

U.S. Bank: Course descriptions and toolkit features

All toolkits help you apply the online course concepts to your business needs and contain a glossary of relevant terms.

Financial advisory and funding

► **Business financial health: Credit and profitability**

In this course, we'll explore financial management by looking at different ways to improve your overall business financial position. We'll discuss what you need to do to increase your creditworthiness and profitability so that you can scale your business and strengthen your financial future.

Toolkit features:

- Strategy builder template on repairing or maintaining your credit standing
- Snapshot of key financial ratios, how to calculate them, and what they tell you about your financial health
- Exercise to help you calculate the current profit margin for each of your products or services
- Pricing strategy evaluation
- Table to help you calculate revised prices that can net more profit while staying competitive

► **How to prepare to seek financing**

Securing financing for your business can feel like an uphill battle, and many owners are turned down for loans without ever fully understanding the reasons why. It can be a deeply frustrating experience, but there are things you can do to strengthen your chances in the application process. In this course, we'll shed light on the loan process, including what lenders are looking for as they review your application, and how you can evaluate and improve your financial standing.

Toolkit features:

- Self-evaluation to help you understand what lenders see when determining your financing prospects
- Review on financial statements and how to use ratio analysis to understand your financial health
- Exercise: How much loan can you afford?
- Checklist on what to include in a business plan that supports your financial goals

Growth strategies and procurement

► **Securing contracts with large buyers**

How can you compete and win contracts with large buyers, including government contracts? In this course, we'll cover how to assess which opportunities are right for your business and what to consider when proposing. We'll also discuss networking communication essentials and best practices to effectively use your connections to secure more opportunities and expand your portfolio.

Toolkit features:

- Opportunity scope of work analysis: Should you bid on this project?
- Exercise on how to calculate costs, set prices, and assess the risks
- Table to determine the value of a bidding opportunity
- Worksheet for planning your response to an RFP to stand out among the competition

► **Successfully pitch your business to anyone**

When you're an entrepreneur, you are constantly pitching and selling your business to others—to investors, potential employees, the media—you name it. How do you know if your pitch hits all the right notes? How do you get more comfortable doing it? In this course, we will explore how to create a pitch that turns heads and opens doors for you.

Toolkit features:

- Pitch self-evaluation to help you narrow down what to work on
- Template to help you create two distinct styles of pitching: the hook, and the persuasion
- Exercise to help you create or refine your pitch deck
- Extra copy of the pitch self-evaluation to help you note your improvement

► **Strategic partnerships for competitive bidding**

For a smaller enterprise, bidding on large contracts can feel like trying to play in the big leagues. How can you possibly compete with bigger, more established businesses and win? The answer lies in strategic partnerships. In this course, we'll explore how working with other businesses as a subcontractor can help you get in the game, increasing your competitive bidding power and sending more opportunities your way.

Toolkit features:

- Comparison table of two types of strategic partnerships: contractor/subcontractor agreements and joint ventures
- How to register your business if you're seeking government contracts: CAGE code, UEI, NAICS codes
- Template to create a capability statement to share with potential partners
- Activity to help you vet potential partners based on how they align with your business capabilities
- Checklist to help you build a successful partner relationship

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Legal

► **Protect your intellectual property**

Your creative property — including designs, products, logos, literary work, and established proprietary processes — is a central part of your value, and you want to safeguard it against competitors. In this course, we'll discuss how you can invest in your IP now to retain your competitive advantage and pave the way for business growth, boost your reputation, and create revenue from your innovations.

Toolkit features:

- Intellectual property inventory tracker
- Action plan to prioritize your IP assets and take steps to protect them
- Table to help you compare the cost of various forms of protection
- Activity to help you monitor your IP for infringement
- An optimization strategy to help you determine where you could profit from your IP

Marketing and advertising

► **Determining the best marketing strategies**

Businesses of any size have more options than ever when it comes to promoting and advertising their goods and services. From print to web to social and everywhere in between, the options can be overwhelming, not to mention expensive. This module offers a framework for determining your business's optimized communications channels to maximize the return on your marketing investment.

Toolkit features:

- Guidance on enhancing your marketing goals to align with the SMART framework and help you stay accountable
- Exercise to create or strengthen your company's value proposition
- Worksheet on the steps to conduct a competitor analysis to understand their digital presence
- Activity to create a digital marketing plan and calculate the return on your marketing investment

Operations

► **Business continuity planning**

Running a business means dealing with daily challenges. But what about the bigger obstacles you aren't expecting? In this course, we'll help you understand risk management, create strategies that will limit potential risks, and better equip you to respond to crises so you recover quickly and keep your business running.

Toolkit features:

- Activity to help you identify the various risks facing your business
- Business impact analysis (BIA) matrix to assess which risks you need to prioritize in your business continuity planning
- Template to take preventive measures against your identified threats
- A checklist of actions to take to create a business continuity plan that can support you during a crisis and minimize disruption

Technology

► **Protecting your business against cybercrime**

While cyberattacks affect companies of all sizes every day, they can be especially devastating to small businesses. This is why it's vital to protect your business and your customers' information from digital threats, and the first step is to identify your vulnerabilities. Uncover how susceptible you are to cyber threats and learn what preventive actions you can take to defend your business.

Toolkit features:

- Steps to assess your company's risk for a cyberattack
- Cybersecurity prevention checklist and action plan
- How to create an incident response plan (ISP) to be much better prepared to react and recover from a security breach
- Exercise to help you decide if you want to hire a professional to help you create a strategic prevention and response plan

► **Scale your business with AI applications**

With the latest advancements in artificial intelligence, businesses now have more opportunities to compete with larger companies through technology. In this course, we'll discuss three of the most effective ways to leverage AI, including using chatbots, automating workflows, and drawing on predictive business insights to drive better business decisions and growth.

Toolkit features:

- Goals worksheet to help you determine what AI application to implement first
- Provider criteria checklists list to help you select the right fit
- AI implementation plan to keep you and your team on track with your goals
- AI ethics best practices and self-audit