



January 2023

Dear participants:

Welcome and congratulations on being accepted into the **2023 Ascend Portland program**.

The program dates are January 2023-January 2024. Curriculum sessions (via Zoom) will take place between January 26, 2023 - July 13, 2023 from 9am-12pm, beginning with Orientation on January 26th. One-on-one advising sessions, learning sessions, CEO Connection Groups and Guest expert panels will be taking place throughout the program.

January 26, 2023 - *Program Orientation - Session 0*

In this introductory session, you will have the opportunity to meet one another as well as Livelihood NW staff, Ascend Portland partners and program donors. Program components and expectations will be covered.

February 9, 2023 - *Setting the Stage for Growth & Competing for Customers - Session 1*

In this session, you will set the foundation for future growth by evaluating your entrepreneurial mindset and taking stock of the current state of your business. We will equip you with tools to develop a targeted strategy to more effectively reach customers and improve sales by deepening your understanding of your customers' evolving needs in a changing competitive landscape.

February 23, 2023 - *Analysis of Company Potential - Session 2*

This session will take a deeper dive into tools for conducting an internal and external analysis to orient you to your company's current capabilities and opportunities.

March 9, 2023 - *Analyzing Future Growth Opportunities - Session 3*

This session will help you apply your internal and external analysis to refine your market access goals and develop a strategy for implementing and tracking them.

March 23, 2023 - *Leadership for Growth - Session 4*

This session will deepen your leadership and relationship skills. It will cover results-based management, time prioritization, delegation, and managing conflict.

April 6, 2023 - How to Make Strategic Financial Decisions - Session 5

Through small business case studies and the analysis of financial statements, this session will expand your knowledge of how to identify key financial indicators to evaluate your business' current situation and identify areas of growth.

April 20, 2023 - Financial Management for Strategic Growth - Session 6

In this session, you will take a deep dive into financial management, including best practices and templates for pricing as and establishing, building & leveraging credit. Through scenario analysis and peer to peer learning, you will learn how to apply these financial management fundamentals to identify how your pricing affects profits, which SKUs to prioritize, which sales channels bring you the most revenue and how much to mark-up for brokers, distributors and buyers (wholesale and retail).

May 4, 2023 - How to Access Funding - Session 7

In this session, you will learn what type of funding is needed and available at different stages of your business and how to prepare for the lending process. We will cover how to do market research for different lenders and the types of financing options offered by Business Impact NW. Peer to peer learning and discussions will provide insights in how to identify which type of funding is right for you.

May 18, 2023 - Small Business Legal Topics - Session 8

This session will provide you with tools and resources for addressing and avoiding legal issues that come with running and growing a business in economically challenging times.

June 1, 2023 - Partnerships for Growth - Session 9

There is nothing more powerful than creating strong relationships in business. How do you communicate effectively with your wholesale and retail partners? How do founder relationships foster a sense of community and collaboration that ultimately benefits your brand? How do you work with a broker, distributor and co-packer? How do you get into a regional grocery store? Should you work with Amazon? This session will focus on developing a partner strategy that is critical to long term success in not only retail environments, but also from a community standpoint.

June 22, 2023 - Bridging the Digital Divide - Session 10

Most founders know their brands and products, and when given the opportunity to talk about it in person, they can persuade customers to buy. But how does your voice and brand message come across in a digital environment? The session will equip you with the ability to marry your social strategy with your in-person one and will provide opportunities for feedback on your approach for experts. You will learn how to create effective communication channels via e-newsletters and social platforms which will give you the ability and confidence to compete in an increasingly digital world.

June 29, 2023 - Positioning Your Company for Market Access Growth - Session 11

You have identified which sales channels you want to focus on and so now it is time to pitch your company. Whether you are targeting a wholesale, retail or grocery buyer, an online customer or a corporation, in this session you will get feedback on your company's brand positioning, pitch, and

mission from experts. Through peer to peer learning and guest experts, you will learn best practices for securing meetings with buyers.

July 13, 2023 (9am-11am)- Strategic Road Map Presentations - Session 12

In this session, you will be presenting your strategic road map. Your map will reflect the work you have done thus far in the program and will guide you in how to make the most of the second half of the program.

July 13, 2023 (11am-12pm)- Celebration

Kick back and celebrate your hard work during the curriculum portion of the program. Family, co-workers and friends are welcome to join this virtual celebration.

Note: Sessions are subject to change based on the evolving business needs of the cohort.

Questions:

Please contact Ascend Portland's Program Manager, Colleen Slinkard, at colleen@livelihoodnw.org or 360-553-4207.

Special Thanks:

A special thanks to the following partners and sponsors who helped make this program possible.

