



2011 COSE Small Business Conference
Speaker Proposal Instructions
October 19-20, 2011
I-X Center, Cleveland

The ongoing goal of COSE is to provide an intensive educational learning experience that is relevant, practical, and engaging. We are looking for experienced COSE members to submit proposals on predetermined workshop topics for the 2011 COSE Small Business Conference. The following instructions will assist you in submitting a proposal for consideration at the 2011 COSE Small Business Conference. The **deadline to submit your proposal is close of business on Tuesday, May 23, 2011.**

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 Task Team has developed a list of predetermined workshops to be presented at the 2011 Small Business Conference. Please select the workshop(s) you would be interested in presenting that fall within your area of expertise. (*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 that is missing from the list.

STEP 3 – CREATE YOUR PROPOSAL

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

- ✓ 150 word bio
- ✓ List 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
- ✓ One copy of handouts that you will be distributing in the workshop
- ✓ One copy of PowerPoint presentation

All proposals must contain all of the above for consideration during the review process.

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.
- ✓ 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, Education and Programs at mkim@cose.org or call 216-592-2356.

STEP 5 – ANNOUNCEMENTS

Selection of speakers with corresponding workshops will be announced on **Friday, June 10, 2010**. All notifications will be sent via e-mail by 5 p.m.

The following is a list of predetermined workshops to be presented at the 2011 COSE Small Business Conference.

- I. Marketing
 - II. Sales
 - III. Human Resources and Legal
 - IV. Technology for Small Business
 - V. Social Media
 - VI. Money
 - VII. Personal and Professional Development
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I. Marketing

1. **Workshop Topic:** Big Business Marketing on a Small Business Budget
Description: You have a plan and a budget. Yet, things are tight and you need to get the word out. How can you appear bigger than you really are to your customers? Can you DIY to save money and still appear professional? Should you? When is it time to ask for help from a professional? What should you expect to pay for their services? Our expert presenter will answer these questions and help you get your marketing plan the attention it deserves without breaking the bank.
Level: Beginner/Intermediate
2. **Workshop Topic:** Market Research
Description: Within this workshop, you will gain an understanding on how to target industries for new customers, market for a new product or new market entry of an existing product. We will also review the best way to create a prospect list to increase sales and how to learn more about a potential customer for increased sales or competitor for strategy formulation. You will learn how Market Research can help you identify your target audience and how surveys can be helpful to your marketing strategy
Level: Intermediate
3. **Workshop Topic:** Branding your Business – Getting your Message Right!
Description: Are you the Leader of the Wolf Pack? Does your idea or product grab your audience? This workshop will help you define and answers those questions from a marketing perspective. Our expert presenter will share ideas on how to brand your business – and set your business apart from the ordinary. Learn how to make your message unique and extraordinary!
Level: All
4. **Workshop Topic:** Developing a Marketing Plan 101 (Part 1)
Description: You've got a great idea. Yet, without a plan and goals, your great idea might never be heard by the people who need it most. This workshop and panel discussion will help you start from the beginning to establish your Marketing Plan. We'll show you how to put it on paper, create a goal oriented implementation plan, establish a marketing budget and more. Our panel of experts will help guide you through real life scenarios and experiences that will assist you in getting your Marketing Plan off to a great start.
Level: Beginner
5. **Workshop Topic:** Developing a Marketing Plan 202 – (Part 2)
Description: You have a plan – now what? This workshop builds on the basics. We'll help you determine how and when to implement your plan, where you can go for help, basic marketing tools and different marketing techniques such as electronic vs. conventional non-electronic. Bring your plan and your questions for our panel of experts and real business owners. They will share their stories and suggestions to help get your idea off the drawing board and into the real world.
Level: Intermediate
6. **Workshop Topic:** E-mail Marketing Tactics & Strategies for a Successful Campaign
Description: E-Newsletters remain important tools in building a relationship with potential customers and establishing relationships with potential customers. Learn E-Newsletter best

practices and how to build an E-mail campaign. Get an overview of e-mail services available such as Mailchimp and Constant Contact. Learn how to avoid the dreaded Spam Filter and get your e-mail message opened. At the end of this workshop, you will have the basic tools you'll need to slide past the spam filter and give your marketing strategy a cyber shot in the arm!

Level: All

7. Workshop Topic: Is Your Marketing Plan still working for you?

Description: Just because it worked once, doesn't mean it continues to work today. It may be time to review and revise your plan. It doesn't take long for the market place to change and if you don't change with it, you'll be left behind in the dust. This workshop will help you assess your current Marketing plan and determine if it IS still working for you.

Level: Intermediate and advanced

8. Workshop Topic: Bringing Back Traditional Marketing Techniques in 2011

Description: Social media and e-newsletters are popular and cost effective ways to advertise a business in 2011. However, don't stop using traditional methods of selling such as newsletters, brochures or postcards as a way to advertise your business. It's time to hit the streets and have some face time with your potential customers. This workshop will help you learn the best ways to get your foot in the door, make appointments and how to get to the real decision maker. Not an easy thing! These techniques have worked for years and we'll combine the old with the new to teach you some marketing tricks for success.

Level: All

9. Workshop Topic: Using your Sales & Marketing Skills to Target Customers

Description: Which came first – sales or marketing? This workshop will help you define the skills you need for a successful sales and marketing campaign. Learn what the difference is and how you can use them alone and together to grow your business. Do your sales skills enhance or hinder your marketing strategy? We'll help you hone your skills to target your customers and grab their business. Learn effective methods of interviewing customers so you can uncover the real business issues and needs of the customer and then position your products and services as their logical choice. Position yourself as an industry expert and consultant.

Level: All

10. Workshop Topic: Do you need a Website?

Description: How many times have you been asked, "What's your Website"...and you don't have an answer? Learn the benefits of starting your own website and your options for getting started. Find out how this very important tool can equal immediate benefits for your business.

Level: Fundamental

11. Workshop Topic: Using Your Website to Market Your Business

Description: Does your website convey your core message and what does your website say about you? Is it time to update your website? This workshop will present options for Search Engine Optimization, driving business to your site, updating your website or tearing it down and starting fresh. We'll give you the tools to help make those choices, as well as, options for website development from DIY to Professional and who should you use to create your site and how much should it cost?

Level: Intermediate

II. Sales

1. Workshop Topic: Cold Calling Strategies and Tactics

Description: Cold calling can be an effective sells technique. However, there are specific strategies that need to be used. Learn successful strategies and tactics to be used in making cold calls. Gain an understanding that there is so much more to cold calling than picking up a list and the telephone.

Level: All levels

- 2. Workshop Topic:** Customer Relationship Management (CRM) Basics
Description: This session is an introduction to CRM: what is it, how it works, and the benefits it offers. Learn current challenges CRM presents in use and implementation and considerations in selecting a platform. The discussion is technology-neutral and not specific to any CRM software product.
Level: Basic
- 3. Workshop Topic:** Developing and Practicing a Winning Sales Process
Description: The selling cycle is not a freewheeling process. It is measured, organized and contains distinct segments and procedures. Although it may seem that top sales people are just "naturals", they are following a well thought out process that moves the customer from first call introduction to closing. Learn the steps that make up the sales process, how to use each step in this process and how to leverage this process for more successful selling. Learn the importance of pre call planning, call objectives and how to conduct joint sales calls with reps or distributors.
Level: All
- 4. Workshop Topic:** How to Manage the Sales Force when the Sales Force is YOU
Description: Being a one or two person shop means that you are the sales force. How do you manage the sales along with your other responsibilities? Learn how to be an effective salesperson as a business owner. Participants will start to create a sales strategy and establish how it will be evaluated.
Level: Foundation or Intermediate
- 5. Workshop Topic:** Mapping the Customer's Organization
Description: You have been calling on your customer for weeks, perhaps months, and you think you have developed a solid relationship with the decision maker. Unfortunately, the customer selects a different supplier and you then realize you were not talking to the real decision maker. The real organization did not match the apparent organization and you did not consider the politics inside the customer's company. Learn how to map the customer's organization to insure you are dealing with all the stakeholders and also the proper stakeholders in the decision process. Learn how to develop the proper opportunity assessment that recognizes internal politics, personalities and overall conditions that reside inside your target customer.
Level: All
- 6. Workshop Topic:** Sales force strategies, defining, managing and motivating your sales team.
Description: You have a good sales team and they are growing top line revenue but could they be producing at a higher level. Perhaps your sales team is experiencing a high degree of turnover or you are having a difficult time attracting the caliber of associate you need to grow your sales. Learn how to recruit and assemble a high caliber sales team. Learn what motivates a sales person, how to retain the best sales people and how to design motivational strategies and implement the tactics that attract and retain top quality people that will provide the sales growth you are seeking.
Level: All
- 7. Workshop Topic:** Sales Process Focus: Defining a Lead Generation Strategy
Description: This session will focus on defining a Lead Generation Strategy that helps develop measurable Lead Generation goals leading to successful acquisition of ideal prospects
Level: Intermediate
- 8. Workshop Topic:** Sales Process Focus: Handling Objections
Description: Objections are a natural part of the sales process. Effective sales people are skilled at anticipating, avoiding and responding to objections raised by their prospects. This session will address some of the basic principles related to objection handling.
Level: Basic
- 9. Workshop Topic:** Sales Process Focus: Lead Qualification
Description: You have a list of leads, now what? This session will help you focus on Leads with the most potential for conversion with lead qualification and opportunity ranking tools.
Level: Basic

10. Workshop Topic: Sales Process Focus: Negotiation Skills

Description: This is a general session on negotiation techniques, not limited to sales closing situations. Negotiation skills are useful in all aspects of businesses as well as in an individual's personal and professional life. In any purchasing situation both the buyer and the seller can benefit from negotiation skills. Since this is a very broad topic the session will focus on specific essential negotiating skills as selected by the presenter.

Level: All

11. Workshop Topic: Sales Process Focus: Developing an effective Sales Reporting Strategy

Description: This session will guide attendees through the process of developing a Sales Reporting Strategy that provides senior management and the sales management team with methodology and the tools to establish sales goals, track activity and results for each sales team, and assess/coach team members.

Level: Basic

12. Workshop Topic: Sales Process Focus: Pricing as part of the Sales Strategy

Description: This session will focus on helping you understand the true cost of producing your product and how to use common pricing methods to develop a pricing strategy that will work for you.

Level: Basic

III. Human Resources and Legal

1. Workshop Topic: Get It In Writing

Description: Making sure you have policies and contracts in writing that cover: your services, Alternative Billing, and Collections so you can concentrate on revenue generation. This workshop should cover - Service Contracts: key clauses, when you need them, enforcement with clients, Alternative Billing arrangements that work, retainers, collections without jeopardizing business relationships. Envision this to be 75 minute session with a possible workshop style with different clauses for contracts that attendee can pick and choose and be on their way with a good draft contract that meets their needs. Then off shoot topics on alternative billing and collections. This session will take the small business owner through the entire contract process, from drafting, negotiating costs and collections.

Level: Intermediate

2. Workshop Topic: What you Need to Know Before Your Grow

Description: This workshop covers what you need to know and have in place before you hire - Reviewing resumes, sub-contractors versus employees, what is appropriate for each, what are the benefits and risks for each, payroll system, employee manual and policies handbook.

Level: Fundamental

3. Workshop Topic: Effective Hiring Techniques

Description: It's important to be sure you are using the right methods when interviewing candidates for a job. Is attitude or aptitude more important? What questions should I ask? What options are available to help me... testing for the best "fit" or just simple pre-employment screening? Finding the right person who fits your culture can be challenging. Learn what you can do to make better hiring decisions during this interactive learning session. In this workshop we explore the methods that work the best for finding and hiring the best.

Level: Intermediate

4. Workshop Topic: The Value of Preserving Company Records and History

Description: Learn about the development of policies for paper and electronic record keeping, how to retain, what to retain and the risks associated with not having a policy or having a policy and not adhering to it (litigation and audits). Information will be shared regarding services that archive digital records and online (social media) activity, as well as offline alternatives.

Level: Intermediate

5. **Workshop Topic:** Is your Employee Handbook Working for or against you?
Description: Having a substantial and relevant employee handbook can keep a company out of trouble and future litigation. This workshop should cover the aspects of an effective handbook including essential clauses, optional clauses, new sections business owners might not be thinking of (i.e.: social media). This workshop will leave the attendees with a clear idea of what they need for their business as well as where to find examples or assistance with creating one.
Level: Intermediate
 6. **Workshop Topic:** Motivating Employees with Non-monetary Rewards
Description: Keeping good employees is paramount for today's small business owner. It can also be challenging when dealing with tight cash flow. This workshop should address innovative and impactful ways small business owners can motivate and incentivize their employees that do not cost a lot and don't include pay raises.
Level: Intermediate
 7. **Workshop Topic:** Legal Compliance Issues Every Business Needs to Know
Description: This workshop will provide the attendees with information regarding legal tools they should be sure to have in their business. The presenter will share the reasons for the tools, how to obtain them, and when it's necessary to enlist the services of an attorney.
Level: Beginner to Intermediate
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IV. Technology for Small Business

1. **Workshop Topic:** How to Prepare for the Inevitable Crash -- Securing Your Small Business Data
Description: Learn the pros and cons about off-site storage, how it works and when to use it. This workshop will help businesses identify the best methods and choices for backing up files and keeping all information secure.
Level: Intermediate/Advanced
2. **Workshop Topic:** Telecommunication Options -- Landline, Voice over IP, Cell, Skype
Description: Learn how to efficiently use these communications tools independently and together to make communications simple. We will review the benefits of each option and how you can use each to create a more productive work environment for both you and your clients.
Level: Intermediate/Advanced
3. **Workshop Topic:** Maximizing Technology While Minimizing Costs
Description: As computers get smaller and more mobile, learn how desktop thinning has a positive impact on your bottom line. Understand your relationship with technology and make a plan for technical support.
Level: Intermediate/Advanced
4. **Workshop Topic:** What's Hot in Tech and What's Not
Description: Learn the various terminologies, new technology and what works best for your business environment. Find out about new tools on the way that may expand the way you communicate with customers via technology.
Level: Intermediate/Advanced
5. **Workshop Topic:** Working in the Cloud - Accessing Your Information from Anywhere
Description: This session will review how internet applications and online data storage can make you work in real-time from anywhere. Expanding your knowledge on this topic will allow you to deliver service to your customers from anywhere and any time.
Level: Intermediate/Advanced
6. **Workshop Topic:** Software or Hardware, What Should your Next Upgrade Be?
Description: Learn when to upgrade and if the change should come within your software or hardware.
Level: Intermediate/Advanced

7. **Workshop Topic:** Website Analytics and How It Helps
Description: Measuring your website and e-marketing impact and then doing something about it is of great value to any business. This workshop will help you to understand the success or failure of your online marketing presence.
Level: Intermediate/Advanced
 8. **Workshop Topic:** Backlinks – What Are They and How They Can Build a Trail to Your Business
Description: Backlinks are a great way to build SEO ranking and an important component of your blog and article marketing efforts. Learn more about these links, where and when to use them to maximize your web presence.
Level: Intermediate
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V. Social Media

1. **Workshop Topic:** Building a Consistent Social Media Brand
Description: Learn the tools and techniques to customize Facebook, Twitter, blogs, E-mail campaigns to build a consistent brand message over various Social Media platforms. Session should cover the specs to upload graphics to various Social Media sites and best practices on graphics, profile pictures and other images. Session should provide a shopping list of ideal graphics/images to have as well as resources to obtain these resources. (For example what are the dimensions needed for a Twitter background, what is the ideal layout and where can I go to have a Twitter background created for my company).
Level: Advanced
2. **Workshop Topic:** Measure and Monitor Social Media – tracking the conversation
Description: Learn tools and techniques for tracking your brand and reputation on social media sites such as Twitter, Facebook and blogs including what to track and how to track as well as when and how to respond. The workshop includes a step-by-step example of Google Alerts, Facebook Insights and available Twitter tools.
Level: Intermediate
3. **Workshop Topic:** Planning your social media strategy starting with “Why”
Description: We will discuss and define your goals for your social media activity to clearly articulate WHY you want to be in the social media environment. Whether you have extensive experience or none, it’s about creating a marketing strategy to put it all together. After all, is there any other reason to invest in social media other than marketing?
Level: Fundamental
4. **Workshop Topic:** Social Media Best Practices for B2B
Description: Hear about social media best practices and success stories for B-to-B businesses. The workshop will include a behind-the-scenes look at the goal, the plan, the implementation and the results of a B2B biz that used Social Media to gain new business.
Level: Intermediate
5. **Workshop Topic:** How to Use Video to Market Your Business
Description: Video is quickly becoming a popular and creative way to get your message out to current and potential customers. Learn how to get beyond the intention and take action to post content on YouTube including WHY it’s beneficial to be on YouTube (the second most popular search engine). Determine how to integrate video into your Social Media plan and identify video ROI. We will also touch on ideas for content.
Level: Fundamental
6. **Mastering LinkedIn**
Description: Take your use of LinkedIn to the next level. Learn to utilize LinkedIn for Business Development. Review groups, events, applications and more. Learn the steps to optimize your profile to reach the top of LinkedIn search results and manage and build relationships online through LinkedIn.
Level: Fundamental

VI. Money

- 1. Workshop Topic:** How to Access Capital in Today's Economy
Description: This workshop will provide an overview of all financing options available to small businesses, including bank, SBA lending, government and foundation loans, grants and alternative/creative sources. Learn both the benefits and risks as you look to gain additional capital for your business.
Level: Fundamental
 - 2. Workshop Topic:** Successful Succession Planning in Today's Business World
Description: 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. This session should also address any changes to small business taxation that may affect a retiring business owner.
Level: Advanced
 - 3. Workshop Topic:** How to Monitor and Improve Your Cash Flow
Description: This session will teach you the best strategies for record keeping and planning, forecasting, budgeting and managing cash flow. Learn how to use the most effective financial reports to help you best run your business and how to improve your business cash flow.
Level: Fundamental
 - 4. Workshop Topic:** How to Invest Like a Pro and Retire Early
Description: This session will teach you how to invest your hard earned income to prepare yourself for an early retirement.
Level: Fundamental
 - 5. Workshop Topic:** How to Get Investors Interested in Your Company
Description: You believe in yourself, your service and your commitment to your clients, but how do you convince others to invest in your business? Learn the best strategies to impress and prove yourself to potential shareholders. This session will also evaluate the risks and benefits associated with these investments.
Level: Fundamental
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VII. Personal and Professional Development

- 1. Workshop Topic:** Finding the Real Problem
Description: Learn the value of taking time to step away from your business, analyzing the frustration you may be experiencing and figuring out where it is actually coming from. There is great value to taking steps to get beyond yourself and your ideas. Get out of your own way and learn problem identification and solving,
Level: Advanced
- 2. Workshop Topic:** Time Management Skills and Strategies
Description: Observe the value of mapping out time for everything and everyone, ensuring you are accomplishing your goals and objectives, and understanding how to not over extend yourself, or over promise. Together we will explore time management concepts and skills required to increase personal and professional productivity. You will discover the true definition of productivity, where your time goes, the four quadrants of time, and how to set goals and write action plans to accomplish those goals. You will have the chance to assess your current situation and also look at what you might want instead.
Level: All Levels

- 3. Workshop Topic:** Networking for Success
Description: Networking is something we all do to support the growth of our businesses, but often without any clear plan or objectives. While social events can present networking opportunities, business networking events are work activities and deserve to be treated as such. The session will focus on networking strategies but not on specific techniques (such as preparing elevator speeches). You will learn how to network effectively, effective verbal and non-verbal communication, good listening skills, follow up, and referral.
Level: Intermediate
- 4. Workshop Topic:** Physical & Mental Wellness
Description: This workshop will show you how to incorporate wellness into your business life. Learn how helping yourself will help your business. Focusing on what truly makes you happy, what rejuvenates you, helping you to maintain a positive focus. Make your health a priority.
Level: Expert
- 5. Workshop Topic:** Are you an Entrepreneur?
Description: Establish the difference between owning a business and being an entrepreneur. Make the mind shift to be an entrepreneur. What makes an entrepreneur successful? What makes an entrepreneur who they are?
Level: Beginner/Intermediate
- 6. Workshop Topic:** Recognizing and Dealing with Different Customer Personalities
Description: Juggling the variety of personalities that your customers have can be challenging. Participants will learn how to recognize the many personalities that clients possess. Tips will be presented to assist with dealing effectively with those different personalities.
Level: Fundamental or Intermediate
- 7. Workshop Topic:** Multi-Generational and Diverse Relationships
Learn how to better understand people, your co-workers, and your clients in today's multi-generational and diverse environment. We will show you a more current way to view behavior, being that this is the first time in history that there are 4 generations in the workplace! Culture is one of the key components to a successful – or unsuccessful company. We'll talk about the elements of a positive culture and the steps to ensuring you have one. We'll explore what a positive culture looks like and how anyone within the organization can impact that culture.
Level: All Levels