



Join your cause.

**2009 COSE Small Business Conference**  
Speaker Proposal Instructions  
October 21-22, 2009  
I-X Center, Cleveland

The continuing goal of COSE is to provide an intensive educational learning experience that is relevant, practical, and engaging. We need experienced COSE members to submit proposals on predetermined workshop topics for the small business conference. The following instructions will assist you in submitting a proposal for consideration at the 2009 COSE Small Business Conference. The **deadline to submit your proposal is close of business on Monday, May 18 2009.**

**STEP 1 – VERIFY YOU MEET THE SPEAKER REQUIREMENTS**

Go to **www.cosespeaker.com** to determine if you meet all of the requirements to be considered eligible to be a COSE Speaker.

**STEP 2 – SELECT A WORKSHOP FOR YOUR PROPOSAL**

The COSE Small Business Conference Planning Committee has developed a list of predetermined workshops to be presented at the 2009 Small Business Conference. Within your area of expertise, please select the workshop(s) you would be interested in presenting. (*The list of workshops is included below*). You are also welcome to submit a proposal outside of the proposed content if you feel there is valuable information you can provide to our audience.

**STEP 3 – CREATE YOUR PROPOSAL**

Once you have selected a workshop, develop the details of your proposal. Your proposal must contain:

- 150 word bio
- Lists of areas of expertise
- Title of the presentation (*Please use the title selected from the predetermined workshop if applicable*)
- 3-4 goals/learning objectives of the program
- Must have three references that can be contacted

If available, submit one copy of handouts and/or PowerPoint presentation

- One copy of handouts that you will be distributing in the workshop
- One copy of PowerPoint presentation

**STEP 4 – SUBMIT YOUR PROPOSAL**

Once you have all of the materials needed to submit your proposal go to **www.cosespeaker.com**.

**Additional Information:**

- All proposals must be submitted through [www.cosespeaker.com](http://www.cosespeaker.com).
- You may submit more than one proposal, but you may only be asked to present one workshop.
- If you do not find a workshop that is within your area of expertise, you also have the option of creating a workshop of your own for consideration. If you submit your own workshop, you must still meet all of the speaker requirements and follow the above steps except step #2.
- **For additional questions contact Megan Kim, Director, Public Relations and Programs at [mkim@cose.org](mailto:mkim@cose.org) or call 216-592-2356.**

**STEP 5 – ANNOUNCEMENTS**

Selection of speakers with corresponding workshops will be announced on **Friday, June 5, 2009**. All notifications will be sent via e-mail by 5 p.m.

All selected speakers will be required to attend one of two conference orientations (date to be determined).

The following is a list of predetermined workshops to be presented at the 2008 Small Business Conference. Within your area of expertise, please select the workshop(s) you would be interested in presenting. You may submit more than one proposal, but you may only be asked to present one workshop.

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## I. Human Resources

### 1. **New Policies Under Obama Administration**

This session will provide an update on new regulations (workplace & people) that affect a small business today.

**Ideal Presentation Style:** Employment Law Attorney

**Level:** All Levels

### 2. **The Workplace Investigative Process**

This session will provide a step by step process to teach every employer how to conduct fast, ethical and effective workplace investigations.

**Ideal Presentation Style:** 1 Legal HR Expert

**Level:** Intermediate

### 3. **Motivating your people without throwing money at them.**

Learn how to identify, select and implement Effective Employee Training and various methods to motivate people, improve performance – moral & productivity with no money incentives involved.

**Ideal Presentation Style:** 1-2 people both with behavioral and or motivational training exp. **Level:**

All Levels

### 4. **Cost Effective Methods for Hiring Top Talent**

This session will review the benefits of strategic hiring as well as some of the challenges. We will discuss the process of identifying, recruiting and developing new employees. Information on background checks will also be provided.

**Ideal Presentation Style:** 1 person with exp. in staffing and O.D. (Organizational Development)

**Level:** Intermediate

### 5. **Improve Leadership – Behavioral Style Training**

What does “Leadership” mean today – Coaching! Leadership is an “ART” that is learned and improving communications internally & externally will improve your culture, your business and the bottom line.

**Ideal Presentation Style:** 1 person for each level – both have had hands on exp with behavioral style training

**Level:** All Levels

### 6. **Is your benefit package to much or too little for a small business?**

An overview of “bundled” benefit packages that small businesses offer as a comparison. Also, discussing the outsourcing of various HR services such as: Payroll, 401K’s, etc.

**Ideal Presentation Style:** Someone from the industry that offers these types of services and can give 1<sup>st</sup> hand information about usage and costs.

**Level:** Intermediate

### 7. **Taking Your Employees to the Next Level**

Whether the next level is within your company or not, this session will provide a step-by-step process that will help you coach the person to allow them to grow or make it easier to say goodbye. This session will also cover appropriate termination practices.

**Ideal Presentation Style:** 1 Professional with HR background + coaching exp + MBO methods knowledge

## **II. Money**

### **1. Show Me the Money – Access to Capital**

An overview of all financing options available to small businesses, including bank/SBA lending (yes, it really is possible to get a loan), government and foundation loans/grants (they exist but are hard to locate), and alternative/creative sources, this includes newly available funding as a result of the stimulus plan from Uncle Sam.

**Ideal Presentation Style:** Splitting it would allow three presenters to get involved as well as allow a more in-depth treatment of the topics. Or, maybe have three individuals that address each of the three topic areas as a panel in one session?

**Level:** All levels

### **2. Answers to Your Small Business Financing Questions.**

Should I buy or lease my equipment? How do I write a budget that is real? Or why do I need a budget if I never have any money anyway? Why should I borrow and how do I establish how much money my business needs? What incentives are available to the small company locally and from Uncle Sam? What is an ROI (Return on Investment) anyway? Am I benefiting enough from your banking relationship? These questions and many more relating to operating expenses will be addressed.

**Ideal Presentation Style:** One expert on this topic is needed

**Level:** Fundamental

### **3. Tackle the Downturn in the Economy by Adjusting Your Small Business Practices**

Are your clients moving their business overseas? Is your marketplace more competitive? Have you experienced longer payment terms while dealing with less cash flow? If this sounds like your business lately, here are some practical and creative ways to deal with the economic downturn, such as: engage and empower remaining employees to examine their practices with the objective of reducing waste and lowering costs, and much more.

**Ideal Presentation Style:** Maybe have a panel consisting of business advisors and small business owners relating some real examples of tactics that work.

**Level:** Fundamental

### **4. Doing Business with the Government**

Within this workshop, you will learn the ins and outs of government procurement. We will review the procurement process, business certification, proposal preparation and what happens once you get the bid.

**Ideal Presentation Style:** Government Procurement expert, Small Business Owner who has been through the process

**Level:** Intermediate

### **5. Using your Minority/Female/Disadvantaged Business Entity (MBE/FBE/DBE) Certification to Your Advantage.**

Learn how, where and why to certify. Where can you find organizations that seek certified entities to work with? Think about shifting from the well established FBE/MBE/DBE to the new SBE certification – how and why to do this? Also, learn about certification limits when a small business grows up.

**Ideal Presentation Style:** A panel consisting of a certifying entity (like City of Cleveland certification manager), a business that seeks certified entities (like MetroHealth Hospital) and a certified business that has reaped the benefits of certification

**Level:** Fundamental

### **6. Estate/Succession/Retirement Planning for the Small Business Owner**

You've spent a lifetime building your business; now find out how to continue to benefit from your business after you stop working in it. Also, learn financial planning strategies you should put into place early on to get the most out of your succession strategy.

**Ideal Presentation Style:** An expert on the topic is needed

**Level:** Intermediate

#### 7. **Credit and collections practices.**

This session covers the best practices and recommendations for accounts receivable, setting credit policy, invoicing, internal collections and use of third-party collectors.

**Ideal Presentation Style:** An expert on the topic is needed

**Level:** Fundamental

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### **III. Technology for Small Business**

#### 1. **Social Media Basics**

Objectives: Introductory course on the major Social Media websites (LinkedIn, Facebook, Twitter, video). Why/how should they be used? What are the pros/cons of each? How do you set up a profile? What security issues are there?

**Ideal Presentation:** Individual expert or panel of experts on different subject matter

**Level:** Fundamental

#### 2. **Virtual Office Effectiveness**

Objectives: What systems, software and equipment are needed to function effectively as a Virtual Office (e.g., telecommute or single office)? How can my business project the image of a larger business? If I need to work with others (e.g., employees, co-workers, clients), how can I share communications, documents, etc.? How can I access data remotely?

**Ideal Presentation:** Several individual experts with different subject matter

**Level:** All Levels

#### 3. **Customer Relationship Management – What's Best for your Business and Why?**

Objectives: Overview of CRM software package options. Which are best for different types/sizes of businesses? This will be an in-depth discussion of costs, features, benefits, advantages, limitations, etc.

**Ideal Presentation:** Panel

**Level:** All Levels

#### 4. **Tips & Tricks / Microsoft Office Applications** (Outlook/Word/Excel/PowerPoint/Publisher/Access)

Join us for an intermediate level training discussion on the best ways to use these applications with primary emphasis on Outlook, Word and Excel.

**Ideal Presentation:** Individual or panel of experts on different subject matters

**Level:** All levels

#### 5. **Creating An Effective Online Presence:**

This workshop will review using websites, blogging, newsletters, emails, ecommerce and their value in growing a business and making the business more effective.

**Ideal Presentation:** Individual presenter

**Level:** Fundamental/Intermediate

#### 6. **Free and Low Cost Tech Applications**

What applications (software) are available that can help you and your business be more productive? What makes sense for different sizes and types of businesses?

**Ideal Presentation:** Panel of experts

**Level:** Intermediate

7. **Security / Remote Storage / Backup / Equipment & Apps**  
Review of options (cost, features, etc.) to maximize security while minimizing disruption. Learn about data protection strategies, programs and products to keep your technology protected.  
**Ideal Presentation:** Individual expert  
**Level:** All levels
  8. **Latest Technology – Equipment / Hardware / Software**  
This session will provide an overview of current products and trends. Learn how to maximize productivity and efficiency with new technologies like the Blackberry and iPhone. We will also delve into the future of technology hardware and what's to come.  
**Ideal Presentation:** Individual expert or several individual experts with different subject matter  
**Level:** All Levels
  9. **What to do When Your Technology Doesn't Work**  
We have all been there, you are on deadline with a client and your computer freezes. What do you do? How do you recover, who do you call, how do you continue to get your work done efficiently and effectively? This session will address issues related to all your technologies – phone, email, computer, fax machine, etc.  
**Ideal Presentation:** Technology Hardware Expert  
**Level:** All Levels
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#### **IV. Sales and Marketing**

1. **How to use Social Networking to Benefit Your Business**  
Learn how to use Social Networking to develop new sales and marketing tactics for your business. This session will cover generating leads, making connections and how to use these connections to your benefit.  
**Ideal Presentation Style:** Panel of Social Media Experts  
**Level:** Intermediate
2. **Effective Email Marketing Tactics**  
Within this session, we will review the tips and tricks for the best email marketing campaigns. Learn best practices for design and content, how to use email marketing services (such as Constant Contact), how to avoid the spam bucket, and compliance issues with the CAN-SPAM Act.  
**Ideal Presentation Style:** Email Marketing Expert  
**Level:** Intermediate
3. **Driving traffic to your web site**  
Techniques to get visitors to your site, including search engine optimization and sponsored advertising.  
**Ideal Presentation Style:** Web SEO Expert  
**Level:** Intermediate
4. **Developing a Results Driven Website**  
Once I have visitors to my site how do I keep them there? What are my objectives and does the design of the site support them? Considerations include performance (response time), visual appearance, navigation and on line purchasing (shopping carts).  
**Ideal Presentation Style:** Web Development Expert  
**Level:** Intermediate
5. **Traditional Advertising and Promotions Methods**  
Let's not forget that there are approaches that do not rely on the internet. This workshop will review effectiveness and costs of traditional methods – direct mail, print and broadcast advertising, trade shows, promotional products, etc. and when and why to use them.

**Ideal Presentation Style:** Sales and Marketing Expert

**Level:** All Levels

**6. Today Everyone Has to Sell**

Business owners and other professional employees of smaller companies are often required to be sales people. What do they need to know to be more effective in that role?

**Ideal Presentation Style:** Sales Professional

**Level:** All Levels

**7. Lead Generation/New Business Development**

What are the best methods for generating new prospects or business relationships? Is cold calling appropriate for your business? What are effective ways of doing it?

**Ideal Presentation Style:** Expert on lead generation/prospecting

**Level:** All Levels

**8. Building a brand**

What is a brand? Do I need to brand my business? What is required to build and maintain a brand identity for a new business? When should I consider "re-branding"?

**Ideal Presentation Style:** Branding Expert

**Level:** All Levels

**9. Customer Relationship Management tools**

Do I need CRM software for my business? How can I use it to manage current and prospective customers? How do I get my team on board to use the system?

**Ideal Presentation Style:** CRM Expert

**Level:** Intermediate

**10. Effective networking**

How do I get the most out of a networking event – deciding which events to attend, what to do at the event, and how to make the biggest impact.

**Ideal Presentation Style:** Networking Expert

**Level:** All Levels

**11. Overcome Gatekeeper Barriers and Get to Your Target Prospect**

Like most professionals, you probably run into gatekeeper roadblocks on a daily basis. Sometimes it seems like every time you try to make contact with an executive or decision maker you are stopped right in your tracks. The difference between an average performer and a top performer is not that they break through the roadblocks better, they have learned how to appreciate the role of a gatekeeper and the best way to communicate with them. This workshop will look at how you can overcome gatekeeper barriers, catapulting your business and career.

**Ideal Presentation Style:** 1 Person: Sales consultant or expert on topic

**Level:** All Levels

**12. Tradeshows - Successful Sales and Marketing Techniques**

Tradeshows can help drive dramatic business growth if executed correctly. Unfortunately, most organizations don't properly plan and execute effective tradeshow practices and the tradeshows end up a cost center instead of a profit center. In this workshop you will learn how to handle pre tradeshow marketing, tradeshow setup, sales team support, tradeshow management and the follow-up to increase your tradeshow success.

**Ideal Presentation Style:** 1 Person: Tradeshow consultant and expert

**Level:** All Levels

**13. Creating and Developing a High Performance Sales Strategy in This Economy**

Whether your sales force is one person or a full sales staff, it is important to implement solid strategies, initiatives and goals to keep your business in the spotlight. What are the characteristics of

high sales performers?

**Ideal Presentation Style:** Sales Development consultant or Expert

**Level:** All Levels

#### **14. Guerilla Marketing/Viral Marketing**

Guerilla marketing is an unconventional system of promotions that relies on time, energy and imagination rather than a big marketing budget. Typically, guerrilla marketing tactics are unexpected and unconventional. Learn how you can use these strategies for your business.

**Ideal Presentation Style:** Guerilla Marketing Expert

**Levels:** Intermediate

#### **15. How to do Business Outside Your Local Market**

In this session, you will learn to expand your reach to begin working with clients and prospects outside Northeast Ohio. How do you strategize that reach? Once you develop relationships, how do you maintain and nurture them when clients may not be right in your backyard?

**Ideal Presentation Style:** Panel of marketing strategist and businesses who have found success outside of Cleveland +

**Level:** Intermediate/Advanced

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### **V. Personal and Professional Development**

#### **1. Post Networking—"I got the business card—NOW what do I do?"**

You went to the networking event, met new people, and got lots of business cards for potential business – now what? We all get those blind copied "nice to meet you" e-mails which we ignore. This workshop will let you know how to follow up in a creative and attention getting manner. Phone calls, social networking sites, effective e-mails, direct mail –learn the most effective way to turn business cards into sales!

**Ideal Presentation Style:** 1 speaker who is not speaking on usual "elevator speech"

**Level:** Intermediate

#### **2. Stress Prevention and Reduction in the Workplace**

Different facets of our business day bring different types of stress. Finance, dealing with employees, vendors, deadlines, etc. There are many seminars on stress management. This workshop will give you ideas to avoid getting into those stressful situations in the first place. Subjects like time-management, delegating, setting reasonable time frames for projects, setting expectations for employees and more.

**Ideal Presentation Style:** Panel with moderator

**Level:** All Levels

#### **3. Strategic Pro Bono**

The business owner has achieved a significant level of success, and has connected with a great number of other owners and area leaders during her time in business. The objectives of this workshop might include: Investigating and evaluating volunteer opportunities in a strategic fashion, deciding on a portfolio of community and professional activities that would match the owner's interests, as well as serve the long-term success of the business, and understanding and learning how to pursue volunteer options that will increase the owner's influence on outcomes in the community

**Ideal Presentation Style:**

- Recommend this be led by one senior community leader who is very familiar with the influence/power structure in NEO, and who is seriously committed to the philosophy and practice of inclusion (perhaps two, if there are significantly different perspectives).
- Suggest at least a portion of the workshop be interactive, to be able to focus on the individual situations of the attendees.

**Level:** Intermediate

#### 4. **Prioritizing Your Time**

The business owner has read and tried various basic tactics to manage his time in a better fashion, yet he needs to get to the next level of success in managing his business and his time. The objective of this workshop might include: familiarization with the several general options available, learning which option(s) best serve the different personality/characteristics of leaders – perhaps include a reprise of how some of the best successful business people prioritize their time, and leaving with information that will allow the attendee to implement their preferred system immediately

##### **Ideal Presentation Style:**

- Recommend this be led by a senior level OD or Leadership consultant.
- Suggest at least a portion of the workshop be interactive or have exercises, so the individual attendee can leave with a “custom” tailored plan.

**Level:** All Levels

#### 5. **How to Lead Effective Meetings that Get Results**

The business owner or senior executive understands that bringing staff together in meetings can sometimes be the best way to create progress. Yet, so little seems to be accomplished in meetings. The objectives of this workshop might include: understanding the basics of group dynamics and the different learning styles that people have, learning and practicing a number of strategies and tools designed to produce effective meetings

##### **Ideal Presentation Style:**

- Recommend this be led by a senior level, trained meeting facilitator.
- Suggest the workshop focus heavily on tools, templates, etc.
- Include practice time for the attendees.

**Level:** All Levels

#### 6. **Life Long Learning for Entrepreneurs...Is not Optional**

A lively and interactive discussion blending lessons learned and best practices for relatively new entrepreneurs/business owners/ leaders or those who haven't committed much time planning their continuing professional development. Objectives include: learning new options for entrepreneurs to continue enhancing the skills and knowledge necessary to grow as a professional and a business owner/leader, review of existing options for ongoing professional development, and motivation to take advantage of inexpensive and convenient options provided locally and on-line.

##### **Ideal Presentation Style:**

- Recommend a panel discussion, managed and moderated by one of our Sub-Team members.
- One panelist – from COSE, highlighting MindSpring, MindShare and all the learning experiences available to members.
- One panelist – from the local university professional development field, highlighting the half-day, one-day and longer non-credit workshops available at all colleges and universities in the region.
- One panelist – from a major local professional association, highlighting educational resources available from major associations, both locally and on line.

**Level:** All Levels

#### 7. **De-clutter Your Life & Workspace**

A lively and interactive discussion blending lessons learned and best practices for those entrepreneurs/business owners/leaders that have operated a small or home-based office long enough for it to be an inefficient and cluttered workspace. Objectives may be: objectively examining the efficiency and effectiveness of office resources, tools, organization strategies and information management techniques, identifying specific sources of 'pain' and personal value for reducing that 'pain', examining contemporary techniques and strategies for maximizing workspace and workplace efficiency and motivation to put some of these new ideas to work.

##### **Ideal Presentation Style:**

- Recommend a panel discussion, managed and moderated by one of our Sub-Team members.
- One panelist – a time management practitioner/expert who can comment on workplace organization.
- One panelist – a certified or experienced professional organizer.
- One panelist – a COSE member who considers that his or her workspace is well organized and efficient.

**Level:** Intermediate

#### 8. **Preparing to Take the Next Step in Your Career**

Whether you are laid off, lost your business or simply lost the passion for your current career, it is important for professionals to be prepared to take the next step to develop themselves and their careers. How and where do you start? How do you develop the best opportunities for yourself?

**Ideal Presentation Style:** Career Development Expert – resumes, interviews, etc.

**Level:** All Levels

## VI. Sustainability

### 1. **Energy Efficiency for Small Business**

Learn how small businesses can improve their energy bottom line. This session will provide low and no-cost energy efficiency projects and access to capital and discuss incentive programs (utilities and tax incentives).

**Ideal Presentation Style:** Energy Efficiency Expert

**Level:** All Levels

### 2. **Implementing Sustainability Practices into Your Small Business**

This panel discussion to include: an overview of sustainability topics and terminology, ways to save with sustainability, and access to capital, tax incentives and economic benefits for your business. We will also focus on how and why small businesses be sustainable in the current economic environment, explain sustainability as “cost stabilization”, not just environmental stewardship and the future of sustainability – what is coming down the pike.

**Ideal Presentation Style:** Small Business using sustainable practices for success, sustainability authority

**Level:** All Levels

### 3. **Sustainability for those Leasing Space– what can a leaser do to help their (triple) bottom line**

How can small businesses who lease business space still benefit their Triple Bottom Line through sustainability? Try options such as negotiating your lease. Learn how going green can benefit both tenants and building managers, low and no-cost projects, utilities, recycling and waste removal, repairs and improvements, etc.

**Ideal Presentation Style:** Expert on sustainable practices for tenants

**Level:** All Levels