

One on One Coaching Log and Outcomes Form

Meeting Date _____

Entrepreneur Name: _____

Business Coach Name: _____

Contact Type- Office Visit ___ Site/Home Visit ___ Telephone ___ Written ___

Meeting Start Time ___ **Meeting End Time** ___ **Duration of Meeting** ___

Technical Assistance Type

Credit related

<input type="checkbox"/> Access to Markets	<input type="checkbox"/> Personal Credit
<input type="checkbox"/> Audits and Site Visits	<input type="checkbox"/> Loan Application
<input type="checkbox"/> Business Plan Consulting	<input type="checkbox"/> Business Site Visit
<input type="checkbox"/> E-Commerce Assistance	<input type="checkbox"/> Business Plan
<input type="checkbox"/> Financial Management	<input type="checkbox"/> Outreach to lenders
<input type="checkbox"/> General Business Advising	<input type="checkbox"/> Loan Packaging
<input type="checkbox"/> Information & Technology	<input type="checkbox"/> Loan Guarantee
<input type="checkbox"/> Legal & regulations	<input type="checkbox"/> Delinquency Counseling
<input type="checkbox"/> Mentoring	<input type="checkbox"/> Delinquency Monitoring
<input type="checkbox"/> Operations	<input type="checkbox"/> Other Credit related TA
<input type="checkbox"/> Personal Development	
<input type="checkbox"/> Product Development	
<input type="checkbox"/> Tax Assistance	
<input type="checkbox"/> Other	

Notes From Meeting

Success Anecdote *(Please describe below)*

See Reverse Side to Report Business Outcomes →

RTC Business Development Outcome Form

New Business Started

- Start date (Date of first sale): _____
- Business Name: _____
- Business product/service: _____

Job(s) Created FT: # _____ PT: # _____ Temp: # _____

Business Expanded _____

Business Strengthened (existing businesses only)- Check Outcomes
(Tangible completed projects established or significantly enhanced with TA from RTC which will directly contribute to the growth and long-term sustainability of a client's business)

Business Planning

- Identify Product/Service
- Identify Target Market
- Identify Production/Delivery
- Develop Pricing Strategy
- Create Revenue Model
- Decide Business Structure

Financial Planning

- Start-Up Budget
- Monthly Budget
- Break-Even
- 12-Month Cash Flow Projections
- Historical Analysis & Recommendations
- Sales Projection
- Personal Budget
- Develop Credit Improvement Plan
- Business Financing Plan

Marketing

- Competitive Analysis
- Target Market Segmentation & Analysis
- Promotional Strategy
- Sales Plan
- Marketing Plan
- Pricing Strategy

Loan Packaging & Assistance

- Complete Loan Application Package
- Secure Loan – Amt- _____
From- _____

Core Infrastructure

- Business Registration/Licensing
- Complete Business Plan
- UEZ/MWB Certification
- Bookkeeping System
- Inventory Management System
- Business Bank Account
- Contact Management System
- Business Forms
- Domain Name Registration
- Set Up Email
- Business Cards
- Develop Business Contract
- Marketing Materials
Describe _____

- Website Developed
- Website Expanded
- Credit Card Processing
- Product Packaging
- Brand Identity
- Develop Logo
- Identify Business Location
- Secure Business location
- Store Design/Layout
- Time Management Plan

Other:(describe below)
