

## Introduction

### About the CFCR Coaching Program

1. Community Futures Capital Region (CFCR) is an independent not-for-profit organization working as part of the Community Futures Network of Alberta. CFCR is partially funded by Western Diversification, government grants, or other local funding partners, and is also partially self-funding.
2. CFCR small business coaching is an advisory program designed to assist small business owners in the rural communities of Parkland, Brazeau and Leduc Counties.
3. Coaching services are delivered in a virtual format via Zoom or on site in Stony Plain (when conditions allow) and are intended to assist you tackle specific areas of tension within your business or prepare you for business ownership.
4. Each session is 30-45 minutes long and offered as one-off sessions or as a series of up to 3 sessions around a specific topic. Currently these sessions are free of charge.
5. Once signed up for the CFCR Coaching Program, clients are asked to attend each session as arranged or give at least 48 hours' notice that they have to reschedule or cancel.
6. To best assist you, and keep the sessions as productive and focused as possible, we need to understand your business better and the challenges you are currently experiencing. To that end, please complete the form below. We also ask that you note the Privacy and Non-Disclosure Statement before continuing.

### Privacy and Non-Disclosure Statement

1. The detail of any personal and business information you share with us as part of the coaching process, will remain private within the Community Futures Network of Alberta (CFNA) of which CFCR is a member.
2. If coaching takes place as part of a funded program, we may be asked by the funding bodies to report overall statistics for quality purposes, such as the number of businesses we have assisted or coaching sessions completed. Occasionally, we may be asked to include the name of your business, the region you operate in, and the overall coaching focus. No identifying information such as CRA business number, owner name, or other contact information will be included.
3. Other than for the statistical reasons given above, your information will not be shared with anyone outside of Community Futures without your express permission. Personal and business information will never be sold to a third party. All business ideas discussed in session remain your own and will not be repeated outside of that session. All documents shared with CFCR as part of your session remain private. Any trademarks and intellectual copyrights remain intact.
4. If your business coach feels someone else can assist you better, they may either suggest you contact an alternative organization or individual or, with your permission, facilitate an introduction. These organizations or individuals are not affiliated to CFCR and the advice they provide are independent of CFCR. Before you decide to utilize their services, we advise you to ask them about any costs entailed, and what their privacy and non-disclosure agreements look like.

***Please sign below to confirm you have read and understood all items above and would like to participate in the Time for a Change Coaching program.***

**Signature:**

**Date:**

## Onboarding Information

### Business Information

<b>Your Name:</b>		
<b>Telephone Number:</b>		<b>Email:</b>
<b>Your Role in the Business:</b>		
<b>Name of the Business:</b>		
<b>Business Address:</b>		
<b>Business Website:</b>		
<b>Business Social Media Accounts:</b>		
<b>Business Status:</b>	<b>Sole Proprietorship</b> <b>Corporation</b> <b>Partnership</b>	<b>Non-Profit/Charity</b> <b>Franchise</b>
<b>Years in Operation:</b>		
<b>Is your business based at your home?</b>	<b>Yes:</b>	<b>No:</b>
<b>How do you sell your products or services?</b> (Online means you sell products or services directly from your website or other online platform. Offline means you only sell from a physical location): <b>Online Only:</b> <b>Offline Only:</b> <b>Both Online and Offline:</b>		
<b>Gross yearly turnover?</b> (If your business is new, what is your projected income for Year 1): <b>Less than 20k</b> <b>20k – 50k</b> <b>50k – 100k</b> <b>100k – 500k</b> <b>500k – 1m</b> <b>More than 1m</b>		
<b>Number of full-time employees:</b>	<b>Number of part time employees:</b>	

What products or services do you offer?

Who is your *typical* customer or client ie the type of customer you tend to see most?

### Coaching Focus

What are the **top 3** things you would like help with? (Only check 3 please)

Developing your business idea	Help with marketing
Market research	Planning or streamlining your operations processes
Writing a Business Plan	Creating a financial plan including your startup costs or cash flow forecasts
Finding funding	Finding customers
Advice on buying an existing business	Advice on buying a franchise
Finding, managing, or retaining staff	Soft skills like communication, organization, time-management, productivity, etc.
Book keeping	Creating an online business/website set up.
Developing your products or services	Pricing
Strategic planning	Risk planning
Something not included in the list above? Tell us about it:	

### Additional Questions

What's your number 1 goal for your business for the next 12 months?

What do you think is standing in your way to reaching that goal?

Anything else you think we should know before we get started?

***Finally, please tick the box if you are interested in receiving occasional email communications from us about future Community Futures programs or training events, we believe may assist you with your business. Thank you.***