

# SCORE BOSTON APPLICATION FOR CHAPTER OF THE YEAR AWARD FOR FY16

## Summary

SCORE Boston has moved from being a consistently strong chapter with impressive results to being an outstanding chapter in both results and capacity, and we're poised to continue delivering these results well into the future. We have fostered a culture of providing excellent mentoring, guidance and workshops while building an organization of volunteers who enjoy collaborating and socializing with each other.

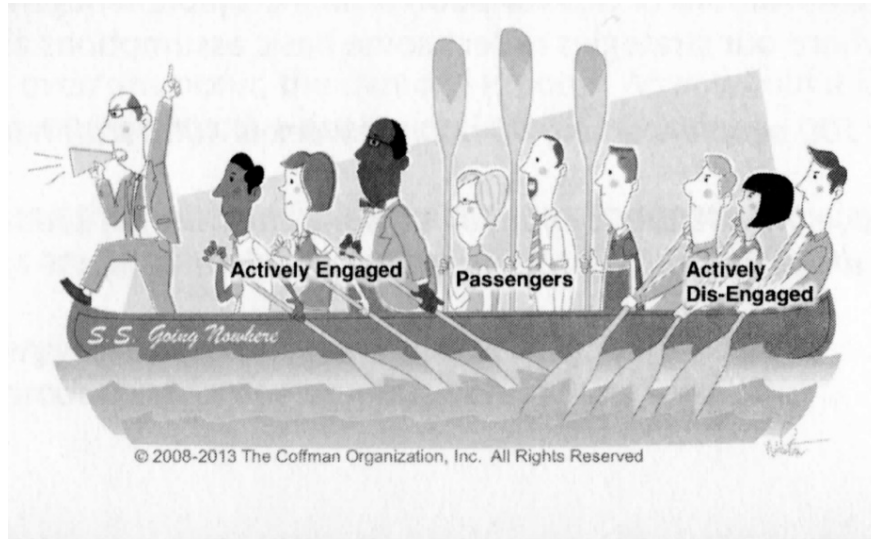
Our chapter has had strong and capable leaders for at least a decade. Our successes in FY15-16 were built on the solid foundation established by our predecessors, focusing on the needs of our clients and volunteers. While some chapters have accomplished impressive turn-arounds, SCORE Boston has steadily built on its historical strengths. We are fortunate to have several long-term leaders whose wisdom and experience is complemented by talented and energetic new members with fresh thinking and knowledge of current business practices and technologies. We have also been fortunate to have recruited a growing number of younger members making significant contributions to the chapter, one of which is helping us be more effective in trans-generational communication, so important to much of our client base.

More details are in the appropriate sections of our application, but here are representative highlights:

- Grew from 9 scheduled counseling locations to 18 in two years
- NPS increased from 84.63 to 87.34
- ~2x SCORE average rate of client businesses started and jobs created (normalized for chapter size)
- 67% increase in total chapter services – to 7422
- 32% increase in unique clients – to 2029
- 23% increase in mentor sessions – to 4944
- 200% increase in workshops – to 72
- 463% increase in workshop attendees – to 2478
- 307% increase in workshop attendee hours – to 6206
- 280% increase in women & minority volunteers in two years – to 19

## Culture

The NLC keynote in FY14 “Culture Eats Strategy for Lunch” caused us to focus on our chapter culture being as important as our strategy and knowing this is multi-year work. We recognized that our culture would be key to ongoing improvement. We changed our communication to a lot more asking members what they wanted and a lot less telling them what we wanted. In this context, and using the strategic objectives from the NLC’14 & ’15, we used the metaphor of rowing in the same direction (page 18 of the above book) as a basis for discussing our members’ alignment with our strategic objectives.



These discussions led us to emphasize six values:

- Client success
- Giving back
- Life-long learning and personal growth
- Distributed leadership and shared workload
- Collaboration in both mentoring and operation of the chapter
- Social interaction among volunteers

Striving for client success and giving back had long been key drivers for our members. We wanted to preserve these while bolstering enablers for these values. Taking a critical look at what we did well and what we could do better, we determined that strengthening four other values would yield near-term improvements for our clients, the chapter, and members while greatly enhancing the sustainability of the chapter.

In polling our members for what they needed, a consistent theme was more current knowledge of topics relevant to clients but which had evolved over time. Not surprisingly, a lot of this was related to technology, especially digital marketing, but also current practices in financing. We aggregated all of this under the heading of “life-long learning.” This also addresses a motivation for many of our members to stay current for their clients (and their friends). We emphasized this during recruiting so new volunteers understood that this would be an important aspect of their work at SCORE.

Aligning this stronger focus on culture with our strategic objectives to deliver more and better services to more clients led to the following. While these are treated below as separate initiatives, the reality is that they are part of an integrated “fabric” with many crossovers between culture and operations.

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### a. New branches: Moving out into the community

An important shift was to go where the clients are instead of having most of them come to our primary locations. During FY15-16, we doubled the number of branches where we do scheduled counseling (total branch count now 18). Most of the new locations are co-work spaces where the large majority of clients are “innovation-based” entrepreneurs who dream of being the next IT or life science powerhouse, contrasted with our more traditional entrepreneurs, who typically build local service and retail businesses.

We also opened branch locations at two facilities in Boston’s largest minority neighborhoods (Roxbury and Dorchester). This makes it easier to attract clients who may be uncomfortable coming into our main office in a downtown federal office building, where both the cost of parking and the security screening may be barriers. It also brings SCORE mentors into the neighborhood so they can get a sense of the environment for small businesses.

One ramification of diversifying our presence is that we have grown both the volunteer count and the skillsets needed for new types of clients. While we don’t need to be technologists *per se*, we do have to understand what they’re telling us in order to coach them on the business aspects of their chosen fields.

Some of our recent expansions are under the umbrella of the Venture Café Foundation, with locations at Cambridge Innovation Center, District Hall, Field’s Corner, and the Roxbury Innovation Center. We also reached out to St. Louis SCORE to connect them to the Foundation for its opening of the St. Louis Venture Café. The partnership between SCORE Boston and the Venture Café Foundation in Cambridge has served as a model for St. Louis SCORE, and for new connections, thus far in Miami, and soon in Providence.

Additional recent and ongoing counseling/workshop locations include: Cambridge Workbar, Boston Workbar, Staples Brighton Workbar (a pilot partnership among Boston SCORE, Staples, and Workbar), Fields Corner Business Lab in Dorchester, Boston Public Library’s Kirstein Business Library, Newton Free Library, Framingham Public Library, and Natick Public Library. We have a queue of many more potential branches (including Regus with 17 offices in Greater Boston) which we will selectively add as chapter resources grow and give us more capacity to handle the increased client demand.

A critical element of our branch selection process is a commitment by the new location to promote our services to their constituents. This acts as a multiplier to our own chapter promotion and has been an important contributor to the growth of chapter services in FY15 and FY16.

Ironically this expansion has posed challenges to the chapter’s collegiality. With more members meeting clients in more branch locations and offsite, there are fewer opportunities for interaction in our main office. In addition to fostering more co-counseling especially at branch locations and planning more social interactions, we have changed the format of our bi-monthly chapter meetings. They now include a workshop segment in which small groups of members work together on the focus issue of the meeting. Members have responded enthusiastically, and we’re seeing a higher percentage of members at each meeting. We encourage informal interaction following the meeting by providing lunch in the meeting room. The Exec Committee meets monthly instead of bi-monthly and we are re-thinking how we organize and operate our committees and project teams.

### b. Operating Like A Business

Over the last six-plus years, we have been operating more like a business, partly because our more recent members think that way, and partly because of tools and capabilities from National and the chapter. We

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are managing more “by the numbers” and analytics are more an integral part of our culture and operations. Using CORE reports (with much-improved data integrity) plus extracts from our local operational software, we can review and act on metrics that are important to our business. We have a committee for Reporting and Analytics, providing management-oriented information to chapter leadership.

Historically, much of our metrics were based on activity (i.e. Inputs), but we want to grow the information on “Results” or “Outputs” – partly using this same emphasis from National and partly based on local initiatives that could yield more frequent and finer-grained information across a larger part of our client base.

Our interest in analytics supports our central focus on serving clients effectively. We believe that if we do the right things for clients (and volunteers), “good numbers” will follow. We monitor the numbers to measure how well we are serving our constituencies, not for the sake of running up high scores.

While we review “traditional” metrics for unique clients, mentoring sessions and hours, new clients and follow-ups, workshop count and attendees, and NPS, we also dig deeper with Pareto charts and histograms to understand how our mentoring efforts are distributed across our membership and how effectively we utilize our volunteer resources across our many locations.

### c. New Volunteers and Their Onboarding

The core part of our onboarding process is pairing provisional members with well-regarded and experienced mentors, not only during the Provisional Membership period but often well beyond. New members co-counsel for 8-10 days with other experienced members, initially as “second chair” and then taking the lead after a few days’ experience. These 8-10 days (usually over a two-month period) include about 30-40 client sessions as well as training on our client intake and scheduling process and CORE software. During these sessions, new members see the SLATE methodology firsthand and see the styles and approaches that different members use with clients. The experienced members provide feedback to both the new members and their mentors, and when the process is completed, the mentor presents the evaluations to the Exec Committee to vote on accepting the Provisional Member as a full Active Member. To help members connect faces and names, we have a “rogues’ gallery” of headshots and names in our main office near the intake/scheduling desk (available to members but not clients).

### d. Skill Growth/Lifelong Learning

We have strengthened mentoring quality. Using NPS data coupled with situational awareness of client sessions, we worked with counselors with either major negative client feedback or those with consistently below-par ratings. We used coaching and guidance, but where warranted, we have also asked selected members to resign. One indication of the combined effectiveness of these actions, continuing education/skill building, and a comprehensive onboarding program has been a chapter NPS rating of 87.34%, a 3.3-point increase for FY16 over FY15.

We have taken a multi-pronged approach to continuing education for our members, and as noted above, this has contributed to both improved ratings and greater competency and self-confidence. The approach includes having a training topic at every chapter meeting presented either by a chapter expert or an external expert, some of whom we have also used for client workshops. We recommend to our members that they attend any client workshop on a topic for which they’d like to have deeper knowledge. We continue to grow and update our chapter’s long-term online knowledge base with short papers and workshop slides that we can share with clients as well as teach ourselves, and we are growing a small

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library in our main office with recent business books for members to borrow. We continue to increase the amount of co-counseling, which almost always benefits the client and lets mentors learn from each other's subject-matter expertise and approaches. That improves our ability to match clients with appropriate mentors, both initially and throughout the course of our mentoring relationships with our clients.

### e. Increasing Diversity

We also addressed diversity, significantly growing our mix of women and minority volunteers as well as adding much younger members. Many of those new volunteers have taken on leadership positions. While we are pleased with these results, we continue to seek a more diverse membership that will more closely reflect the chapter's mix of clients.

### f. Building Camaraderie

We've taken the collegiality that has always existed to a new level by fostering more social interaction among members, ranging from "appreciation" events that include spouses/partners to individual couples becoming friends outside of SCORE, and some members regularly doing sporting events together. All of this has built a stronger, more cohesive organization in which members enjoy being engaged.

### g. Volunteer Recognition

Our volunteers want to "make a difference" so one of our key aspects of volunteer recognition is sharing the estimates provided by National for Businesses Started, Jobs Created, and Businesses Grown. At the chapter level, this recognizes our collective impact, and with the individual mentor impact report, we can take this to the individual levels.

In addition to presenting National's service recognition certificates and pins at chapter meetings, we periodically highlight outstanding mentoring service to clients. We do this partly by having our best mentors teach the rest of us how they do what they do. We are starting to do stratified NPS recognition for mentors with outstanding feedback (>95%). We also created and present special awards for exemplary non-mentoring performance by our volunteers. One example is the "General Patton Award" to the volunteer who is leading the chapter's aggressive branch expansion noted above. Another is the "Unsung Hero" award presented to our non-mentoring administrator, who tirelessly keeps our systems, tools, supplies and office humming smoothly. These not only recognize major contributions by individuals or small teams but also set a tone and example for other volunteers to emulate.

### h. Sharing the Load

We recognized that historically our strength and performance depended on too much of the workload being carried by too few of our members. Potential leaders were reluctant to take on such roles because they saw the disproportionately large workloads carried by chapter leaders. The good news was that our members loved what they were doing in working with clients, and it was fairly easy to make the case that we needed many more members to share the non-mentoring operational workload if we were going to be able to continue doing the work that we loved doing for clients.

The solution we opted to try was chapter co-chairs in FY15 coupled with promising vice chairs and strong committee leaders. That worked well, and in FY16 we made all chapter officer positions as "co's". We actively recruited for leadership and began quickly putting promising new members into roles with significant responsibility and impact on the chapter. This has deepened the leadership bench to a much

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greater extent than previously. One aspect of that depth is increased resilience. We have had a few situations where someone in a leadership role has had to step down, and the co-leader model has enabled us to continue our operations seamlessly while we found an appropriate replacement. This has been aided by a shared commitment across the chapter to step up and pitch in when asked.

Increased collaboration among mentors, leaders, and the Executive Committee has made it easier to get the work done, generally achieved better results in that work, and made the work more enjoyable.

### i. The Unifying Impact of Software

While software may not seem to be an element of culture, it is the “operational glue” that binds us together and makes collaboration and life-long learning more easily done. Well before CORE, one of our now-emeritus members wrote two important software programs – a client scheduler and a relatively simple knowledge base. Over the last five-plus years our terrific volunteer lead IT developer/supporter has greatly enhanced these programs, rewriting them in current languages and thoroughly documenting them. “Enhancements” understates the rich feature-function set in current versions of the software, which enables us to easily, quickly and flexibly schedule clients based on mentor skill sets and preferences, check client histories of appointments (also enabling us to cross-check that CORE sessions were entered), find availability of mentors by date and by 18 office locations, email chapter-wide to all volunteers, email clients with specific extracts from our knowledge base, post and view scheduled chapter events including all workshops, provide onboarding/training for new members, to name a few capabilities. The enhancements also enable clients to self-schedule using brief profiles of scheduled counselors to help clients choose a good match to their needs; self-scheduling has been piloted in some branch locations and will likely be rolled out across most locations during FY17, with volunteer-assisted scheduling remaining an option. These capabilities keep our volunteers in the loop and enable any of us to view, initiate, and selectively change content from any Internet-connected device. This greatly fosters our culture of collaboration and responsiveness – to clients and each other.

### j. Goals vs. Performance

In earlier years when we were setting numeric goals for the chapter, we sought moderate gains year-over-year with the intent of beating those goals. In FY16 we set several stretch goals with most volunteers buying into achieving these – and we beat them! The biggest single stretch for us was to greatly expand our local workshops, going from 24 to 50. We ended FY16 with 72 workshops and grew attendees over 5x from 440 to 2,478. And we believe the processes we used will make this sustainable.

*See next page for table of metrics at National, District 101 and Chapter 0020 levels.*

### k. Culture Summary

In summary, our culture has evolved and strengthened over many biannual cycles of leadership. One hallmark of this culture is our ongoing self-examination and periodic “re-invention” of who we are and how we serve our clients. And by evolving, we have been able to provide a tremendously gratifying experience for our volunteers. This in turn helps us to attract larger numbers of excellent new volunteers, providing excellent services for our clients and making the whole chapter even stronger and more sustainable.

### FY16 Totals and % Increases, FY16 vs. FY15

	Mentor Sessions Count	Workshop Count	Workshop Attendee Count	Workshop Attendee Hours	Total Chapter Services	NPS
<b>National - all Chapters</b>	303,812	12,893	237,712	756,725	541,524	82.26
	+11.4%	+8.8%	+5.4%	-25.6%	+8.7%	+1.9 pts
<b>District 101</b>	12,429	310	5,383	14,783	17,812	85.34
	+12.2%	+96.2%	+96.3%	+76.2%	+28.9%	+2.0 pts
<b>Chapter 0020</b>	<b>4944</b>	<b>72</b>	<b>2,478</b>	<b>6,206</b>	<b>7,422</b>	<b>87.34</b>
	<b>+23.3%</b>	<b>+200.0%</b>	<b>+463.2%</b>	<b>+306.7%</b>	<b>+66.8%</b>	<b>+3.2 pts</b>

Source: Dashboard Reports (National, District 101, Chapter 0020) Oct 1, 2015 thru Sep 30, 2016 Downloaded: Jan 16, 2017

## Merit Achievement

Entering FY16, we recognized many challenges to continue moving the chapter “**From Good To Great**” including culture elements discussed above. Our FY16 Action Plan listed challenges. The performance table on the previous page shows that we did indeed make major progress on many of these challenges. That said, these challenges are ongoing as we strive to make a continually bigger impact on the Greater Boston communities we serve. We briefly discuss each of these below, noting that these challenges and their solutions are overlapped and don’t stay neatly in their “boxes.”

**Client Workshops:** While our performance overall in FY15 showed significant growth in most important metrics, we had slipped in the number of workshops and attendees. For FY16 we set a stretch goal of increasing our workshops to at least 50 (from 24 in FY15) with a corresponding growth of attendees. One of our then-Co-Vice-Chairs (now Co-Chair) assembled and led a strong team to develop and deliver sustainable and scalable answers to this challenge. As noted earlier, we beat these goals: 72 workshops (up 200%), 2,478 attendees (up 463%), and 6,206 workshop attendee hours (up 307%). At NLC’16, SCORE Boston received the NE Region’s award for most improved workshop program. For all our internally-developed workshops and for most of our externally-developed, our chapter’s knowledge base now has PPT decks (many with speaker notes for volunteers to use) and PDF versions for attendees. This enables us to replicate these workshops more easily in multiple venues, attract new clients, and make our SCORE brand more broadly recognized in the Greater Boston area.

**Being relevant** to our clients: Our life-long learning and skill building process, coupled with bringing on new volunteers having deep skills, and augmented by our onboarding process is keeping us relevant. This is borne out by our improvement in NPS, our sessions and hours and our workshop attendance.

**Capacity building** to serve clients and **Inclusivity** within chapter: we grew net Active + Provisional members from 56 to 68 in FY16. (Quality is discussed below in Outcomes and Successes). While we have greatly grown the number of our women and minority volunteers to 19 (10 women, 3 women minorities, 6 minorities), we still are well short of our goals to better align our makeup with our served communities. We recently submitted a grant proposal to support actions that we think will boost our visibility and benefits to both prospective volunteers and clients in minority communities.

**Image and reputation** in the communities we serve and want to serve: Our aggressive branch expansion has helped as has an active outreach to both city and state agencies and legislators and redesigning a more attractive, user-friendly web presence. One anecdotal measure that we are becoming better known is the apparent increase in the number of non-clients and prospective clients who have heard of SCORE and have a favorable opinion of us.

Building greater **client demand**: Our marketing team is engaging in more digital marketing using social media and leveraging an in-kind contribution of Google AdWords. As shown in the ending-FY16 Dashboard Report, our Unique Clients were up by 32% and as noted above our workshop metrics have grown a huge amount. We think the biggest boost has come from “going where the clients are” and we are continuing that expansion. Promotion of SCORE by these hosts augments our own promo. And all workshop attendees new to SCORE are personally contacted to promote scheduling individual mentoring.

**Community partnering and collaboration:** Our strong partnership with the SBA’s Massachusetts District Office (where our main office is) results in multi-faceted benefits of exposure, education, easier access to lenders for our clients, and much broader awareness in the banking and finance community due to our hosting of the annual SBA Awards Luncheon during Small Business Week. Our close collaboration with



## Merit Achievement

Constant Contact via their educational workshops at their headquarters has made us more visible and engaged with a much larger set of prospective mentoring clients. Our collaboration with Venture Café Foundation and Workbar is yielding branch expansion and client demand boost. We are exploring other collaborations with ethnic chambers of commerce. We have also made a strong effort to meet with all our Congressional delegation and our local political leaders to get the SCORE brand recognized and supported in those circles.

**Volunteer Engagement:** We needed to tie the cultural shift in with strategy and operating plans to deliver great results for our clients. We used multi-year tracking of the Volunteer Engagement Survey to confirm that we were making real progress in changing the chapter's sentiments about where we were heading and how we would get there, both locally and in alignment with National.

**Sustainability** of the chapter: As explained in Culture above, our "co-officer" model, coupled with committed, energetic, and talented recent volunteers has given us a deep leadership bench. In addition to a full roster of officers and committee/team leads, we have high-energy and engaged volunteers with both good ideas and the willingness to follow-through on implementation.

**Financial support** (beyond allocation from National/District): The last three years we have been hosting the SBA's Massachusetts District Annual Awards Luncheon, and undertaking the financial risk of the event. In addition to selling tickets that cover part of the cost of the event, we have successfully solicited sponsors each year (typically regional banks), and that sponsorship has resulted in a net surplus. Those funds supplement our allocation from National and the District and enable us to cover high operating expenses (largely because of reimbursements for volunteer parking at our city locations) while underwriting new programs to broaden awareness and demand for our volunteer services.

### Financial Management

In FY16 we began implementation of a comprehensive financial management system to enable much better understanding of how our money is spent and projected year-end results so that we can smoothly manage our funds and avoid surprises. In prior years, with National having part of our expenditure details in its records but not accessible to chapter management, we only had detail records of expenses paid directly by the chapter. Now as an early adopter of the new accounting system being promulgated by National and with access to all our records, we can generate standard and *ad hoc* management reporting needed to operate like a well-run business. This accomplishment is the result of commitment and intense work by our two co-treasurers, and is a much-appreciated boon to chapter leadership.

### Results

Because many of the metrics used by National, the District and the Chapter speak more concisely to our achievements, we are including the FY16-Year-End Dashboard Report on the next page. Those metrics are quantitative corroboration of much of the foregoing narratives on Culture and Merit Achievement.

## Merit Achievement

Metrics	Selected Fiscal Month		Year-To-Date		YTD Change	YTD % Change
	Sep 2016	Sep 2015	FY 2016	FY 2015	vs. 2015	vs. 2015
Client Data						
Total Unique Clients Served	272	236	2,029	1,536	493	32.10%
Total Unique Clients Served Local Mentoring	261	230	1,977	1,500	477	31.80%
Total Unique Clients Srvd Nat Email Mentoring	11	6	52	36	16	44.44%
Total Unique Clients Served Local Workshops	N/A	N/A	N/A	N/A	N/A	N/A
Total Clients Served - National Workshops	N/A	N/A	N/A	N/A	N/A	N/A
Sessions / Workshops Data						
Total Mentoring Sessions	423	406	4,944	4,009	935	23.32%
Total Workshops Held	5	3	72	24	48	200.00%
Total Workshop Attendance	101	51	2,478	440	2,038	463.18%
Total Attendee Workshop Hours	253	226	6,206	1,526	4,680	306.68%
Total National Workshop Attendance	N/A	N/A	N/A	N/A	N/A	N/A
Total Chapter Services	524	457	7422	4449	2973	66.82%
Follow On and Quality Data						
Client 'One & Done' Rate - YTD			57.07%	54.40%	2.68%	4.92%
Session Follow On Rate	72.58%	70.69%	66.14%	68.87%	-2.73%	-3.96%
Net Promoter Score (NPS)	89.19	74.42	87.34	84.63	2.71	3.21%
Long Term Clients (3 hours mentored)	29	21	558	128	430	335.94%
'In Business' Clients %	38.60%	36.02%	33.27%	29.97%	3.30%	11.01%
Client 'One & Done' Rate - Lifetime Historical	59.19%					
Volunteer Data						
Active Volunteers	70	18	75	37	38	102.70%
New Volunteers	1	0	22	17	5	29.41%
Volunteer Certification %	90.00%	72.22%	88.00%	78.38%	9.62%	12.28%
Volunteer Certification % - Active Only	96.88%	70.00%	96.88%	81.82%	15.06%	18.40%
% of Women & Minority Volunteers	24.29%	38.89%	25.33%	32.43%	-7.10%	-21.89%
Total Volunteer Mentoring Hours	428	492	5,469	4,628	841	18.17%
Run On: 01-16-2017	Report:	Dashboard_Report_Chapter.rptdesign			Page 1 of 1	
	Source:	core_dw				

## Outcomes & Successes

### Client Impacts

As noted we continue to push for more information on how our services create positive results for our clients. The Annual Client Impact Survey gives us valuable info, albeit a small sampling of our clients (about 13% responded to the FY15 survey) and only once per year. Since we have not yet received the results from the FY16 survey concluded in December, the results here are from the prior FY15 survey received in March 2016 and the FY15 Business Builder Report received in April 2016.

In FY15 SCORE Boston was credited with helping to start 490 new businesses and create 573 jobs. For that period, our volunteer membership was about 0.5% of National membership, and the above business starts and jobs created were about 0.9% of those created nationally. In other words, SCORE Boston's imputed "productivity" was about 1.8x higher than average volunteers nationally.

Similarly, the FY15 Business Builder Report attributes a total of 5220 businesses and jobs that we helped create between FY12-15 or 1.15% of those nationally, or >2x the national "productivity."

The quality of our work is reflected in our NPS increase (discussed earlier and well above the National average), our Client Engagement Index of 4.08, and our Volunteer Engagement Index of 4.70 (tied for 6<sup>th</sup> highest), and our 66% follow-on rate. We actively engage our clients to build long-term relationships, and their continuing engagement with their mentors is a *de facto* indicator of the clients' perceived value.

While these quantitative metrics are important and provide moderately objective feedback, we train our mentors to get qualitative feedback at EVERY session. We generally do this during and near the end of each session by asking the client if they're getting what they intended, whether it's useful for them, and what we can do to be more helpful. Because this is verbal and F2F, it's generally not captured as part of client session information, so we are exploring ways we might get and capture this more systematically. The intent is to get NPS-like feedback but more continuing throughout the client relationship and at a higher response rate than we experience with the actual NPS surveys or the Client Engagement Surveys.

**Feedback From Our Clients** excerpted from our chapter [website's testimonial page](#):

*"Before I met my SCORE mentor, I'd worked at a lot of jobs and was really a hard worker. He taught me how to work smart."*

*"We achieved more in an hour and 20 minutes than I have with anyone I've spoken with to this point."*

*"Thanks again for the time you make to pass on your wisdom to the next generation. I look forward to our next meeting."*

*"I must say that I have gotten some amazing insights and valuable feedback from you."*

*"You take me to a place where I am always surrounded by support and hope... It is mentors like you that truly make a difference in both personal and professional lives."*

*"It was fun to talk about something that we knew little about and explain it to someone who had all the right questions."*

*"I came away with some great ideas and have already put them into my plan."*

## Outcomes & Successes

*"I really feel more confident when I run things by you... I greatly benefit from the insights you provide."*

*"I found my meeting with my mentor to be incredibly helpful and insightful. He was able to steer me towards resources that will be helpful to me and he offered suggestions and follow up that are useful."*

*"You have inspired and challenged me!"*

Client Success Story examples are included in the following appendix, and the client business names are linked to their websites for further information about their businesses.

## Client Success Stories - Appendix

### The Dinner Daily – Laurin Mills

Laurin Mills came to the Boston SCORE office on June 16, 2010 with an idea for a subscription based menu service based on her own experiences as a working mother. The initial idea, for what has become the Dinner Daily, was to save homemakers time and money by offering a unique, web based, weekly menu service that answered the frequently asked, and often frustrating, question “what’s for dinner”. What made the service unique was that the service would provide simple, healthy menus, based on what items were on sale that week at the grocery store where the subscriber did most of her grocery shopping. Moreover, in addition to menus based on what was on sale, the ingredient shopping list would be grouped by category, saving the homemaker not only an estimated \$80 per week, but also time in the grocery store.

From that first meeting Laurin has worked with, and continues to work with several Boston SCORE mentors as she has grown the Dinner Daily from an idea to an award-winning business with subscribers all over the continental United States. During this time, Laurin has met all the challenges of a typical startup, including: limited funding; product, software, and infrastructure development; messaging and marketing; pricing; customer acquisition and retention; building the nucleus of a professional organization, and creating a product roadmap for future enhancements to the Dinner Daily.

Today, the Dinner Daily has a complex platform integrating multiple databases that enable automatic, client-specific menu creation based on the items on sale that week at the grocery store that the subscriber prefers, and customized to the specific types of foods or menu preferences selected by the subscriber. Currently the databases include over 36 grocery store chains in 49 states (with plans to cover 70% of all grocery stores in the United States this year). And her subscribers include both clients that have signed up for the service via her marketing efforts on social media and the internet as well as a growing number of corporate wellness clients, including: [monster.com](http://monster.com); Arbella Insurance; Ocean Spray; Holy Cross College, and Jefferson Memorial Hospital.

The viability of her business model and successful product launch has won Laurin and the Dinner Daily multiple first prizes and monetary awards from Boston and regional Small Business competitions. Today through Laurin’s tireless efforts, supported by her mentors from the Boston SCORE chapter, the Dinner Daily is growing at a geometric rate.

Laurin provided this testimonial...

"Since the time The Dinner Daily was just an idea, Stewart Sims has been a steadfast source of support for The Dinner Daily. He has helped us in all aspects of my business, most notably marketing and promotion, but also with operational issues as we scale, negotiating client contracts, and even some of the more sensitive issues that come with building a team. Stewart always offers advice in a supportive, yet honest manner and whenever I am faced with a tough business decision, he is one of the first people I turn to for advice.

We have also worked closely with Greg Ross out of the Boston office, and he has helped us immensely on navigating complicated technological decisions as well as interviewing potential candidates for hire. Most recently, Greg facilitated a strategic planning session for our team as we got ready for 2017. Our entire team benefited from this session.

I have often said that if it was not for the support and experience of Stewart during those chaotic and tumultuous first few years of the business, I truly do not know if The Dinner Daily would have made it. Now, as we prepare to seek external funding and grow our team to over a dozen employees, I am beyond grateful for the contribution of the Boston SCORE office. It is a gem for every new business owner and I tell entrepreneurs about this amazing resource every chance I get!"

## Client Success Stories - Appendix

### [Hayward Photography](#) – Everett Hayward

Specializing in memorable school photos, senior portraits, commercial photography...

Everett wrote this testimonial...

“Several years ago, when I first met Paul Waldeck, my SCORE advisor, I was quite impressed. He had an extensive business background in sales, and as a top manager/owner of a variety of businesses. He was genuinely interested and very eager to learn how he could help me with my business.

He asked me very pertinent questions about how I got started, my business plan, our clients, the sales, my costs, and my goals for the future. Initially I didn’t have all the answers, but he was patient and kept asking questions.

We analyzed many business statistics in detail; our sales, our costs, and the obvious – the net figures. He was very positive and persistent about the details, so we kept meeting over the next couple of years to fine-tune and target how we could increase the bottom line. He helped us identify a more efficient way of hiring personnel as well as many strategies that would increase our client base with less cost.

Many of his suggestions helped improve our sales procedures tremendously. Our sales team changed strategies from sending out emails to making personal calls. This is a tough strategy to implement on an ongoing basis for most people. Only then can you truly find out the specific needs of the client by asking questions, and demonstrate how you can fulfill their needs. This is a basic tenet of any successful business; put potential clients’ needs first, not yours. His specific advice was keep it simple, keep it short, and respect their time. Simply offer honest solutions to solve their problems, fulfill their needs, and make them happy.

His other suggestions were to get referrals from your own happy clients. We had a gold mine of directors, school administrators and many thousands of e-mails from clients saved over the years doing business.

Paul also helped us develop a strategic plan for follow-up of the sales calls and e-mail marketing. His suggestions and recommendations were very personal; stay in touch with the client on an on-going basis to form a relationship.

I recently called Paul for advice on writing our Blog. This is probably one of the biggest areas where many photographers in business fail... keeping up with writing interesting content on a regular basis. My roadblock was writing in a way to help others without “giving away the farm.” His advice, simply “write from the heart” – and have your wife review it. He hit the nail on the head! Besides, it’s good advice for anyone who’s married!

Using SCORE is a valuable experience for anyone who wants to improve their business in any number of ways. I can say that the business advice helped us reach a large sales goal we had set for ourselves, and helped to increase our sales by 15% or more. It’s like having a business consultant on call.”

### [Roman Music Therapy Services, LLC](#) – Meredith Pizzi, Founder & Executive Director

Meredith first came to SCORE Boston in 2009 as a solo board-certified music therapist (MT-BC). Since then she has grown her business to include 11 professionals and 3 administrative staff. She has evolved from an accomplished MT professional to a savvy, astute woman entrepreneur in this field. Her revenues and net profit have grown consistently with staffing, and she is on-track for sustainable growth.

## Client Success Stories - Appendix

As the premier independent music therapy agency in Massachusetts, RMTS has set the standard within New England and nationally for community-based and contractual music therapy services. Successes include expanding access to music therapy services for individuals throughout the life span, partnering with municipalities, state agencies and private businesses and organizations to improve the lives of children, adults, and seniors through goal-driven, meaningful music therapy services. Current service mix includes clients as young as weeks old to adults beyond their 100th birthday. Contracts range from one-time events to ongoing music therapy services for small and large organizations.

A nationally recognized leader in music therapy entrepreneurship, Meredith brings more than a decade of clinical and business experience to the organization. Her focus on building a sustainable and reputable organization has guided the growth of RMTS over the past 10 years. As a recently Certified Women Business Enterprise, and the sole source for music therapy in the state system, the business is seeing exciting opportunities for growth. In addition to potential large contract development, the music therapy center has recently relocated to a new space, doubling its footprint. Increased accessibility to highways, MBTA buses and the commuter rail opens RMTS to even more center-based services in its new, handicap accessible building. Human resources have also expanded in the past year with hiring their first Operations Manager and Senior Clinical Supervisor. This new leadership team has positioned the organization for even greater expansion.

Meredith wrote this testimonial...

"I have been meeting with my SCORE Advisor regularly for the last seven years and in that time, I have grown tremendously as a business owner. His experience in various facets of business management and leadership have helped me to consider the challenges I face in new ways. He has helped me to come up with creative and successful solutions to a variety of issues including time management, hiring and growing my team, cash flow and financial projections, and marketing my programs. His insights, experience and wisdom have been invaluable to me and the growth of my business. In addition, when there have been questions outside of his area of expertise, we have scheduled meetings with other SCORE Advisors who have significant knowledge in areas such as sales and insurance.

I can honestly say that without the relationship I've developed with my SCORE mentor I don't know where my business would be. His investment and commitment to the success of my business and me as a person has given me strength when I struggled, challenged me when I needed a push, and grounded me when I felt shaken by the up's and down's of owning and growing a business. Knowing that my SCORE mentor was on my side every step of the way gave me the courage, confidence, and determination to keep moving forward and stay open to learning.

I highly recommend SCORE to any business owner I meet as it helps you to separate yourself from the daily tasks in the business and take time to work on your business growth and strategies. It has been instrumental for me in the growth of my business and my entrepreneurial skills."

### Glow Skin Care – Shelley North

Glow Skin Care LLC is a boutique salon specializing in skin and beauty care and servicing Southeastern Massachusetts. SCORE has been working with Shelley North, the owner for over 6 years. In that time Shelley has greatly expanded the business and introduced new offerings. Glow is now recognized as one of the finest skin care salons in the North East.

## Client Success Stories - Appendix

Shelley wrote the following testimonial...

“SCORE has been assisting me in growing our business for several years. My mentor has been a great help in the healthy growth and continued success of the business. Thanks to SCORE’s support and direction over the years we have increased revenues by a factor of eight while enjoying ever increasing healthy bottom line results. We have increased our team to 18 and have won numerous Local and National Awards in our industry.

My mentor’s contribution in providing a sounding board and accountability for goals we jointly set is immeasurable. He has helped me understand the numbers necessary to keep my business successful, assisted in forming and maintaining HR policy, and generally been an effective cheerleader.

Being an entrepreneur is difficult and can be lonely. Having a SCORE mentor on my side is one of the best business decisions I have made.”

[SSG, LLC](#) (Software Solutions Group) – John Schaeffer and Jennifer Graves

John and Jennifer wrote this testimonial...

“Our experience with SCORE has significantly exceeded our expectations. From our first meeting, it was clear our SCORE counselors share so much more than just business advice. Whether providing valuable advice, asking the tough questions that no one else will, or giving words of support, they provide an invaluable perspective and tremendous support that enables us to persevere through the challenges we face in building a business. Above all and most importantly, they inspire and encourage us, giving us the confidence to make the hard decisions and take the important risks that every small business must to succeed. We are grateful for their time, value our relationship with them, and are honored to work with them. They have made a tremendous impact on us personally and on the strength of the company.”

In the years SCORE has been supporting SSG, their staff has grown from 3 to over 50, mostly technical. Like many small early stage software services companies, they had attractive opportunities aligned to their sector knowledge and skills but faced challenges about how to capture those and then deliver projects that they sold while funding and managing growth. They consistently experience profitable revenue commensurate with this size firm, and see a range of new opportunities for continued profitable growth.

A small group of SCORE Boston mentors acts as advisors to John and Jennifer, meeting with them regularly to review strategy, operations, customer relations and new sales opportunities, staffing and benefits, and financial performance.

SSG combines extensive subject matter expertise in public health and public safety with proven capabilities in Management and IT consulting. Their Core Services include Strategic Planning, Project Management, Business Process & IT Infrastructure Analysis, IT Systems Requirements Definition, and a full range of implementation, testing and support services.