

HAVE YOUR OWN BUSINESS START-UP HOW-TO PRESENTATION PROGRAM

Presentations

Lengths: 1-2 hrs, 2-6 hrs, 6-18 hrs (6hrs/day)

Options:

- 1-2 hrs = overview with no appendices, Q&A
- 1-2 hrs = customized specialized focus with no appendices, Q&A
- 2-6 hrs = comprehensive overview with selected appendices, Q&A
- 2-6 hrs = comprehensive/specialized with selected appendices, Q&A
- 6-18 hrs = comprehensive with all appendices, hands-on, interactive, Q&A
- x hrs = customized

Section 1

Introduction

Truisms

Initial Considerations

- Objectives
- Viability
- Requirements
- Major Factors
- Funding

Section 2

Choosing the Product/Technology to Commercialize

- Market Niche
- Long-term Perspective
- Competition
- Marketing and Sales

Section 3

Creating the Legal Entity for Your Business

- State
- Type

Legal Formation Documents

- Bylaws
- Confidential Private Placement Memorandum
- Investor Questionnaire
- Operating Agreement
- Subscription Agreement
- Shareholders Agreement
- Stock Repurchase Agreement
- Stock Certificate Legend

Legally Protecting Your Idea, Product, or Service

- USPTO
- US Copyright Office

Evolution of the Structure of Your Business

- Board of Directors
- Stakeholder Conflicts
- Control and Dilution

Confidentiality and Non-Disclosure Agreements

Employee and Consulting Agreements

Legal Representation

Section 4

Initial and Ongoing Start-up Activities

- Vision Statement
- Mission Statement
- Strategic Plan
- Marketing Plan
- Business Plan

Organization Structure

- Job Descriptions
- Job Hierarchy

Section 5

Planning

- Importance
- Avoid the “Big Surprise”
- Investor Perspective
- Strength and Weakness
- Macro and Micro Perspectives
- Function Perspective
- Time and Cost Considerations
- Dual or Multiple Source Inputs
- Identify Key Milestones and Dates
- Use Money Efficiently

Section 6

Operations

- Administration
 - Executive
 - Coordination and Synchronicity
 - Mergers & Acquisitions
 - Strategic Planning
 - Legal
 - Finance/Treasury

Finance, Investment & Banking
Insurance/Risk Management
Asset Preservation and Protection Practices
Capital Planning and Procurement

- Human Resources
 - Personnel
 - Policies and Procedures
 - Compensation and Benefits
- Accounting
- Regulatory Affairs
- Government Relations
- Production
 - Equipment Capital Requirements
 - Cost of Production
 - Purchasing and Inventory Control
- Marketing/Sales/Pricing
 - Marketing
 - Sales
 - Pricing
 - Capturing and Retaining Customers

Section 7

Funding

- Family and Friends
- Grants
- Crowd Sourcing
- Investor Money
- Terms and Conditions/Valuation
- Creation of Wealth Example
- Investment Decision Based upon Objectives
- Leverage Knowledge from Experience
- Funding = Who You Know
- Funding Work Plan
- Investor Selection Criteria
- Investor Selection Process
- Funding Documentation: Promissory Note

Section 8

Good Information to Know

- Problem Solving
- Accounting 101
- Regulation
- Negotiations
- Presentations

- International Business

Other Resources

Final Comments

About the Author

About The Center for Entrepreneurs, Innovators & Growth

Definitions

Appendices

Appendix 1	Strengths and Weaknesses List
Appendix 2	20 Criteria for Business Opportunity Evaluation
Appendix 3	The Assessment Questionnaire
Appendix 4	Bylaws
Appendix 5	Investor Questionnaire
Appendix 6	Operating Agreement
Appendix 7	Subscription Agreement
Appendix 8	Shareholders Agreement
Appendix 9	Stock Repurchase Agreement
Appendix 10	Confidential Private Placement Memorandum
Appendix 11	Job Description
Appendix 12	Organization Chart
Appendix 13	Confidentiality Agreement
Appendix 14	Employment Agreement
Appendix 15	Consulting Agreement
Appendix 16	Business Plan Executive Summary
Appendix 17	Milestones
Appendix 18	Funding Preliminary Work Plan
Appendix 19	Investment Opportunity Evaluation Template
Appendix 20	Investor Selection Process Template
Appendix 21	Sample Promissory Note
Appendix 22	CEO/Owner Responsibilities List
Appendix 23	Combined Interactive Financial Projections
Appendix 24	Distinguishing Factors Communications Tool
Appendix 25	Talking Points
Appendix 26	Interactive Start-up Checklist
Appendix 27	Tips and Important Points