

# Wisconsin Lieutenant Governor Small Business Academy

May 3-6, 2022



## May 3, Day 1:

- 9:00 AM **Welcome and Opening Remarks**
- Suzanne M. Zwaska, VP Community Affairs Manager, Corporate Social Responsibility, U.S. Bank
  - Missy Hughes, Secretary and CEO, WEDC
  - Wisconsin Lieutenant Governor Mandela Barnes
  - Sam Ridders, Deputy Secretary, WEDC
  - Eric Ness, Director, U.S. Small Business Administration (SBA), Wisconsin District Office
- 9:30 AM **Keynote Speaker:** Shannon Jefferson, CEO, Gibraltar Industries
- 10:00 AM **Show Me the Money: Locating Alternative Sources of Funding – A Panel Discussion**
- Description: Often more extensive and alternative funding sources are necessary to grow your business. Learn about various funding resources that help businesses access the capital needed to grow.*
- Moderator: Robert Lamb, Vice President/Project Manager, U.S. Bank
  - Tammie Clendenning, Lead Economic Development Specialist, U.S. SBA
  - Willie Smith, Executive Director, Northwest Side Community Development Corporation
  - Natanael Martinez, Regional Economic Development Director, WEDC
  - Michael Hetzel, Director of Lending, WWBIC
  - Maysee Herr, CEO, Hmong Wisconsin Chamber of Commerce
- 11:00 AM **6 Ways to Work with a Mentor – A Panel Discussion**
- Description: A mentor can be one of the most important assets of your business. Having and effectively working with a mentor can be the real difference maker when starting or growing a business. Learn how to work with a mentor to maximize the benefit of such relationships.*
- Moderator: David Kircher, Founder, Owner, and President, Phoenix Financial Advisors
  - L. Wesley McKenzie, Business Banking Specialist, U.S. Bank
  - Anna Steinfest, President and CEO, AFF Research
  - Terrence R. Moore, Business Development Specialist, Hmong Wisconsin Chamber of Commerce
  - Greg Martin, Business Consultant, UW – Milwaukee Small Business Development Center
  - Peter Bushman, Chapter Chair of SCORE West Central WI, SCORE Marshfield

## May 4, Day 2:

9:00 AM

### **E-Marketing: How to Get Started with Digital Marketing**

*Description: The ability to reach your online customers is critical to an effective e-commerce strategy. Learn how to develop an e-marketing strategy and web presence that will drive customers to your business. This session will provide insight and strategies to improve your search engine optimization (SEO) and help you connect to customers in new ways to improve your online return on investment (ROI).*

- Lisa Foster, Chapter Chair, SE WI SCORE Milwaukee
- Brian Alves, Mentor and Digital Marketing Lead, SCORE SE WI

10:00 AM

### **Cybersecurity for Small Businesses – A Panel Discussion**

*Description: Small business owners are aware of the risks posed by cybercriminals to their business, but do not know what technologies to invest in, what resources are available, and how to decide the best approach to protecting your business. This session will provide an overview of the tools to overcome cybersecurity threats.*

- Moderator: Aina Vilumsons, CEO, Wisconsin Procurement Institute
- James VanBushkirk, Account Executive, M3 Insurance
- Dele Ojelabi, President, Comcentia
- Dave Stamm, CEO, Stamm Tech

11:00 AM

### **Federal, State, and Local Small Business Certifications – A Panel Discussion**

*Description: Small, Disadvantaged, Women, Minority or Veteran owned business can receive an advantage when selling to various Public and Private entities. In most cases, a certification process must be completed to qualify. It is important for businesses to understand the certification requirements and the potential benefits to their business prior to investing their time and resources in the certification process. This session will provide an overview of these programs, application processes, describe eligibility requirements, as well as the benefits and obligations*

- Moderator: Jacob Perez, Region Director, SBTRC Great Lakes
- Shane Mahaffy, Lead Business Opportunity Specialist, U.S. SBA
- Tondra Davis, Program Director, Wisconsin Supplier Diversity Program
- Aina Vilumsons, CEO, Wisconsin Procurement Institute
- Shirlean Clayton, Certification Manager, Milwaukee County CBDP
- Nikki Purvis, Chief Equity Officer, Milwaukee Department of Administration
- Madalena Maestri, DBE Program Chief, WisDOT

## **May 5, Day 3:**

9:00 AM

### **Developing Financial Projections**

*Description: Understanding your financial statements can improve your operations and maximize your cash flow. Learn how to use financial projections to help manage your business and core financial ratios to help you become more successful at developing and deploying your financial strategy.*

- Corrie Kovacs, Business Technical Assistance Associate, First American Capital Corporation
- Luke Kempen, Director, UW-Eau Claire Small Business Development Center

10:00 AM

### **Financing Your Business: Getting to Yes! A Panel Discussion**

*Description: Learn about the importance of your banking relationship prior to your loan request. Be prepared with what is important to have before meeting with a lender. The ultimate goal is to get your lender to say "YES" to your request.*

- Moderator: Patrick Martin, AVP/Business Lending, Landmark Credit Union
- Terese Caro, CEO, Legacy Redevelopment
- Rick Zawacki, Loan Officer, First American Capital Corporation
- L. Wesley McKenzie, Business Banking Specialist, U.S. Bank

11:00 AM

### **Structuring Your Business: Things You Should Know – A Panel Discussion**

*Description: When starting or growing a business, there are many considerations that impact its financial position and operations. Actions you take can help reduce your risk and improve your financial situation. Learn about business entity options, actions to register and change your business structure, considerations when real estate is involved, health care, retirement, and other benefits for owners, business deductions, tax considerations, etc.*

- Ken Wundrow, Mentor and Workshop Lead, SCORE Madison
- Bill Ferguson, Mentor, SCORE Madison

## May 6, Day 4

- 8:00 AM      **In-Person Regional Programing**  
*Description: Regional in-person events will be held throughout the state on **Friday, May 6 from 8 a.m.-Noon**. The regional locations include: Milwaukee, Madison, La Crosse, Appleton/Oshkosh, Crandon and Eau Claire. You should plan to attend a regional event to gain access to regional businesses and technical assistance resources. Information including an agenda for the in-person locations will be sent in a follow-up email closer to the event. The in-person locations will also be streaming the SBA's 9:00 AM session **Resilient and Persistent: Wisconsin's SBA National Small Business Week Winners and How They Keep it Going**. Locations include:*
- Milwaukee: Schiltz Park
  - Madison: Madison College – Truax College
  - La Crosse: South Side Neighborhood Center
  - Appleton/Oshkosh: D.J. Bordini Center (Fox Valley Technical College)
  - Crandon: Forest County Potawatomi Community Center
  - Eau Claire: Pable Center at the Confluence
- 9:00 AM      **Virtual: Resilient and Persistent: Wisconsin's SBA National Small Business Week Winners Panel and How They Keep It Going**  
*Description: Meet SBA's small business award winners at this moderated panel, hear how they have navigated the challenges and opportunities of the past two years, and learn how they plan to move forward.*
- Moderator: Eric Ness, Director, Wisconsin District Office, U.S. SBA
  - Dave Heide, Chef, Liliana's Restaurant
  - Eric Coffman, President, Graftobian Make-Up Co.
  - Donisha Nesbitt, Executive Director, CoveredCare
  - Julia McConahay, Owner, Chrysalis Hair and Body
  - Teresa Peters, CEO and Owner, Backroads Coffee and Tea
  - Jeff House, President and CEO, OTIE
- 10:00 AM      **In-Person Programing Continues**
- 12:00 PM      **Program Concludes**