



Jumpstart Kit

Everything you need to help your clients with cash flow

Jumpstart Kit

- 3 Welcome SBDC Advisors
- 4 Why Cash Flow is Essential
- 5 Getting Started - Advisors
- 10 Free Resources for your Clients
- 12 Helpful Information

Welcome SBDC Advisors

Welcome!

*Finagraph has partnered with Moody's Analytics, America's SBDC, and the Foundation for Small Business Development, to create the **Pathway to Prosperity** initiative.*

*This initiative provides SBDC advisors and small business owners with cash flow management and forecasting expertise through a variety of program offerings which are absolutely **free** to you.*

We have assembled state-of-the-art training, software and certification resources that will allow you to expand your SBDC advisory services and help your clients become proficient in cash flow. These resources were designed specifically for you to implement with your clients and allow them to grow and thrive.

This Jumpstart Kit will walk you through how to get started, what resources you have access to, and how to implement the training and tools with your clients. It will also show you how to directly give these resources to your clients as well!

Let's go help every business thrive!

The CashFlowTool Team

SBDC@cashflowtool.com



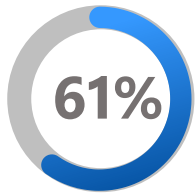
PATHWAY TO
PROSPERITY

BY MOODY'S

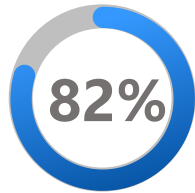


Why Cash Flow is Essential

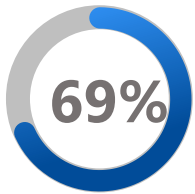
Cash flow is the lifeblood of every business. Whether thriving, struggling or just starting up, every business needs to focus on cash flow. Below are some stats on why cash flow is important for small businesses and why we have created this program to help you help your clients.



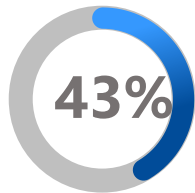
of small businesses regularly struggle with cash flow ¹



of business failures are due to poor cash flow management skills / poor understanding of cash flow ¹



of small business owners have been kept up at night by concerns about cash flow ¹



of small business owners have been at risk of not paying employees by payday ¹



According to the SBA study of small businesses in the US ³

200,000 businesses go out of business every single-quarter.

82% of them did so because they didn't understand how to effectively manage their cash flow

¹ - Wakefield Research survey - Jan 2019

² - Preferred CFO Study - March 2020

³ - Small Biz in the US - May 2019 (<https://townsquared.com/ts/resources/small-business-united-states-numbers/>)





Getting started as an Advisor

Easily expand your SBDC advisory skills to include cash flow management and forecasting services.

1

GET TRAINED

Be aware of the cash flow resources available to you and to your clients



Take the **Business Cash Flow Essentials** course (FREE)

This course is designed to educate and equip you with critical and essential cash flow concepts that every business needs to maximize their cash flow and profits in a simple, yet powerful way.

6 interactive lessons – 2 hr 30 min

Learn cash flow essentials & immediately apply concepts in CashFlowTool

Exclusive resources

Downloadable materials to follow along during each lesson

Lessons Topics

- The Importance Of Cash Flow In Business
- The Speed of Cash
- Ratios & Financial Analysis (Part A)
- Ratios & Financial Analysis (Part B)
- Silent Killers of Cash Flow
- Forecasting



Go to Training

2

SETUP YOUR CASHFLOWTOOL DEMO ACCOUNT

Know how to fully use CashFlowTool and be ready to help your clients.

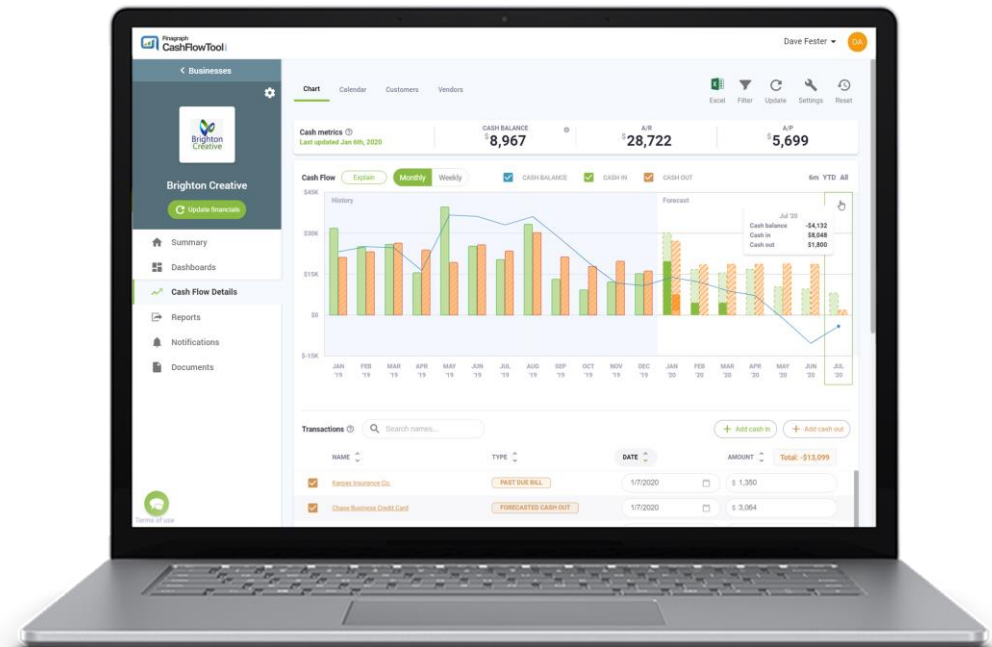


Get your CashFlowTool demo account now (FREE)!

Get setup with a free CashFlowTool demo account that includes a sample business that you can learn everything you need about the tool.

You can use this account to demo the tool to your business clients.

You can also use this account to get certified on CashFlowTool (Section 3).



Setup your demo account

3

GET CERTIFIED

Become a Cash Flow Pro so that you know CashFlowTool inside and out.



Take the CashFlowTool Certification Course (FREE)

This is a premium certification course which will enable you to become an authorized expert in CashFlowTool. This course will equip you to help your clients stay in business and thrive by eliminating cash flow problems as a reason they might fail. Using CashFlowTool with your clients will help them eliminate surprises and make quicker business decisions by going beyond the financial statements and predicting what will happen in the future.

8 interactive lessons – 2 hr 35 min

User your demo account and learn everything you need to become a Cash Flow Pro.



[Go to Training](#)

4

TELL YOUR CLIENTS

There are free resources you can offer today!

Reach out to your Clients

You are now trained in cash flow principles and a certified Cash Flow Pro! You are ready to help all your business clients with cash flow expertise.



Email and introduce Cash Flow to your Clients

In the back of this Jumpstart Kit you'll find a sample email that you can send out to clients introducing them to the Business Cash Flow Essentials Training and 50% off of a subscription to CashFlowTool Pro.



Present to your Clients

We have prepared a ready-to-go PowerPoint presentation that you can present to your business clients to they know why cash flow is critical to focus on, what resources are available to them and how the SBDC Advisors can help!

[Download PPT](#)



Tell your clients about the FREE resources

In addition to your expertise as an SBDC advisor, your clients also get a range of free resources to help them manage cash flow in their business. The next section will give you details about all the resources that you can offer them for free today!



Resources available to your clients

Here are the free resources you can offer your clients ranging from free training to 50% off a subscription to CashFlowTool. They are waiting for you!



FREE Cash Flow Resources to Offer Your Clients

As a SBDC advisor you are an expert in cash flow. Clients should be reaching out to you about cash flow and how CashFlowTool can help!



FREE Business Cash Flow Essentials Training

Your clients can take the Business Cash Flow Essentials course which gives them essential insights and tools to become experts in cash flow management.

[Go to Training](#)



50% off a subscription to CashFlowTool Pro

Give your clients the ability to easily see and manage their cash flow today and tomorrow for your business with this exclusive discount offered to SBDC business customers.

[Get Offer](#)



FREE CashFlowTool Training

Have your clients learn how to use CashFlowTool by taking the CashFlowTool Training Course and start using CashFlowTool in their business.

[Go to Training](#)



Helpful information

Here is some helpful information (sample emails, contact information, links to resources and more)

Sample Email To Clients

Hi (Name),

We have some new offerings to help your business in the area of cash flow management and forecasting. You probably have heard the phrase “cash is the lifeblood of a business” and this rings true given over 61% of small businesses regularly struggle with cash flow and 82% of business failures are due to poor cash flow management skills.

We would like to help! The SBDC has partnered with Finagraph, the makers of CashFlowTool to provide you with 2 free cash flow online training courses as well as 50% off a subscription to CashFlowTool Pro. As one of my SBDC clients, I want to encourage you to take advantage of this program and also offer my expertise to help you with cash flow as well.

We can use this tool to help guide our sessions, track our progress and gain invaluable insights into your business cash flow. We will be able to see how your business is doing today, how your cash flow looks for the next 6-months and offer recommendations to help you.

To learn more about these powerful resources, simply visit: <https://www.cashflowtool.com/sbdc/clients>

Let me know if you would like to discuss further.

Sincerely,

Your SBDC Advisor



Useful Links

SBDC Advisor



FREE Business Cash Flow Essentials Course

<https://www.cashflowtool.com/sbdc/bcfe-course>



FREE CashFlowTool Certification Course

<https://www.cashflowtool.com/sbdc/cft-certification>



Request CashFlowTool Demo Account

www.cashflowtool.com/sbdc/advisors#request-access

SBDC Clients



FREE Business Cash Flow Essentials Course

<https://www.cashflowtool.com/sbdc/bcfe-course>



FREE CashFlowTool Training Course

<https://www.cashflowtool.com/sbdc/cft-certification>



50% off a subscription to CashFlowTool Pro

www.cashflowtool.com/sbdc/clients#get-it-now



General Information to learn more about cash flow

www.cashflowtool.com/sbdc/clients

Notes



cashflowtool.com/sbdc

SBDC@CashFlowTool.com