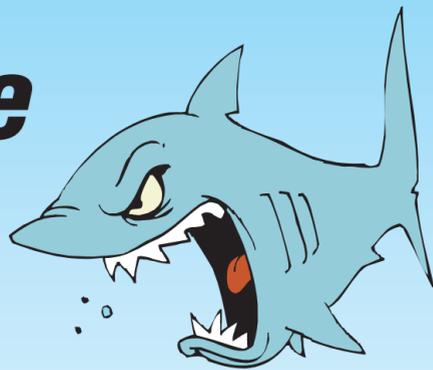


April 30, 2015

Enter the Shark Tank



Live Pitch Competition

April 30, 2015

3:15 - 4:45 pm • Great Northern Hotel

Come watch local entrepreneurs as they compete to win cash to start up their businesses! Participants will be selected from a pool of applicants and will "pitch" their business idea to a panel of investors, lenders, and business consultants for a chance to win \$5,000.



JUDGES PANEL

- Liz Marchi** – Founder of Frontier Angel Fund 2, a Montana angel investment company
- John O'Donnell** – Founder of Technology Venture Center at Montana State University and founder and executive director of TechRanch, an entrepreneurial incubator in Bozeman
- David Peretto** – Vice President and Commercial Lender at First Interstate Bank
- Paul Gladen** – Director of Blackstone Launchpad at the University of Montana
- Les Craig** – Director of Blackstone Launchpad at Montana State University
- Jordan Goldsmith** – Co-founder of Tampout, 2014 SBDC Shark Tank winner

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HELENA, MT 59601

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INVEST IN SUCCESS

Small Business Conference

Be the Best at What Matters Most

Registration Options

- \$95 Early Bird Registration before April 15, 2015
- \$125 Individual Registration
- \$35 Student Registration (Must Show Valid ID upon Check-in)

To register, visit

<http://www.regonline.com/investinsuccess2015>

Or call Brandon Orr, Conference Chair, at 406-447-6376



presents...

INVEST IN SUCCESS Small Business Conference

Be the Best at What Matters Most

April 29-30, 2015

Great Northern Town Center • Helena, Montana



April 29, 2015



Behind-the-Scenes Helena Business Tour

Join fellow conference attendees in an exclusive behind-the-scenes tour of Boeing Helena. This location of the world's leading manufacturer of commercial jetliners manufactures complex titanium parts for many models, including the new 787-10 Dreamliner. They recently completed a \$35 million expansion. Come take a look at their updated facility! SPACE IS LIMITED. Pre-registration required. Tours begin April 29, 2015 at 3:00 and 3:30 pm. Registered attendees will receive group meeting instructions.



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Networking Reception

Holter Museum of Art • April 29 • 5:30-8:30 pm
12 E. Lawrence St., Helena (East Entrance)

Get to know other conference-goers at the popular Invest in Success Networking Reception! Mingle with Montana entrepreneurs, local business resource partners, and members of the SBDC Network. Appetizers will be served, no host bar. SPACE IS LIMITED. Pre-registration required.



Sponsored and Hosted by...



April 30, 2015

INVEST IN SUCCESS Workshops & Presentations

April 30, 2015

Luncheon Keynote



Luncheon and Keynote Speaker Joe Calloway
Helena Civic Center • April 30 • 12:00-2:00 PM

Be the Best at What Matters Most What Effective Leaders Do (and How They Think) to Create and Sustain Success

Effective leadership isn't easy, but it's not a mystery, either. Consistently effective leaders in a range of businesses and organizations all tend to do the same handful of things. Based on his most recent book, *Be the Best at What Matters Most*, Joe delivers lessons in leadership from over 30 years of studying and working with the top performing organizations and applies those lessons to what success means in 2015.

About Joe Calloway

Joe Calloway helps business leaders and entrepreneurs make great companies even better. His interactive keynote presentations and workshops enable organizations to focus on what is truly important, inspire new thinking about challenges and opportunities, and motivate people to immediate action.

Joe has been a business author, consultant and speaker for 30 years and his client list reads like an international Who's Who in business, ranging from companies like Coca Cola and IBM to Cadillac and American Express. Joe also works extensively with small to mid-sized business groups including franchisees, medical practices, law firms, and a range of professional service groups.

BREAKOUT SESSION 1 • 8:30 - 9:30 am

Customer Driven Growth: Connecting Customer Experience to Business Growth

Joe Calloway, Keynote Speaker, Business Author & Consultant

Most companies "hope" that their customers are recommending them. That's their strategy. They hope. Market leading companies don't hope. They make it happen. They are intentional, strategic, and tactical about creating the positive customer word of mouth that drives new business to them. Customer Driven Growth is about getting clarity on exactly what you want your customers saying about you, then getting focused on the strategies that, when executed with consistency, will drive growth through customer experience.

Financial Management Tools for New Entrepreneurs

Justin Stolp, Service Corps of Retired Executives (SCORE)

An exploration of the tools and techniques of financial management for business. We will discuss the key points an entrepreneur needs to consider when managing topics such as payment collection, bookkeeping and financial reporting and introduce tools like Square, Worldpay, TurboCash, PayPal, etc. This workshop will also cover considerations for selecting financial management tools to improve business performance.

Revamp your Business Strategy by Understanding Montana's Economic Trends

Barbara Wagner, Montana Department of Labor & Industry

State economist Barbara Wagner will provide an overview of the Montana economy's current performance and future challenges and inform you where to find public economic and demographic data that could be useful for YOUR business. Want local information on customer demographics, income levels, or travelling patterns for your marketing plan? Do you need to know how much other businesses pay workers so you know you are paying fair wages? Come learn about Montana's economic environment while finding data to help make your business the best.

Taking a Product to Market

Angie Nelson, Montana Department of Agriculture and Angie DeYoung, Montana Department of Commerce

Do you have a product that you want to sell? Angie Nelson and Angie DeYoung will provide a practical approach to taking your idea and turning it into a marketable product. In this value-added workshop they will cover how to find who your target market is, costing production and packaging, production capacity, relative price point, distribution options, and much more.

BREAKOUT SESSION 2 • 9:45 - 10:45am

Exporting Panel: You Don't Have to Go it Alone

Matt Varilek, moderator, Small Business Administration

A panel of companies that are currently exporting their products/services as well as a representatives of the various federal, state, and private programs that businesses can utilize to sell their products and services to consumers outside of the United States. We'll present case studies that highlight these programs as tools that may be used to overcome specific challenges exporters face when they sell abroad. Exporters don't have to go it alone. There is an abundance of programs and organizations that want to help exporting firms sell their products and services abroad.

Design your Workplace for Success

Susan Boelman, Design Inspires

Design inspires workspace success. The real estate you occupy to conduct business is a valuable tool to support your business. In this workshop, Susan helps you discover the untapped potential of your interior workplace and explains how its layout and design affects your customers, brand, productivity, and profits. Innovative work spaces lead to business transformation and growth. A lively discussion for brick-n-mortar spaces as well as home studios. Start to view your workspace as an important platform to support another successful day in business.

Facebook for Business Part A: Managing your Page

Deanna Satre, Edge Marketing

Learn why it is so important for your business to have a Facebook page and then learn how to put it to good use. Topics covered include: best practices, tips for an engaging post, and how to manage your page and still have time to manage your business. We'll give you the click-by-click so you learn what to do and how to make it happen.

Planning for Growth in 2015: How to Build a Business Development Plan for the Rest of 2015

Mike Harkin, Fortis Coaching

We all want growth but are we willing to do the behind-the-scenes work to make it happen? This workshop will focus on some key practical steps you can take to fuel that growth in 2015. Not only will we identify what areas of your business need the most attention but how you can take concrete action right now to fix those problem areas. The end result—a more focused, results-driven company primed to meet your goals. Continues in Breakout Session 3.

BREAKOUT SESSION 3 • 11:00am - 12:00pm

Crowd Funding Panel: Turning Social Contacts into Dollars for your Business

Amita Patel, moderator, Montana Community Development Corporation, SBDC

Using crowd funding to raise capital for startups and growing businesses has proven to be effective. A panel of successful local crowd funding business owners will discuss what they did to raise money for their businesses using a crowd funding platform and give you ideas for how to take advantage of this growing trend.

Best Practices in Hiring and Firing

Connie Geiger, Department of Labor & Industry

There are numerous rules and laws regarding hiring and firing employees, and a wrong decision made by an employer can be very costly to a small business. The presenter will go over some common-sense guidelines for employers to safeguard themselves against potential liabilities and address general Unemployment Insurance benefit eligibility with an emphasis on discharges and voluntary quits.

Facebook for Business Part B: Managing an Ad Campaign

Deanna Satre, Edge Marketing

Now that you have a well-managed Facebook page, it is time to put it to use. First things first, you need people. Learn how to use Facebook ads to boost your Facebook "likes," website traffic, and more! Topics covered include: behavioral and demographic targeting, rules, and how to set your budget. We'll give you the click-by-click so you learn what to do and how to make it happen.

Planning for Growth in 2015 (continued)

Mike Harkin, Fortis Coaching

BREAKOUT SESSION 4 • 2:00 - 3:00pm

New Trends in Healthcare

John Doran, Blue Cross Blue Shield of Montana

This is the most transformative time ever in the health insurance industry. Learn how health insurance and the delivery of care in Montana is changing from Montana's largest and longest-standing health insurer, Blue Cross and Blue Shield of Montana. The presentation will center on the latest information regarding open enrollment on the Health Insurance Marketplace, the latest trends in employer-sponsored plans, and how new models of health care delivery focus on improving health outcomes for patients.

Marketing Effectively Using Digital Media

Lori Pederson and Deanna Satre, Edge Marketing

It is time to bring your marketing plan into the 21st century by adding digital media. Learn why your website should be responsive, what that means, what types of digital media exist and when to use them. Topics covered include: targeting efficiently to maximize your budget, email marketing, banner ads, search engine marketing, and social media marketing.

A Manager's Guide to Employee Retention and HR in Montana

Jim Nys, Personnel Plus Consulting

Managing people can be a stressful, high liability responsibility. Many managers have responsibility for managing a staff and may even be the designated HR representative in their organizations. This presentation will alert you to some of the things you should know when managing people in Montana so as to maximize productivity and minimize liability. Jim will address some of the challenges of managing under Montana rules and address new or proposed federal and state laws and regulations that may affect your organization and require action on your part.

Business Valuation and Exit Planning

Mike Size, Portside Valuation

This workshop will take into consideration valuation techniques used when determining what to buy or sell a business for. It will also cover strategies business owners looking to sell their business as well as entrepreneurs who are in the market to buy. Basic financial structures and strategies will be discussed.

Conference Agenda

7:30-9:00	On-site Check-in and Registration in Great Northern Hotel Ballroom Foyer
8:00-8:15	Welcoming Remarks
8:30-9:30	BREAKOUT SESSION 1 <ul style="list-style-type: none"> • Customer Driven Growth: Connecting Customer Experience to Business Growth <i>Joe Calloway, keynote speaker, business author, & consultant</i> • Financial Management Tools for New Entrepreneurs <i>Justin Stolp, Service Corps of Retired Executives (SCORE)</i> • Revamp your Business Strategy by Understanding Montana's Economic Trends <i>Barbara Wagner, Montana Department of Labor & Industry</i> • Taking a Product to Market <i>Angie Nelson, Montana Department of Agriculture and Angie DeYoung, Montana Department of Commerce</i>
9:30-9:45	Tradeshow and Networking Break
9:45-10:45	BREAKOUT SESSION 2 <ul style="list-style-type: none"> • Exporting Panel: You Don't Have to Go it Alone <i>Matt Varilek, Small Business Administration</i> • Design your Workplace for Success <i>Susan Boelman, Design Inspires</i> • Planning for Growth in 2015 <i>Mike Harkin, EMyth</i> • Facebook for Business Part A: Managing your Page <i>Deanna Satre, Edge Marketing</i>
10:45-11:00	Tradeshow and Networking Break
11:00-12:00	BREAKOUT SESSION 3 <ul style="list-style-type: none"> • Crowd Funding Panel: Turning Social Contacts into Dollars for your Business <i>Amita Patel, moderator, Montana Community Development Corporation, SBDC</i> • Best Practices in Hiring and Firing <i>Connie Geiger, Montana Department of Labor & Industry</i> • Planning for Growth in 2015 (continued) <i>Mike Harkin, EMyth</i> • Facebook for Business Part B: Managing an Ad Campaign <i>Deanna Satre, Edge Marketing</i>
12:00-1:45	KEYNOTE LUNCHEON , Helena Civic Center (transportation provided) Be the Best at What Matters Most <i>Joe Calloway, Keynote Speaker</i>
2:00-3:00	BREAKOUT SESSION 4 <ul style="list-style-type: none"> • New Trends in Healthcare <i>John Doran, Blue Cross Blue Shield of Montana</i> • Business Valuation and Exit Planning <i>Mike Size, Portside Valuation</i> • Marketing Effectively Using Online Media <i>Lori Pederson and Deanna Satre, Edge Marketing</i> • A Manager's Guide to Employee Retention & HR in Montana <i>Jim Nys, Personnel Plus Consulting</i>
3:00-3:15	Tradeshow and Networking Break
3:15-4:45	SHARK TANK EVENT
4:45-5:00	Closing Remarks, Shark Tank Results, Door Prizes

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