

SBDC Call — Agenda & Checklist

James Rogers

Meeting Objective

Focus the counselor on immediate cash flow, business set up for legal viability, partner connections, and actionable next steps

Agenda (30–45 minutes)

- Intro (2 min): Who I am; broken status in current term, LLC registered; veteran + background.
- Primary plan (5 min): Services-first revenue; cash event triggers, 3 tracks; partner-only real estate.
- Evidence (3 min): Capability Statement; publications; prior deployments.
- Resources ask (10–15 min): Channels to make capabilities known. Paperwork process to cash in bank. Ease and short cuts. ID some low hanging wins. veteran-owned certification; Opp Zone
- Projects (5–10 min): Partner-ready pilots (clean energy, education, etc); what's needed to activate.
- Next steps (3–5 min): Dates, intros, and documentation.

Handouts / Links

- Capability Statement (PDF) — /docs/capability.pdf
- Business Plan Summary (PDF) — /sbdc/docs/BusinessPlanSummary.pdf
- Website — www.jamesrogers.us (Services, Projects, About, Contact)

Counselor Deliverables (What I need from SBDC)

- Named intros to practical wins -> Get me off support programs. Health limits.
- roadmap for veteran-owned certification and set-asides.
- Enterprise Zone & Opportunity Zone, HUB, SAM, etc .
- Help getting into lists and increase possible wins.
- List of upcoming grants/solicitations aligned to education, veterans, or clean energy pilots.

My Commitments

- Provide financials and projections upon introduction (immune to 'money power' gatekeeping).
- Follow up with project briefs and timelines within 72 hours of intros.
- Share economic impact updates for SBDC reporting.

Risks & Mitigations (brief)