



Selection & Certification Criteria for TechSource: Commercialization Consultants

SBDC Directors, Counselors, Paid Consultants, and Volunteers: Acceptance as a Contract Colorado SBDC TechSource: Commercialization Consultant requires (1) completion of Selection Criteria, (2) interview with Program Lead, (3) agreement with SBDC principles and (4) completion of training program and reassessment. Contract consultants are tapped “as-needed,” which may range from frequent to intermittent requests.

Step 1: Selection Criteria

Submission of a resume, including the following Education/Experience information:

- Completed education (Bachelor, Master’s, Doctorate, etc.)
- Business experience, specifically as an owner/officer or manager/supervisor
- Subject matter expertise
- Business consulting experience
- Presentations given on relevant topics
- Affiliation with industry organizations; Attending professional development conference(s) pertaining to small business
- Written/published articles on small business topics
- Officer/board member of business-related non-profit organization (examples: Colorado Bioscience Association, Colorado Space Business Roundtable, Chambers, Rotary, Governors Small Business Council, etc.)

Step 2: Interview with Program Lead

Information collected during the interview:

- A. Business knowledge, education and/or relevant business experience meets the high caliber set by program
 - a. Depending on current client and consultant mix, specific industry and business functional specializations may be needed at a given time; others areas of expertise may already be well-served by current consultants or not a match for current client needs
- B. Prior experience consulting/mentoring entrepreneurs (preferred)
- C. Understanding and respect for entrepreneurship required; prior business ownership preferred, especially experience launching and building new venture
- D. Professional demeanor; positive and constructive attitude; ability to build rapport with clients
- E. Excellent listener; this is about assisting the client, not showing how good the consultant is
- F. Organized thinking process; client can learn much just from the manner the consultant assesses the business situation/challenges and looks for potential solutions
- G. Willingness and ability to adhere to “fingerprint” of Colorado SBDC TechSource: Commercialization
 - a. providing non-judgmental, objective guidance to business owners so that they work through the analysis to determine the outcomes and decisions themselves (teach to fish)
 - b. avoid “punching holes in business plan” approach sometimes used by incubators (simulating VC’s); SBDC is on the side of the business owner (though constructively candid about negative as well as positive aspects of situation)
 - c. avoid “bossing the client” approach sometimes used by seasoned executives (giving “the answer” and insisting that be followed); the business owner is taking the risk and needs

- d. willing to set objectives with the client and keep them on track to accomplish them
- H. Willingness and ability to adhere to SBDC principles and processes
 - a. complete confidentiality
 - b. high ethical standards
 - c. no selling/pitching of consultant's services
 - d. willing to request documentation, to provide reports for SBA and to track economic impact measures in timely manner
- I. Willingness to understand that the SBDC has constrained resources, high goals and is a fast-paced agile environment; understanding that staff (due to budget/time constraints) cannot provide a great deal of administrative support (and social interaction)
- J. Understanding that the SBDC answers to many "masters," especially the SBA – certain processes are required (and cannot be changed,) although we may all know of more effective ways to reach our objectives.

Step 3: Agreement to Follow SBDC Protocol

- A. Checklist of SBDC Consultant Forms and Information Needed (Confidentiality Agreement, Conflict of Interest Policy, "Consultant Model", Affidavit of Lawful Presence, Articles of Professional Behavior, In-kind Form)
- B. 4 (or 5) Online Training Modules
- C. Client paperwork
- D. Client Impact tracking
- E. Invoicing cycle

Step 4: Completion of Training Program and Reassessment

- A. Consultant will work with Program Lead for first 2-3 consulting sessions, typically following this format:
 - a. Program Lead leads meeting, consultant shadows
 - b. Program Lead and consultant share lead
 - c. Consultant leads meeting, Program Lead shadows
- B. After these sessions (and also after consultant works independently with clients,) Executive Director and Consultant touch base to confirm:
 - a. Consultant's continued willingness to follow SBDC processes
 - b. Consultant's choice of SBDC consulting model (Unlimited, 6-session, 3-session, 1-session)