

## FINANCIAL POISE WEBINAR SERIES **ADVISING THE START-UP 2016**

### SERIES OVERVIEW

The initial stages of the life of a business present novel and exciting challenges. While emotion, energy and great aspirations are the mark of a startup, financing, infrastructure and a grounded marketing plan are the fuel which propel a business forward.

Whether dealing with starry-eyed first time entrepreneurs or established professionals starting their own businesses, many of the principal concerns remain the same: (i) raising capital; (ii) finance and accounting; (iii) human resources; and (iv) developing and executing a marketing plan. As the market's taste for startups continues to grow, opportunities to participate, advise and facilitate their growth are plentiful.

Join some of the leading experts in this unique and growing field as they discuss- in plain English for the non-expert- the basics and the fundamentals of advising a startup.

As with all Financial Poise webinars, each episode in the series is designed to be viewed independently of the other episodes, and listeners will enhance their knowledge of this area whether they attend one, some, or all of the programs.

### EPISODE SUMMARIES

#### **EPISODE #1**

*Raising Capital: Negotiating with Potential Investors*

January 27, 2016, 2pm CST

The path from an idea to a startup is fueled by hard work, creativity and working capital. The latter, investment capital, is a necessity—but understanding how to raise capital is rarely a simple question. Before seeking investor funds, it is important to understand the market of potential investors and what they will look for before making an investment. Because startups don't have long track records, entrepreneurs must demonstrate an obtainable vision for future growth and an appropriate proposed use of requested capital. In turn, an entrepreneur must understand what it is that an investor may ask for in return—whether it be in the

form of equity or debt, or both. Understanding a startup's needs as well as the unique market for startup financing are imperative to advising a startup as they seek capital and negotiate with potential investors. This webinar provides the entrepreneur and his or her advisors with an overview of capital raising, and practical tips for negotiating with savvy investors.

## **EPISODE #2**

*Finance and Accounting 101*

February 24, 2016, 2pm CST

The backbone of any business, startup or otherwise, is strong finance and accounting. However, unlike more established businesses, startup employees often wear multiple hats. Even in the early days, where creativity clashes may prove common, the need to designate a responsible person and to develop a working finance and accounting system is paramount. Investors require detailed reports; vendors and employees require payment; and accounts receivable must be managed with great particularity. Whether this function is satisfied by one or several individuals within a startup, building the foundation for a business that will endure the challenges of growth requires that the company invest time and energy into its finance and accounting functions. This webinar provides the entrepreneur and his or her advisors with an overview of finance and accounting for startups, and practical tips for getting started.

## **EPISODE #3**

*HR 101*

March 23, 2016, 2pm CST

Although not all tasks are glory work, developing a functioning and responsive human resources function is the responsibility of any startup that hopes to make it out of the gate. Human resources is charged with running the company's internal functions, including—recruitment, safety, employee relations, compensation and benefits, compliance and training and development. Recruitment and training are particularly important as the startup gains financing and begins to invest in itself. This webinar provides the entrepreneur and his or her advisors with an overview of some of the basic functions of a human resource department, and practical tips for getting started.

#### **EPISODE #4**

*SEO/Social Media & Other PR 101*

April 27, 2016, 2pm CST

How does a young company build its brand and create buzz? Marketing and public relations in the twenty-first century almost certainly must include building a social media presence and understanding the ins and outs of SEO (search engine optimization). But marketing doesn't end there. Developing an approach is very much a matter of understanding a startup's target audience—and accordingly, a strategic marketing and PR plan is a necessity. However, and importantly, marketing and PR are often quicksand for the new business. While creativity is invited into the process, it is important to create a marketing budget and live within its parameters. Planning ahead will guard against wasted time and money, two assets in short supply for most startups. This webinar provides the entrepreneur and his or her advisors with an overview of some of basic marketing strategy for startups.