



# Client Handbook

# Client Handbook

## Table of Contents

	<u>Page</u>
Mission, Vision and Core Values .....	3
Client Characteristics .....	4
Product/Services Evaluation .....	4-5
Client Application .....	6-12
Client Services Agreement .....	13
Marketing Agreement .....	15
Confidentiality Agreement .....	16
Conflict of Interest Statement.....	17
Alignment, Planning & Coaching.....	18-20
Developer Program Guidelines .....	21
Graduation Policy .....	22

# **Garden City Downtown Vision, Inc. Jump Start Business Developer**

## ***Developing Entrepreneurs through Business Development***

### **Our Mission**

Creating opportunities to strengthen Downtown Garden City's economic base.

### **Our Vision**

Historic Downtown Garden City is the regional destination in southwest Kansas for unique shopping opportunities, dining, healthcare, arts, and entertainment. Fully occupied and renovated buildings, surrounded by beautiful, clean streetscapes make this an exciting, safe gathering place—the community's hearts and soul. The restoration of significant properties, including the Windsor Hotel and State Theater, strengthen downtown's position as a focal point in the community.

### **Our Core Values**

- We are committed to helping our clients achieve business growth, profits, and long-term sustainability.
- We are committed to using creativity, innovation, and entrepreneurial thinking to assist clients and improve our programs.
- We are committed to accomplishing our work with honesty, open accountability, and integrity.
- We are committed to having the knowledge, skills, tools, and resources needed to guide our clients to success.
- We are committed to the wise investment of public funds, to operating in an efficient and frugal manner, and being good stewards of all of our resources.

### **What is JumpStart**

The Jump Start Business Development Program is designed to enhance the community's entrepreneurial climate in the retail sector of our core business district by identifying locations that specifically meet the needs of individual startup businesses outlined in the City's Comprehensive Plan.

This is a competitive grant-based initiative where entrepreneurs work collaboratively with Downtown Vision to achieve our goal of strengthening the downtown economy.

Jump Start program is a mobile concept benefiting startup business and helping building owners fill their empty storefronts. The program helps to subsidize the rent & utilities of business new to Downtown Garden City over a two-year period: 50% the first year, 25% the second year.

Potential candidates will submit to Downtown Vision a business plan that proves the business is sustainable and fits within the desired types of businesses listed in the Comprehensive Plan

- Business must be retail oriented
- Once a business is established, ALL business partners are required to meet with a Downtown Vision to review business expenses, bookkeeping, and budgets. The goal is to create sustainable and successful businesses.
- Downtown Vision will remain vigilant throughout the two year period and may provide guidance and tools to insure the success of the business.
- Business may be asked to take part in peer reviews.

## **Client Characteristics**

It is the goal of the Jump Start Business Developer to engage clients that are committed to the process of business development, entrepreneurial development and entrepreneurial education. In order to accomplish this goal, potential clients will:

- Exhibit a commitment and willingness to accept guidance, be coachable
- Have a desire to learn
- Have a passion for business ownership
- Have a strong desire to grow and expand their business
- Be willing to admit to and learn from mistakes
- Understand that business development is a process
- Have a grasp and working knowledge of basic business principles (Operations, Marketing, Management, Financing, Technology)
- Have the ability to inject or raise capital as may be needed for the operations of the business
  
- Understand that a small business owner cannot be an expert at every facet of a business operations and is willing to engage the services of professionals
  
- Is knowledgeable about their product or service and the market environment in which they will be selling

## **Product/Services Evaluation**

Although the individual characteristics of the entrepreneur are very important, the product or service must have commercial viability. The product or service will be evaluated utilizing the following criteria in an effort to determine whether or not the potential for commercial viability exists:

- Does the concept align with the Garden City Master Plan and Comprehensive Plan?
- Has the product or service progressed beyond the proof of concept stage?
- Is there a reasonable chance for acceptance in the market place (demand) or will demand need to be created?
- What problem/need is being solved?
- What benefits does the product or service provide?
- What is the potential for the creation of new jobs?
- What is the competitive landscape within the market place?
- What is the unique competitive advantage and how will the company differentiate itself within the market place?
- How does the company plan to sustain its competitive advantage?
- What is the projected financial return for the company (measured through a forecasted P&L, balance sheet, cash flow statement, etc.)?
- How does the company plan to sell its product?
- Will the company compliment or compete with existing downtown merchants?
- Where can the product/service be sold? Locally, regionally, nationally or internationally?

## Jump Start Application

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

Contact Person: \_\_\_\_\_

Current Address: \_\_\_\_\_

Mailing Address: \_\_\_\_\_  
(If different)

Telephone: Business: \_\_\_\_\_ Home: \_\_\_\_\_

Cell: \_\_\_\_\_ Fax: \_\_\_\_\_

E-Mail Address: \_\_\_\_\_

Business Status:

Description of Business and Products/Services provided: \_\_\_\_\_

\_\_\_\_\_

Legal Organization of Firm:

\_\_\_\_\_ Sole Proprietorship Federal Employer Tax ID #: \_\_\_\_\_

\_\_\_\_\_ Partnership

\_\_\_\_\_ Limited Liability Company

\_\_\_\_\_ Corporation State: \_\_\_\_\_ Date of Incorporation: \_\_\_\_\_

Principal Owners/Stockholders/Business Partners

Name: Address: Social Security Number:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Sales Tax #: \_\_\_\_\_

Is your business subject to state or local licensing requirement? \_\_\_\_\_ Yes \_\_\_\_\_ No  
If yes, please describe the required licenses and steps you have taken to obtain the licenses.

---

---

Do you have a business plan? \_\_\_\_\_ Yes \_\_\_\_\_ No  
If yes, please attach a copy.

Do you have a marketing plan? \_\_\_\_\_ Yes \_\_\_\_\_ No  
If yes, please attach a copy.

If no, do you need assistance in preparing either plan? \_\_\_\_\_ Yes \_\_\_\_\_ No

Please list local, regional, or national/international firms you consider to be your primary competition:

---

---

How many new full- and part-time employees do you plan to add over the next two years?

\_\_\_\_\_ Full-time \_\_\_\_\_ Part-time

Explain: \_\_\_\_\_  
\_\_\_\_\_

What are your approximate space requirements?

Office \_\_\_\_\_ square feet

Production \_\_\_\_\_ square feet

Storage/Warehousing \_\_\_\_\_ square feet

Other (explain below) \_\_\_\_\_ square feet

\_\_\_\_\_

Total Needed \_\_\_\_\_ square feet

What are your projected total space requirements in?

One Year \_\_\_\_\_ square feet

Two Years \_\_\_\_\_ square feet

Three Years \_\_\_\_\_ square feet

Will you: Yes No

Have any unusual telephone/internet system requirements? \_\_\_\_\_

Explain: \_\_\_\_\_  
\_\_\_\_\_

Have special sewer use needs? \_\_\_\_\_

Explain: \_\_\_\_\_  
\_\_\_\_\_

Have special water use needs (other than restrooms)? \_\_\_\_\_

Explain: \_\_\_\_\_  
\_\_\_\_\_

Please list any special licensing or certification requirements required for your business?  
(food handling, health care, etc)

---

---

Use special laboratory facilities, toxic, corrosive,  
or inflammable chemicals? Explain:

---

---

---

---

Have special or high use electrical power requirements  
attributable to equipment used in your business? Explain:

---

---

---

---

Generate fumes/gases requiring special venting?  
Explain:

---

---

---

---

Will you:

Yes

No

Generate noise which will require soundproofing and/or  
special partitioning? Explain:

---

---

---

---

Generate or use heat or use a heat-related process?  
Explain:

---

---

---

---

Other special needs or requirements?  
Explain:

---

---

---

---

Please describe what is/will be your personal financial investment and time commitment to this business.

---

---

Have you met with a licensed Certified Public Accountant (CPA)?

---

Is it intended that this business provide you or the managing principals with your primary source of income?

---

---

What are your projections of needed capital for the business during the next 1-3 years?

---

---

Where do you propose to obtain this capital? \_\_\_\_\_

---

How do you think the Business Developer can assist you in developing your business?

---

---

Add any additional information that will help the selection committee understand and evaluate your firm's potential for growth and success. Attach additional pages or documents as appropriate.

---

---

Please provide two references for each business partner.

_____	_____
Name	Name
_____	_____
Address	Address
_____	_____
Phone	Phone

I am applying for admission to the Jump Start Business Developer. I certify that all the information contained in this application is true and accurate. I further understand that the information provided will be held in the strictest confidence and only used to evaluate an applicant's suitability for admittance into the developer. By signature to this Application, applicant acknowledges that the Jump Start Business Developer may obtain relevant credit history information with respect to the applicant business and/or its principals. In addition to this the Jump Start Business Developer may conduct a criminal background check through the Garden City Police Department. I also understand that this application is subject to review and in no way guarantees my admittance to this program and that no liability will be assumed by the Jump Start Business Developer or the Garden City Downtown Vision, Inc.

_____	_____
Applicant's Signature	Date
_____	_____
Applicant's Signature	Date

---

## **Applicant Checklist**

**Please ensure all areas listed below are addressed before submitting your JumpStart application to the Downtown Vision office.**

- \_\_\_\_\_ JumpStart Application
- \_\_\_\_\_ Copy of lease (can submit a signed or proposed lease)
- \_\_\_\_\_ Joint Venture Agreements (signed by all parties)
- \_\_\_\_\_ 3<sup>rd</sup> Party Investor forms (signed by all parties)
- \_\_\_\_\_ Credit Check/Background Reports (completed for all business partners)
- \_\_\_\_\_ Sales Tax ID information
- \_\_\_\_\_ Business /Marketing Plans
- \_\_\_\_\_ Utility estimates
- \_\_\_\_\_ State & Local Licensing requirements (if applicable)
- \_\_\_\_\_ Insurance information
- \_\_\_\_\_ Certified Public Accountant
- \_\_\_\_\_ Copies of budget and financial statements
- \_\_\_\_\_ Signed Agreement (page 14)

# Jump Start Business Developer

---

Client Credit History and Criminal Background Report  
Authorization Form  
(to be completed by ALL business partners)

---

## Permission to check credit:

I grant Jump Start Business Developer permission to conduct a check of my credit history.

Name \_\_\_\_\_

Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_ Phone \_\_\_\_\_

Signature \_\_\_\_\_ Social Security Number \_\_\_\_\_  
(required) (required)

Date \_\_\_\_\_

---

## Authorization to obtain criminal background report:

Name: \_\_\_\_\_ Driver's License: \_\_\_\_\_ State: \_\_\_\_\_  
(required) (required) (required)

Date of Birth: \_\_\_\_\_ Social Security Number: \_\_\_\_\_  
(required) (required)

I understand that a criminal background check is a condition of being considered as a client of Jump Start Business Developer. I consent to Jump Start Business Developer/Garden City Downtown Vision obtaining my criminal background report from the Garden City Police Department. I further agree to indemnify and hold harmless the Garden City Police Department, the Jump Start Business Developer and Garden City Downtown Vision, Inc. and its employees from any liability arising from the release of this information.

\_\_\_\_\_  
Signature (required)

Subscribed and sworn to before me on this \_\_\_\_\_ day of \_\_\_\_\_ 20\_\_\_\_

\_\_\_\_\_  
Notary Public (required)

## Client Services Agreement

This Client Services Agreement (the “Agreement”) is entered into by and between the Jump Start Business Developer/Garden City Downtown Vision and \_\_\_\_\_, (the Client). The purpose of the Agreement is to describe the services and assistance that the Business Developer will provide to Client. The term of the Agreement shall be for a period of one year commencing with the following effective date, \_\_\_\_\_, or until such time as the Agreement is terminated by mutual consent, the Client has reached a point of graduation, growth objectives have not been met or a violation of the Lease Agreement occurs.

- Client will be responsible for their lease agreement with building owner and will provide a copy of the lease to Downtown Vision along with the completed JumpStart application.
- All joint venture agreements must be included in the application and all business partner(s) listed in the application.
- All silent party investors must complete the third party investor form.
- Jump Start Business Developer/Garden City Downtown Vision will reimburse rent/utilities after receipts have been turned in, per these guidelines:
  - 50% reimbursement on 1<sup>st</sup> year of business
  - 25% reimbursement on 2<sup>nd</sup> year of business
- The maximum amount of utilities covered per applicant will be determined during the application process. Utilities shall be defined as follows:
  - Electricity/gas
  - Phone (land line only, no cellular phones)
  - Internet (hardwired internet only, no wireless)
- All other bills incurred shall be at the expense of the client

## Business Services

All developer clients will be required to meet with the Jump Start/Downtown Vision staff once each month for the first year, and quarterly thereafter for an Accountability Review to measure progress toward their goals, identify barriers to growth, and explore new opportunities. The AR process includes, but is not limited to:

1. Review of goals and objectives from the business plan.
2. Review of financial statements. (Note: Clients are required to provide financial statements (income statement and balance sheet) one week prior to their AR.)
3. Comparison of actual performance to goals including:
  - Financial performance compared to projections

- Expense (cost) control compared to projections
  - Margin control compared to projections
  - Cash flow control compared to projections
  - Marketing performance (sales, leads, orders, promotions, etc.)
  - Personnel issues and performance
4. Future needs assessment for next quarter, year, etc.
  5. Establishment of short-term goals for the coming months
  6. Review of long-term goals, with adjustments made as required.
  7. Discuss client issues such as:
    - Facility needs (space, equipment, utilities, etc.)
    - Areas where developer volunteer & staff members can help
    - Actual or perceived barriers to growth and how to overcome them.
    - Other needs, issues, complaints, etc.

**Agreement to Participate**

I understand that the Jump Start Business Developer provides a unique environment in which businesses can lease office and/or production space and receive business development assistance. I agree to participate in group activities such as, but not limited to, workshops, seminars, and meetings as determined by developer management. I further agree to interact with other clients in non-competing companies sharing lessons learned, participating in round table discussions, and providing collegial support. Such participation is not intended to distract clients from their own company business and will be held to a minimum. I also agree to participate in the Accountability Review process as described above. I understand that my relationship with the Jump Start Business Developer/Garden City Downtown Vision does not create or imply a partnership agreement and that the ultimate success of my business is solely my responsibility.

\_\_\_\_\_  
Client Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Garden City Downtown Vision

\_\_\_\_\_  
Date

## Marketing Agreement

The undersigned client agrees that the Jump Start Business Developer & Garden City Downtown Vision, Inc. may use the client's name, logo, and non-proprietary company information for promotional purposes. This may include but is not limited to websites, annual reports, research papers, articles, marketing materials, television, radio, print media and testimonial statements for the Jump Start Business Developer.

It is also agreed that clients may use "a client of the Jump Start Business Developer" in their promotional materials. All reciprocal use of the Jump Start Business Developer logo must be approved by the Jump Start Business Developer & Garden City Downtown Vision before use and only the official approved logo supplied by the Jump Start Business Developer may be used upon placement approval.

\_\_\_\_\_  
Client Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Garden City Downtown Vision

\_\_\_\_\_  
Date

## **Confidentiality Agreement**

It is agreed and understood that as a client of the Jump Start Business Developer and Garden City Downtown Vision, the undersigned Client is receiving certain assistance from /the Jump Start Business Developer/Garden City Downtown Vision in the areas of business organization, management, marketing and other related business areas.

1. The Jump Start Business Developer/Garden City Downtown Vision agrees to keep confidential and not disclose to a third party any information contained in any business plan, financial information and or other documents related to the Client's business operations or verbal information provided by the Client.
2. The Client agrees to indemnify the Jump Start Business Developer/Garden City Downtown Vision from any claim(s), if any, arising from suggestions, technical assistance or advice provided to the Client by the Jump Start Business Developer/Garden City Downtown Vision.
3. Any reporting of client's company results will be aggregated with all client company results of the Jump Start Business Developer/Garden City Downtown Vision.

\_\_\_\_\_  
Client Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Garden City Downtown Vision

\_\_\_\_\_  
Date

## **Conflict of Interest Statement**

The mission of the Jump Start Business Developer/Garden City Downtown Vision is to create opportunities to strengthen Downtown Garden City's economic base. It is the goal of Jump Start Business Developer/Garden City Downtown Vision to provide its services with a high degree of expertise, professionalism and ethical behavior. To that end, all staff of the Jump Start Business Developer/Garden City Downtown Vision are to avoid those circumstances where a conflict of interest issue could be raised, whether real or perceived. Those circumstances might include, but are not limited to the following:

- The acceptance of any fees, commissions, or other financial compensation for services rendered to a client of the Jump Start Business Developer/Garden City Downtown Vision.
- The recommendation of goods or services to a client in which he/she may have a financial interest.
- His/her appointment to the management staff or operating board of any client owned company.
- Acquiring stock or any other equity position in any client owned company.
- Making a loan to any client owned company.

## **Alignment, Planning & Coaching**

### **Alignment and Positioning**

Your success is dependent on creating a business concept that properly aligns your personal vision with your business vision and financial goals. At the start of every business relationship, we have to understand where you are, where you want to go, and how we might help you reach your goals. Ultimately, we want to know if we can adequately help you and if you are a good fit for incubation.

We begin with a meeting to determine your mission, vision and core values. In the process, we will also uncover your strengths and weaknesses and some “points of pain.” At the end of this meeting, we will have several areas to work on that will launch us into the next phase.

### **90-Day Planning**

Once we have an understanding of where you are and where you want to go, we may help set specific, measurable goals and a timeline for reaching them. That’s the essence of the 90-day planning process.

We may set goals in areas of mastery, niche, leverage, and team so that you will see quick results. Then, we may provide coaching, training and networking opportunities within the incubation process to help you realize your goals.

### **Coaching**

Even professional athletes need a coach. Your developer business coach will help hold you accountable to your goals and provide objective, creative insight to help your business grow.

## Six Steps to Dramatic Results

### Mastery

The first stage of growing any business is making sure you deliver profitably, productively, and with enough information to make great decisions. Mastery is the foundational level that will help you to build a business: a commercial, profitable enterprise that *works*, without you. You must attain mastery in the key areas of Money, Delivery and Time. Mastery is not achievable over night, but is rather a continual process.

*Money* – Not only do you need to know and understand your historic numbers, but also the numbers that will create your future.

- Break-Even Mastery
  - Knowing how many sales, customers, or dollars you need to make per day to break even.
- Profit Margin Mastery
  - Setting a budget for profit each day, week and month so that you can implement strategies for success and growth.
- Reporting Mastery
  - Knowing your numbers each day, week and month so you can make decisions for the future.
- Test and Measure Mastery
  - Predicting your future profits by measuring the Key Performance Indicators in your business.

*Delivery* – Consistency is more important than brilliance. It does no good to bring in more people if you can't provide excellent service consistently. It would be like filling a bathtub without the drain plug.

*Time* - Your productivity and the productivity of your team will determine your success and profitability.

- Goal Mastery
  - Having clarity of where you are going and where you are driving the business; vision.
- Self Mastery
  - Using internal discipline, the discipline of your team and the discipline of your advisors to keep yourself focused and achieving your goals.

## **Niche**

Once you are running smoothly at a base profit, it's time to find your market uniqueness and build your sales and marketing strategies. Your marketing needs to convey what is unique about you and why someone should buy from you today. When your niche has been established, customers purchase your products or services based on the value provided and not cost alone.

*An Established Niche = No Price Competition*

## **Leverage**

Getting the right people in the right places, with the right plan, moves the business from people dependency to systems dependency. At this stage, it's important that we systemize the routine and humanize the exception.

## **Team**

Build a winning team so the Leader (Owner) supports the team, the team supports the customers, the customers support the business and the business supports the Leader.

## **Synergy**

When everything is in place, the collective outcome will be far greater than the individual inputs.

## **Results**

Time to enjoy the fruits of your labor from a commercial, profitable enterprise that works, without you.

## **Five Ways to Increase Your Profits**

- Profit Margin
  - Apply a “use it up, wear it out, make do and do without” philosophy to all expense categories and costs of the business.
- Average Dollar Sale
  - After margins, this is the easiest and fastest way to grow your revenue and profits.
- Conversion Rate
  - Getting more of the people who already contact you to buy from you is a very powerful way to grow your customer base.
- Number of Transactions
  - Your existing customers are a massive asset that you should be investing in.
- Number of Leads
  - Once I have the machine running, it’s time to put more people into the front end.

## **Developer Program Guidelines**

The Jump Start Business Developer/Garden City Downtown Vision is committed to conducting its business with professionalism, integrity and in accordance with federal, state and local laws to which its business activities are subject. It is the policy of the Jump Start Business Developer to prevent the occurrence of unethical or unlawful behavior, to halt such behavior as soon as reasonably possible after discovery, to discipline personnel who violate policies, counsel and/or terminate service agreements with clients who violate policies, including individuals who fail in their responsibilities to detect a violation, and to implement any changes in policies or procedures necessary to prevent reoccurrences of violation. Clients are expected to adhere to all of the following rules and regulations. Violation may result in termination of client’s lease and/or service agreement.

### **General**

- The Jump Start Business Developer/Garden City Downtown Vision provides equal opportunity to applicants who successfully complete the application process, regardless of their race, color, sex, religion, national origin, or age.
- The Jump Start Business Developer/Garden City Downtown Vision shall not discriminate against any qualified individual with a disability. Reasonable accommodations will be made for the known physical and mental limitations of otherwise qualified individuals with disabilities, unless this accommodation would impose an undue hardship on Jump Start Business Developer/Garden City Downtown Vision operations.

- In concert with the philosophy of business development, clients are referred to the Jump Start Business Developer/Garden City Downtown Vision Graduation Policy regarding criteria for graduation, retention and events of termination.
- The Jump Start Business Developer/Garden City Downtown Vision reserves the right to make and enforce such other reasonable rules and regulations as needed.

## **Graduation Policy**

### **Graduation**

Clients of the Jump Start Business Developer/Garden City Downtown Vision will be considered candidates for graduation upon achieving one or more of the following:

- Client has the ability to afford commercial building rates
- The client has completed two (2) years in the Jump Start Business Developer program
- The business has experienced significant levels of revenue growth or profitability
- The client can continue and grow its operations without further managerial assistance from the Jump Start Business Developer/Garden City Downtown Vision
- Additional areas as outlined by the Business Development Committee.

### **Criteria to participate in JumpStart year 2**

The Client Services Agreement is for a period of one year at the end of which the client will be evaluated for retention in the program. In order to be considered for retention, the client **must reapply 30 days prior to the end of the first year and be willing to meet the following:**

- Participate actively in the Alignment, Planning and Coaching process
- Exhibit a commitment and willingness to accept guidance, be coachable and **participate in peer reviews.**
- Demonstrate progress in meeting growth objectives

### **Termination**

Clients will be subject to termination for:

- Misuse of Business Developer funding
- Violations of their lease or services agreement
- Failure to meet growth objectives
- Failure to fully disclose company financial information at the request of the Jump Start Business Developer/Garden City Downtown Vision