

Apex Business Consulting

Contract start date 9-15-2021

Technical services provided

- Administration of the CLIMBER Fund
 - English, Spanish, Japanese, Mongolian, Polish, Russian
- In person visits with small businesses (evenings and weekends)
- Phone call campaign
- Email campaign
- Text messaging campaign
- Attend speaking engagements to promote the CLIMBER Fund
- Attend networking events to promote the CLIMBER Fund
- Attend community events: Pueblo Latino Chamber of Commerce 4th Annual Small Business Summit, Mi Casa Resource Center-Resilient Small Business Summit, Asian Mid-Autumn Festival, Latino Chamber of Commerce of Boulder Food Truck Fiesta
- Present the CLIMBER Fund at DSBO quarterly meetings
- Present the CLIMBER Fund at RTD's meetings

Review Checklist with Small Businesses to get them loan ready:

- Business/Personal Tax Returns 3 years
- Financial Statement
- Balance Sheet
- P&L Statement
- Verify credit score
- Verify good standings with SOS
- Verify DSCR 1:1
- Explanation of use of funds
- Review Articles of Inc, Articles of Org. Op. Agreement, Bylaws

Marketing of CLIMBER Fund

- Advertise on social media platforms: LinkedIn, FB, Website, Instagram, internal network

Lender Support

- Conduct survey to gather key information to start tracking the small businesses
- Constant communications with lenders to ensure small businesses needs and questions are entertained
- Assist the lenders with gathering the additional documentation from the small businesses to start and complete the loan application
- Weekly updates with the lender to track progress of small business applications
- Track via Google Docs status of small businesses (albeit approved, denied or additional information needed)

Reporting

- Quarterly report to Director of CLIMBER Fund
- Converse with CHFA on the latest program updates
- Ensure communication of program collateral is up to date and relevant

- Make recommendations for program improvement

CLIMBER 2.0

- Continue to engage small businesses throughout the State of Colorado
- Obtain contact database for all small businesses registered with the State of Colorado 6,000 and develop a marketing outreach campaign: Phone, Email, Text, and Postcard
- Implement SalesForce for tracking and reporting purposes
- Follow up with all incoming leads that will be generated by the State of Colorado TV, Radio, and Print advertising
- Onboard more lenders to the program
- Streamline communications with small businesses and lenders
- Try to implement a universal application process for all lenders
- Capture testimonials from small businesses who received funds
- Continue attending community events
- Convert CLIMBER collateral to various languages