



<b>Content Areas</b>	Small Business Startup
<b>Audience</b>	Everyone
<b># Modules</b>	10 Total
<b>Instructional Time</b>	:90 Minutes Each 15 to 30+ Hours
<b>Format</b>	Video Lectures   Business Plan Creation   Case Studies   Discussion Questions
<b>Availability</b>	DVD   Online

# Learning Framework

Open to Venture teaches how to start a small business with facilitated instruction: Video lectures, dozens of step-by-step business plans, and interactive case studies that ask “What would you do?”



Watch, Plan, Simulate

# How It Works

Open to Venture consists of 10 video lecture topics, facilitated discussions, quizzes, and YOUR CHOICE of activities, depending on the learning level of your audience and the instructional time available.

**BASIC**  
(Least Time)



Video  
Lecture



Discussion  
Questions



Quiz &  
Optional  
Essay



Stand-Alone  
Activity

**INTERMEDIATE**  
(Average Time)

**BASIC, PLUS...**



Business Plan  
Creation  
Activity

This is a building block process across all 10 topics. It is **RECOMMENDED** but may be too complex or time intensive. May be used *in lieu of* or *in addition to* the stand-alone activities (which are generally quick & fun).

**ADVANCED**  
(Most Time)

**INTERMEDIATE, PLUS...**



Interactive  
Case Studies

For the most robust experience, miniature case studies allow students to apply concepts to real-world situations. They work in teams to solve problems. These can up to **DOUBLE** instructional time.



# Video Topics



Topic	Overview	Biz Plan Activity
On Your Own	The big picture. Defines small business ownership, explains pros/cons of the path, traits of successful entrepreneurs, identification of competencies, and ways to use the skills gained in the course.	<ul style="list-style-type: none"> <li>• Self-reflection on key traits</li> <li>• Answering 10 tough questions</li> </ul>
Risk	Examines the financial and personal requirements of successful startup, frames the risks, outlines basic economic theory, and discusses business ethics.	<ul style="list-style-type: none"> <li>• Selecting a business concept</li> <li>• Reviewing personal risk factors</li> <li>• Creating a personal budget</li> </ul>
Strategic Direction	Defines generic firm strategies, assessing your strategic direction, using business strategy tools like S.W.O.T. analysis, and creation of a mission statement.	<ul style="list-style-type: none"> <li>• Summarizing the business concept</li> <li>• Analyzing SWOT/Differentiation</li> <li>• Drafting a Mission Statement</li> </ul>
Marketing & Sales	Defines concepts of product, price, promotion, and place. Offers specific tactics for connecting with customers, for selling, and for customer service/relationship management.	<ul style="list-style-type: none"> <li>• Decisions on the 4 Ps</li> <li>• Emphasis on pricing, driven by desired hourly wage rate</li> </ul>
Operations	Explains sourcing, production, and delivery. Reviews tools for production and operations management such as task lists, schedules, project plans, and inventory control.	<ul style="list-style-type: none"> <li>• Decisions/costing for equipment, materials, and consumables</li> <li>• Space and transportation choices</li> </ul>
Finance & Accounting	Defines the big three financial statements: Income statement, balance sheet, and cashflow statement. Looks at budgeting processes and explains fixed vs. variable cost. Reviews bookkeeping methods.	<ul style="list-style-type: none"> <li>• Creating an operating budget</li> <li>• Creating a startup budget</li> </ul>
People, Process, & Technology	Examines the role of supporting business functions including people leadership/management, the value of process thinking, and the use of technology. Offers specific tactics for executing on each.	<ul style="list-style-type: none"> <li>• Practicing process thinking</li> <li>• Reflecting on people/tech needs</li> </ul>
Back Office	Outlines the specific tasks required to start/run a small business including legal formation, licensing/permitting/inspections, bank account setup, office and equipment purchase and contracting.	<ul style="list-style-type: none"> <li>• Compiling necessary back office to-dos and prioritizing them</li> </ul>
Return	Examines different types of return in business (financial and non-financial). Offers a method to maximize returns called the Triage method. Discusses common funding sources and pros/cons of each.	<ul style="list-style-type: none"> <li>• Practicing the triage method</li> <li>• Sizing up funding sources</li> <li>• Conducting breakeven analysis</li> </ul>
Grow or Exit	Offers strategies for growth through increased sales or cost cutting methods. Details the product innovation pipeline, continuous improvement thinking, and info on winding down a firm if needed.	<ul style="list-style-type: none"> <li>• Developing growth options</li> <li>• Creating continuous improvement</li> </ul>

Guided

# Business Plan Activity

Students will pick one of 35 business concepts (or create their own). After each video lecture, they will work on a related part of their business plan.

Name: \_\_\_\_\_

Acceleron

**Carpentry: Business Concept Worksheet**

Directions: Begin by reviewing the gray box to make sure it is a business concept you want to pursue. Then use the additional info below as inputs to your business plan at the right time, as instructed.

CARPENTRY	Basic Equipment	Minimum Training	Vehicle Needed	Customer Demand	Base Labor Rate (Hourly)
Summary from Selection Worksheet	\$1800	Some Classes	Car/Truck	Average	\$35

**What They Do:** Carpenters are broken down into two groups, rough and finished carpenters. Rough carpenters generally build structures like room additions using wooden studs and plywood. Finished carpenters build cabinetry, furniture, install crown molding and focus on more cosmetic work.

**Work Environment:** Rough carpenters generally work on site/outdoors. Finished carpenters either work on site/indoors or have a shop. Average physical abilities are needed. Reading blue prints is a must.

**Education & Training:** On the job training or apprenticeship program preferred.

**Pro Tip:** Make the most of this opportunity by paying attention to remodeling efforts in progress. Also, keep up with applications to the local government building permit division for customer leads. Cabinetry and furniture items can be displayed at local craft shows.

**Product/Service Offerings**  
(Use as Inputs LATER to "S.W.O.T. Analysis" Worksheet AND "Product & Place" Worksheet)

Room additions or remodeling  Custom furniture/products

Crown molding and cabinetry  Other: \_\_\_\_\_

Which of these are you best at? \_\_\_\_\_

Initial Cost	Basic Equipment
\$1100	Table saw, miter saw, hand saws, planer, joiner jigsaw, router, sander
\$250	Drills, chisels, hand tools, rasps, shapers, clamps, level, nail gun.
\$450	Squares, angles, measuring tools, hand drill, drill press, circular saw, work bench
\$100	Saw horses, hammers, marking tools.
\$:	Other: _____

Total Equipment Cost: \$1900 | OR YOUR TOTAL W/ OTHER ITEMS \$ \_\_\_\_\_

Continued on next page. Page 1

These business concepts map to commonly taught vocations and trades, and can all be started on a total budget \$7,500 or less (often much less).

Is there another plan you need? [support@acceleronlearning.com](mailto:support@acceleronlearning.com)

- Appliance Repair/Tech
- Artist/Craftsperson/Maker
- Basic Auto Maintenance/Repair
- Basic Auto Body/Dent Removal
- Beekeeper
- Braille Transcriber
- Bricklaying/Stone Masonry
- Carpentry
- CNC Machine Programming
- Comm. Tech/Audio Visual Install
- Computer-Aided Design
- Computer Maintenance
- Cosmetology/Barber
- Desktop Publishing & Admin Services
- Driver (Rideshare, Delivery etc.)
- Electrical Trades
- Event Planning & Hospitality
- Food Vendor
- General Home Repair
- HVAC
- Independent Customer Service Rep
- Interior Design/Decorating
- Janitorial/Housekeeping
- Landscape Design/Maintenance
- Metal Fabrication & Welding
- Painting/Drywall
- Pet Care
- Photography/Videography
- Plumbing
- Roofing
- Shoe Shine
- Small Engine Repair
- Software Coding/Web Design
- Wash & Detail (Car, Boat, etc.)
- Create Your Own (Describe)



# Interactive Case Studies

Each video lecture topic can be coupled with an interactive case study. Cases put students in the shoes of a business owner. It's applied learning in a team setting!

## 60-Minute Case Flow

:10	Read for Understanding
:10	Individual Brainstorming
:20	Team Solving
:10	Team Presenting
:10	Class Discussion



Each case study includes...

- A two page case narrative
- Helpful case exhibits
- A facilitator solution note:
  - Opening Questions
  - Case Analysis
  - Recommended Action

### Facilitating the Cases

**Class Setup**

- Have the class watch the "Case Welcome" video on the video DVD (in Video area of the file) BEFORE starting the first case study.
- Students will work independently for the first 20 minutes, then teach students for 20 minutes. In the last 20 minutes, teams will present a & their recommendations (10 minutes). Then you will facilitate a case and provide a "recommended" course of action (15 minutes).
- We suggest mixing up the team participants for each case study, so a variety of perspectives from classmates during the course.

**Running a Case (refer to Case Study Overview page)**

- To help with time management, you will need a watch or clock for the. For each step like "Team Solving" I provide a verbal call-out so students should be working on. Someone should take notes during team time, present on behalf of each team. If available, leave calculators out for.
- When it's time for team presenting, have students give a 1 or 2 minute team's recommended actions. As they explain, ask why they are making recommendations (should be supported by information from the case have similar recommendations, THAT'S OK!).
- Depending on the dynamic of your class, you may not want teams to another's ideas. This is about THINKING & ANALYSIS SKILLS, not pe
- During the class discussion, begin with the **Opening Questions** from You may not have time to discuss all of them. These are designed to
- Now have your attention to the **Case Analysis**:
  - As you walk through the information, try to "draw it" the various teams. That requires you to take notes as teams go. For example, "Tim, your team suggested that they do X, which because... (match to one of the talking points) - or -" because, you had actually the business owner didn't... (in contrast to one of
  - As you unpack things, randomly pick students and ask "What's that?" or "Why do you think that's important?" to get feedback.
  - If possible, use a whiteboard/chalkboard to walk through diffi
- Close with the **Recommended Actions**. Cases are **SUBJECTIVE**, so our answer may not be the only good or viable one. It is our "best guess" based on the available information.

### P5052 Case Narrative: Rolling Cantina

This case assesses the risks of small business startup.

Suzie is a twenty-two year old single mother to a four-year old boy. She lives in a city where food trucks and food carts are common and would really like to have one of her own. It seems like there are new ones popping up every day, selling diverse kinds of cuisine. But even though there are many food trucks, Suzie thinks that if the food is good, there is always room for one more.

Her idea is to start a gourmet truck or cart selling sweet and savory empanadas. She wants to call it The Rolling Cantina.

A little background - Suzie quit school in her senior year to have her baby and completed a GED instead of graduating with her high school class. This did not bother her very much, since she never really liked school. She started waiting tables at the local Taco Palace when the baby was just a few months old, and worked mostly at night so she could be with him during the day.

Suzie continued to live with her parents after high school, so she could watch the baby while she worked. On the days when she had to work during the lunch shift, Suzie was able to hire a local woman to babysit if her mother could not. But sometimes it cost as much in child care as she made in tips, so she liked the night shifts better.

Most of the time Suzie stuck with waitressing, but if the restaurant was short-handed she would be asked to help in other areas. Because of this, Suzie learned how to wash pots, broil the grill, and prepare basic recipe ingredients.

At first, she did not like doing jobs that did not pay in cash tips. However, her boss, Mike, was very understanding when she needed time off if her baby was sick or if she had no one to watch him. So, Suzie showed her thanks to Mike by doing the jobs that needed to be done and didn't complain about it.

Mike liked to say that life would be because Mike trusted her, he star

This meant she was able to learn besides making and serving food, person did not show up or if a ve product.

This happened more often than it he always had a backup plan. For example, Suzie learned that a bus more work than anybody.

Suzie learned how to estimate fo day, but not so much that the fo vendors if the invoice was wrong, a new vendor if things weren't w

**Food Cart**  
Average price - \$2,500

**Food Truck**  
Average price - \$30,000

Step-by-Step

# Class Sessions

**PS052 Case Narrative: Rolling Cantina**  
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Mike liked to say that life would be great if everyone at the Taco Palace was more like Suzie. And because Mike trusted her, he started asking her to help with "back-of-the-house" jobs.

This meant she was able to learn about the different responsibilities involved in running a restaurant besides making and serving food. For example, Suzie saw how much trouble it could cause if just one person did not show up or if a vendor did not deliver on time or did not deliver the right amount of product.

This happened more often than she thought, and she was impressed with how calm Mike was and how he always had a backup plan. Most of the time his backup plan was to do the work himself. From his example, Suzie learned that a business owner needs to know all the jobs in a business and usually does

## Class Flow\*

- :05** Introduction
- :10** Video Segment 1
- :10** Discussion Questions
- :10** Video Segment 2
- :10** Discussion Questions
- :10** Quiz
- :60** Business Plan Activity
- :60** Interactive Case Study
- :05** Transitions

Anyone  
Can  
Facilitate

\* Can be structured either as :90 or :180 minutes

# Everything You Need

# Step-by-Step Facilitation

Each topic includes an easy to use facilitation guide. Step-by-step, it helps you with topic setup & context, discussion, activities, and debrief of business plans and case studies.

The collage displays several pages from the course materials, including:

- 4. MARKETING & SALES**: Instructor Prep Guide, Unit Description, Unit Materials, Success Traits, and a 10-minute class flow.
- 1. Introduction to the Lesson**: The Lesson Presentation, Historical Context, Social Context, and Personal Context.
- 6. Discussion Questions Video Part 2**: Multiple questions and potential responses for classroom discussion.
- 7. Activity**: Worksheet, Product & Place (5 Minutes), and a 10-minute debrief.

- To run the course, you'll also need...
- TV or projector/speakers
  - DVD player or Online access
  - Access to a photocopier
  - Pencils or pens
  - Tables and chairs
  - A whiteboard/chalkboard (optional)







Ton Of Helpful

# Resources & Tools



- Topic Setup & Context
- Discussion Questions
- Business Plan Activity
- Quizzes & Keys
- Case Studies
- Case Solution Notes
- Slides & Transcripts
- Success Trait Mapping
- Marketing Flyers
- Certificate Templates

**Activity Worksheet: Back Office Decisions**

Directions: Select which type of legal entity you will use in the year business the 1099 for needed items, and which type of license you will need for your business.

**Legal Entity Type (Check all that apply)**

<input checked="" type="checkbox"/> Sole Proprietorship or D.B.A.	<input type="checkbox"/> C-Corporation
<input type="checkbox"/> Limited Liability Corporation	<input type="checkbox"/> Other:
<input type="checkbox"/> S-Corporation	

**Required Paperwork (Check all that apply)**

<input checked="" type="checkbox"/> Federal EIN Setup (Form 99-4)	<input type="checkbox"/> Occupancy Permit/Inspection
<input checked="" type="checkbox"/> Entity Formation Filing (w/ State)	<input type="checkbox"/> Signage Permit/Inspection
<input type="checkbox"/> Sales Tax Permit (Most Businesses)	<input type="checkbox"/> 1099 or W2 Employee Filings
License (Describe):	Special Zoning (Describe):
Food Safety Permit/Inspection	Franchise Tax Payments
Health Permit/Inspection	Income Tax Payments (Corporate)
Pollution Permit/Inspection	Property Tax Payments
Fire Permit/Inspection	Other:
Construction Permit/Inspection	

**Banking Setup**

Save for Initial Deposit, Open Business Checking Account, Order Checks/Cards and Setup Card Processing (optional)

**Insurance Policies (Check all that apply)**

<input checked="" type="checkbox"/> General Business Liability	<input type="checkbox"/> Surety Bonds
<input type="checkbox"/> Property & Casualty	<input type="checkbox"/> Other:
<input type="checkbox"/> Marine/Boat	

**Carpentry Business Concept Worksheet**

Directions: Begin by reviewing the gray box to make sure it is a business concept you want to pursue. Then use the table below to make sure you have all the inputs to your business plan at the right time, as instructed.

Category	Basic Equipment	Minimum Training	Vehicle Needed	Customer Demand	Base Labor Rate (Hourly)
Selection Worksheet	\$1800	Some Class	Car/Truck	Slow Average	\$15

Carpenters are broken down into two groups, rough and finished carpenters. Rough carpenters build structures like room additions using wooden studs and plywood. Finished carpenters furniture, install crown molding and focus on more cosmetic work.

Rough carpenters generally work on site/outdoors. Finished carpenters either work on a job site or in a shop. Average physical abilities are needed. Reading blue prints is a must.

On the job training or apprenticeship program preferred.

Take most of this opportunity by paying attention to remodeling efforts in progress. Call applications to the local government building permit division for customer information and furniture items can be displayed at local craft shows.

**Service Offerings**  
LATER to "S.W.O.T. Analysis" Worksheet AND "Product & Place" Worksheet

Services or remodeling	Custom furniture/products
Storage and cabinetry	Other:

**Are you best at?**

**Basic Equipment**  
List as Inputs LATER to "Sourcing" Worksheet. Approx. Cost to Buy NEW...Try Used!

Hand saw, miter saw, hand saws, planer, joiner jigsaw, router, sander
Chisels, hand tools, rasps, shapers, clamps, level, nail gun,
Drill press, angles, measuring tools, hand drill, drill press, circular saw, work bench
Hammers, horses, hammers, marking tools,

Total Equipment Cost: \$1800 | **OR YOUR TOTAL W/ OTHER ITEMS \$** \_\_\_\_\_

Continued on next page. Page 1

## Self-Contained Training

### Instructor Led

### Peer-Educator Led

### Volunteer Led

Topics Fortified with

# Success Traits

Purpose	Methods
Visionary	Resourceful
Passionate	Networker
Person	Promoter
Persistent	Manager
Confident	
Trustworthy	
Risk-Taker	
Humble	
Abilities	
Competent	
Thorough	
Generalist	
Learner	



# Visit [OpenToVenture.com](https://opentoventure.com)

Once students have been through the Open to Venture process, they can take advantage of a WEALTH of helpful links, templates, and tools at FREE our website.





### 5. Operations

- Excel Templates [free template library]
- More Excel Templates [free template library]
- Google Doc Templates [free template library]
- The Goal [operations mgt. book]
- Fiverr [buy freelance services]
- Airtable [database tool]
- Dropbox [local/cloud storage]
- Prezi [presentation tool]
- Zoom [web meetings]
- Todoist [organized to do lists]
- Route 4 Me [route mapping tool]
- Trello [project mgt. tool]
- U.S. Postal Service [shipping]



### 6. Finance & Accounting

- Excel Templates [free template library]
- More Excel Templates [free template library]
- Google Doc Templates [free template library]
- Sales Order to Cash [flow of a sale]
- Accounting Coach [accounting education]
- Investopedia [finance education]
- Freshbooks [accounting software]
- Wave [accounting software]
- Thumbtack [find a bookkeeper]

**Resources**

**Education**

**Templates**

**Tools**



Optional  
**Certification**