

## Certified Business Engagement Professional™

### CBEP Accredited Course

#### Program Outline – Session Topics – Meeting Dates – Learning Outcomes

The CBEP program is for business services supervisors/managers and employer-facing staff in workforce development and education. Earn the CBEP Certification by completing a seven-week, demand-driven business engagement online course to gain the necessary knowledge and skills to successfully engage business and industry. (Course work is required to earn the CBEP Certification). Business U is accredited by the International Association for Continuing Education and Training (IACET) and is authorized to issue the IACET CEU.

2021 National Cohort	Start Date	End Date
<b>National Cohort 11</b>	September 14, 2021	October 26, 2021

Facilitator: Christine Bosworth, Ed.D. [Christine@business-u.net](mailto:Christine@business-u.net)

Support Coordinator: Shayne Nelson, CBEP [Shayne@business-u.net](mailto:Shayne@business-u.net)

### CBEP COURSE STRUCTURE

- All sessions start at 10:00 am PT / 1:00 pm ET.
- All sessions are 1 hour and 30 minutes (total 90 minutes).
- This is a highly interactive online course that is facilitator-led with active participant interaction.
- There are coaching sessions built into each meeting to complete the CBEP assignments for certification.
- Participants will demonstrate the course learning outcomes in each assignment they submit including during the final consultation with their facilitator.
- 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 to reinforce the course competencies. Cohort participants can also request to have their assignments workshopped during and after each session to fully grasp the learning outcomes and to complete the CBEP assignments successfully.
- The CBEP course is 7 weeks and it requires at least 3 hours per week (this includes the weekly 90-minute meetings) from each cohort member and/or team, plus a final one-hour consultation with the course facilitator.
- Upon the successful completion of the course, the participant will have *earned* the Certified Business Engagement Professional™ Certification and the professional designation “CBEP” (Certified Business Engagement Professional™). The participants can use the “CBEP” designation in their signature.
- The participant’s personalized and accredited certification will be emailed to the email address on the participant’s registration form.
- The CBEP Certification will document the Continuing Education Units (CEU) earned: 2.1 CEUs. IACET, Business U’s accrediting agency ([IACET](http://iacet.org)) and the U.S. Department of Education define the CEU standard of measurement as: 1 CEU = 10 contact hours.

## CBEP COURSE TOOLKIT

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

- Welcome letter from the facilitator
- Attendance policy
- Learning Outcomes
- Course outline: session topics and meeting dates
- Description of assignments to earn the CBEP Certification
- Weekly call-in details to attend the webinar sessions - Zoom is the platform Business U uses to conduct the live and interactive sessions between the facilitator and participants.
- Advice from CBEP course graduates to help set expectations to successfully earn the certification.
- Business U document holder
- Login guide to Business U's learning management system called the "eUniversity" (eU). The eU's Collaborative Forum is where the Cohort participants submit their CBEP assignments and interact with the facilitator after class to receive feedback on each submission and re-submission to achieve the learning outcomes. The eU is also where the Cohort can also interact with other Cohort participants for peer-to-peer learning and to share business engagement challenges and best/promising practices.



907 Westwood Blvd., Suite 324 | Los Angeles, CA 90024 | Tel: 310.405.1066

Email: [info@Business-u.net](mailto:info@Business-u.net) | Website: [www.business-u.net](http://www.business-u.net)

# Program Outline – Session Topics – Meeting Dates – Learning Outcomes

## CBEP Cohort 11

Start Date: September 14, 2021

End Date: October 26, 2021

Time: 10:00 am PT / 1:00 pm ET (each weekly session is 90 minutes)

### Week 1: Business Engagement Framework – September 14, 2021

- 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."
- Learn to "drop" agendas and decrease expectations to meet the immediate needs of business.
- Apply relationship building principles to develop a transformational relationship with business and industry.
- Understand the difference between supply and demand target audiences to align engagement strategies, tactics and measurable objectives.

### Week 2: Expanding Business Engagement Opportunities – September 21, 2021

- 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 external business-customer touch-points to expand job seeker opportunities including work-based learning strategies.
- Apply demand-driven engagement strategies and tactics that are specific to a business audience.
- Understand the differences between a strategy and tactic.
- Apply measurable objectives to engagement strategies and tactics.
- Implement demand-driven strategies, tactics and measurable objectives to achieve goals.
- Understand workforce measures that matter to an employer.

### Week 3: Workforce Development Strategies – September 28, 2021

- Expand reach and engage businesses as a customer or partner without duplicating efforts.
- Avoid transactional “asks” that fatigue the market and create duplicated efforts.
- 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 employers’ value as a result of providing access and connections to solve business challenges.
- Contribute to a solutions portfolio to help businesses solve their most immediate challenges even if those solutions are services you do not provide.

- Gain the ability to move from a general discussion with employers to one that is specific to their immediate and future workforce development needs.
- Apply a standardized needs assessment to validate labor market data for hiring and training needs.
- Gather and leverage data from needs assessments to provide business customers with market and sector insight.
- Align referral processes (“getting” & “giving”) with regional partners and business services teams to expand outreach opportunities.
- Understand when to use clarifying versus probing questions during a consultation by applying a multi-layered communication approach.

#### **Week 4: Engagement Strategies: One-to-One & One-to-Many – October 5, 2021**

- Apply a communication platform that includes key messaging and talking points, calls to action, and value propositions to engage businesses and community partners.
- Gain confidence as a workforce development professional by adopting a consultative approach when engaging with business and industry.
- Develop six innovative and demand-driven speeches/pitches focused on a business audience.
- Understand the value of gathering and promoting 3<sup>rd</sup> party testimonials from current business customers.
- Leverage online professional profiles to engage business and industry.

#### **Week 5: Prospecting for New Business Customers – October 12, 2021**

- Understand the meaning of prospecting for new customers.
- Understand that prospecting is the art of opening a new relationship.
- Strategically segment customer and prospecting lists.
- Apply prospecting tools to open up opportunities for engagement.
- Gain awareness of two overarching reasons that cause poor prospecting results.
- Gain awareness of two overarching elements to focus on when prospecting.
- Learn how to put into practice prospecting research.
- Apply three compelling prospecting questions to develop calls-to-action.

#### **Week 6: Overcoming Objections & Recovery Work – October 19, 2021**

- Learn that customer objections can be an opportunity to increase interaction.
- Apply value propositions to overcome objections.
- Know that objecting to something "new" is a normal human response.
- Overcome objections by classifying them into four categories: Trust - Quality - ROI - Stall.
- Apply the Feel–Felt–Found formula.
- Implement operational processes to overcome objections.
- Preempt objections by using an objection management document.
- Differentiate between overcoming objections and recovery work.
- Use the concept of monetizing service offerings to use as a recovery tool.
- Overcome objections by articulating and demonstrating intangible benefits.

## Week 7: Monetizing Value-Based Business Services – October 26, 2021

- Show instead of “tell” employers the benefits of publicly-funded business services.
- Learn what it means to monetize value-based business services.
- Understand the psychological effect of dangling “free” as a value.
- Differentiate between monetized and fee-based business services.
- Focus on the outcome to highlight delivering benefits attached to business services.
- Learn what the overarching differences are between: Price – Cost – Worth – Value.
- Understand the business perspective of “value calculation.”
- Understand that value is “relative” and differs from person to person.
- Learn the “mother-tongue” of business—Return on Investment (ROI).
- Calculate ROI using tangible and/or intangible “value” for a business customer.
- Calculate Social Return on Investment (SROI) to demonstrate economic impact to funders.
- Operationalize a monetized and value-based business service strategy
- Apply operational process steps to develop a monetized and value-based business engagement strategy.

### COST TO ATTEND THE CBEP COURSE – COHORT 11

**NOTE:** if you are a current or previous Business U professional development or B2B Engage® CRM customer, an additional 10% preferred customer discount will be extended.

Participants	Discount	Cost Per Participant
<p>Business U is offering CBEP registrations for Cohort 11 that are associated with MAX and use the Business U/MAX registration form to reserve their seat, a 25% discount.</p> <p>The cost per participant is \$937.50 as oppose to \$1,250 per participant, a \$312.50 savings.</p>		



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# Request for Taxpayer Identification Number and Certification

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

▶ Go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9) for instructions and the latest information.

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

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

C Corporation

S Corporation

Partnership

Trust/estate

Other (see instructions) ▶ \_\_\_\_\_

**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.

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**

6 City, state, and ZIP code  
**Los Angeles, CA 90024**

7 List account number(s) here (optional)

Requester's name and address (optional)

Print or type.  
 See Specific Instructions on page 3.

## 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**

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OR

**Employer identification number**

4	7	-	3	9	5	0	7	4	7
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## Part II Certification

Under penalties of perjury, I certify that:

- 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
- 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
- I am a U.S. citizen or other U.S. person (defined below); and
- 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](http://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.*