Certified Business Engagement Professional™ (CBEP) Course

Program Outline – Meeting Topics & Dates – Learning Outcomes

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Support Coordinator: Shayne Nelson Shayne@business-u.net

2020 National Cohorts	Start Date	End Date
SOLD OUT National Cohort 7	February 4, 2020	March 17, 2020
Canceled due to COVID-19 National Cohort 8	April 28, 2020	June 9, 2020
National Cohort 9	September 15, 2020	October 27, 2020

COURSE STRUCTURE

MAX Preferred Customer Discount: $937.50 per participant (a 25% discount has been extended)

- All sessions start at 10:00 am PT / 1:00 pm ET.
- All sessions are 1 hour and 15 minutes.
- This is a highly interactive online course that is facilitator-led with active participant interaction.
- There are coaching sessions built into each session to complete the capstone assignments.
- Participants will demonstrate the course learning outcomes in each assignment they submit including during the final consultation.
- The facilitator will provide feedback on all assignments submitted as well as on the assignments that have been resubmitted to achieve the required learning outcomes for that specific session topic.
- The course facilitator will lead peer-to-peer workshopping opportunities during each session meeting to reinforce the course competencies.
- The CBEP course requires at least 2-to-3 hours per week for seven weeks from each cohort member, plus a final one-hour consultation with the course facilitator.
- Upon the successful completion of the course, the participant will have *earned* the professional designation "CBEP" (Certified Business Engagement Professional) and receive via mail a personalized Certification that also documents the Continuing Education Units (CEU) earned: 2.9 CEUs. IACET, Business U's accrediting agency (IACET) and the U.S. Department of Education define the CEU standard of measurement as: 1 CEU = 10 contact hours.
- Once participants earn the CBEP designation, they can use the designation in their signature

Certified
BUSINESS ENGAGEMENT PROFESSIONAL™
CBEP Designation

LEARNING OUTCOMES

Upon the successful completion of the Certified Business Engagement Professional course, the CBEP course participant will be able to:

- Self-identify transactional and transformational business engagement behaviors and outreach efforts.
- Understand the difference between transformational and transactional engagement strategies.
- Apply the fundamentals of developing trust and credibility with employers and partners by strategically increasing meaningful interactions and decreasing expectations.
- Understand the difference between delivering business services and implementing business engagement strategies.
- Understand the need to differentiate a "business" from an "employer."
- Apply relationship building principles to develop a transformational relationship with business and industry.
- Articulate the difference between a program feature and its associated benefit.
- Translate program features into benefits to create relevancy and value for business customers.
- Develop value propositions across all business-customer touchpoints to expand job seeker/student opportunities including work-based learning strategies.
- Apply a communication platform that includes key messaging and talking points, calls to action, and value propositions to engage businesses and community partners.
- Understand when to use clarifying versus probing questions during a consultation by applying a multi-layered communication approach.
- Apply demand-driven engagement strategies and tactics that are specific to a business audience.
- Learn to "drop" agendas and decrease expectations to meet the immediate needs of business.
- Expand reach and engage businesses as a customer or partner without duplicating efforts.
- Avoid transactional “asks” that fatigue the market and create duplicated efforts.
- Apply a consultative approach when engaging with business and industry.
- Understand the meaning of prospecting for new customers.
- Apply prospecting tools to open up opportunities for engagement.
- Develop six innovative and demand-driven “elevator speeches” focused on a business audience.
- Learn to monetize program/service offerings to create value as well as to use as a recovery tool.
- Overcoming and pre-empting objections with current and potential business customers.
- Gain the ability to move from a general discussion with employers to one that is specific to their immediate and future needs to develop their workforce.

- Understand the difference between a strategy and tactic.
- Apply business engagement goals, strategies, tactics and measurable objectives to achieve desired outcomes.
- Understand workforce development metrics that matter to an employer.
- Leverage an increased portfolio of partner (economic development, education, chamber, SBDC, etc.) services and business solutions to expand reach and build credibility within the community and regionally.
- Work with community and regional partners to become a solutions-driven resource that businesses value as a result of providing access and connections to solve business challenges.
- Align referral processes ("getting" & "giving") with regional partners and business services teams to expand outreach opportunities.
- Apply a standardized employer needs assessment to validate data for hiring and training needs.
- Gather and leverage data from needs assessments to provide business customers with market and sector insight.
- Leverage online professional profiles to engage business and industry.

CBEP COURSE TOOLKIT

A welcome toolkit will be mailed to the address provided on the participant's registration form.
The kit will contain the following items:

- Welcome letter from the facilitator
- Attendance policy
- Course outline
- Weekly plan: dates and session topics
- Weekly call-in details to attend the webinar sessions
- Advice from CBEP graduates to set expectations for the capstone assignments
- eUniversity login guide
- Business U document holder
- Business U stylus pen

National Cohort 9

Start Date: September 15, 2020
End Date: October 27, 2020
Start Time: 10:00 am PT / 1:00 pm ET

BUSINESS ENGAGEMENT OVERARCHING TOPICS & MEETING DATES

Week 1: Business Engagement Framework: September 15, 2020

- Business Engagement Approach: Demand-Driven and Market-Responsive
- Business Engagement Relationship Development
- Transactional and Transformational Business Engagement

Week 2: Expanding Business Engagement Opportunities: September 22, 2020

- Value Propositions (Features vs. Benefits)
- Demand-Driven Value Propositions Across All Business-Customer Touchpoints
- Workforce Metrics That Matter to Employers
- Strategic Business Engagement Outcomes (Goals-Strategies-Tactics-Measurable Objectives)

Week 3: Workforce Development Strategies: September 29, 2020

- Business Solutions Portfolio
- Business Cycle
- Resource Alignment and Leveraging
- Referral Process
- Needs Assessment
- Multi-layered Probing Question

Week 4: Engagement Strategies: One-to-One & One-to-Many: October 6, 2020

- Consultative Approach to Engagement
- 3rd Party Credibility
- Elevator Speeches
- Communication Platform & Approach Talk Track
- Segmenting B2C & B2B Outreach Efforts
- LinkedIn Strategies

Week 5: Prospecting – Overcoming Objections – Recovery Work: October 13, 2020

- Prospecting & Prospecting Tools
- Overcoming Objections
- Recovery Work

Week 6: Coaching Session #1 & Monetizing Business Services: October 20, 2020

- The coaching session is designed to assist the participants with finalizing their capstone business engagement assignments and to actively workshop challenges with outstanding assignments.
- Monetizing business services as a business engagement strategy to increase the awareness and perception of value for workforce development programs to the business community.

Week 7: Coaching Session #2 & Working with Banks: October 27, 2020

- This session is a continuation of coaching session #1
- Working with banks as a business engagement strategy

WEEK 8: Final Consultation

The final consultation is scheduled individually with each participant during Week 5.

BusinessU
Maximize Business Engagement®

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BUSINESS ENGAGEMENT PROFESSIONAL™
CBEP Designation

CBEP Registration Form

PAYMENT INSTRUCTIONS	
1. Payment Method: Checks only 2. Payable to: Business U, Inc. 3. Mail Payment to: Business U, Inc. 907 Westwood Blvd. #324 Los Angeles, CA 90024 4. Federal Tax ID: 47-3950747 (W-9 attached) 5. Payment must be received no later than the Cohort start date. 6. Space is limited. To reserve your seat, please email, mail or fax your registration form to Shayne Nelson. Please also contact Shayne if you need more information or have questions about the course. Email: Shayne@business-u.net or Fax: 310.693.5329	**CANCELLATION POLICY** We understand that circumstances may arise which may change your plans to attend the CBEP Course. We will gladly give you a full refund prior to the CBEP course start date. Should you have additional questions regarding canceling your registration, please contact Shayne Nelson at Shayne@business-u.net

Please place a mark below next to the Cohort you would like to attend

Cohort 7 Starts February 4, 2020	Cohort 8 Starts April 28, 2020	Cohort 9 Starts September 15, 2020

Participant Name	
Organization Name	
Job Title	
Email Address	
Telephone #	
Billing Address	
Please print or type your Mailing Address. This is where you will receive your CBEP Toolkit.	

Participant or Manager Signature:
Date:

Please place a mark below next to the Cohort you would like to attend		
Cohort 7 **Starts February 4, 2020**	**Cohort 8** **Starts April 28, 2020**	**Cohort 9** **Starts September 15, 2020**

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Participant or Manager Signature:
Date:

Form **W-9**
(Rev. October 2018)
Department of the Treasury
Internal Revenue Service

Request for Taxpayer Identification Number and Certification

▶ **Go to *www.irs.gov/FormW9* for instructions and the latest information.**

Give Form to the requester. Do not send to the IRS.

Print or type. See Specific Instructions on page 3.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.

Business U, Inc.

2 Business name/disregarded entity name, if different from above

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only **one** of the following seven boxes.

☐ Individual/sole proprietor or single-member LLC ☐ C Corporation ☑ S Corporation ☐ Partnership ☐ Trust/estate

☐ Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____

Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is **not** disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.

☐ Other (see instructions) ▶

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any) _____

Exemption from FATCA reporting code (if any) _____

(Applies to accounts maintained outside the U.S.)

5 Address (number, street, and apt. or suite no.) See instructions.

907 Westwood Blvd., #324

Requester's name and address (optional)

6 City, state, and ZIP code

Los Angeles, CA 90024

7 List account number(s) here (optional)

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number

			–			–				

or

Employer identification number

4	7	–	3	9	5	0	7	4	7

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here **Signature of U.S. person** ▶ _____ **Date** ▶ January 1, 2020

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to *www.irs.gov/FormW9*.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)
- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, *later.*