & Reed with 20 years of experience in financial services. She forms strong relationships with her clients by helping them define personal goals, creating a customized plan to realize those goals and working together to monitor progress toward those goals.



BETH SEARS’ expertise in interpersonal and organizational communication helps organizations break down barriers to create great places to work with loyal, engaged employees.



JERRY SEWARD has been an Internet and technology consultant since 1988. In addition to creating, hosting or managing more than 8,000 websites, Seward consults with sole proprietors and small businesses, helping them to select, install and use the best software, hardware and service plans to meet their technology challenges.

PRESENTERS, continued

MARY SPERR is co-president of Blue Dog Marketing and has more than 20 years' experience in marketing and sales, including overseeing the re-branding of an engineering firm. She launched Blue Dog Marketing with Laurie Enos to work in a field she loves. Sperr also serves as councilwoman for the Town of Chili.



KATE WASHINGTON is managing director of Enterprise Solutions International, with more than 15 years of experience in business consulting. ESI delivers and executes financial and strategic interventions to drive profitability for small to mid-sized businesses in North America and the Caribbean, applying an analytics-based approach to problem-solving and decision-making.



ACKNOWLEDGEMENTS

Conference Committee

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Marketing Chair	Laurie Enos
Website Chair	Jerry Seward
Attendance Chair	Bob Manard
Sponsorship Chair	Tracey Aiello
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EXHIBITORS

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FranNet of the Finger Lakes

www.frannet.com/index.php/microsites/jadams

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Bassett IP Strategies works with inventors at any stage in the inventive process. We can help you understand what it will take to bring your invention from conceptualization through to actual reduction to practice. We can make you aware of actions you should take as part of the process and some actions you might take that will make your invention unpatentable either in foreign countries or the United States.

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ABOUT RPCN

Founded in 1990, the Rochester Professional Consultants Network (RPCN) is a growing nonprofit organization of more than 100 consultants. Our mission is to help our members develop premier consulting businesses to provide the business community with a wide variety of outstanding consulting services.

We equip our members to deliver smart, innovative, customer-centered solutions by providing general business and consulting-specific education programs that include the Consulting Business Boot Camp, periodic TrendTalk dinners, and weekly morning meetings. Join us for the following events each Friday from 8–9:30 AM:

First Friday
Second Friday
Third Friday
Fourth Friday

Technical Forum, Pittsford Library
Speaker or Program, Brighton Town Hall
Business Forum, Pittsford Library
Speaker or Program, Brighton Town Hall

For more information, visit **www.rochesterconsultants.org**.

Entrepreneur
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Gala **Tuesday, April 21, 2015**

25th Anniversary
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RPCN

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EMCEE: Rachel Barnhart, Channel 8 News Reporter
KEYNOTE SPEAKER: General John Batiste

6:00-7:00 pm Cocktails
7:00-10:00 pm Dinner Reception & Awards Presentation

\$25.00 RPCN members \$30.00 Non-members Cash Bar
RSVP for Gala by Friday, April 10, 2015
Register online at www.RochesterConsultants.org

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