

TX VRC Resource Tools

3. Building a Business Planning Team

Most, if not all, business owners require a team for support. It is infrequent that someone manages all aspects of their business. Many business owners work with business consultants, take classes, consult with business resources and depend on friends and family for help. People experiencing disability will also require a team for support to help with business development, support business launch and early operations, provide long-term support, or to provide specialized services such as benefits and work incentive counseling. This tool is to help you think through the supports that the VR customer may access during different stages of business development.

“Many hands make light work!”

The attached tool provides a guide for thinking through what support might be needed at various stages of the self-employment process. Review this with your customer to identify potential resources, including:

- **Natural Supports** – Family members, friends, others who are willing to help without requiring payment.
- **Community Supports** – Agencies or programs designed to help prospective business owners with self-employment (Vocational Rehabilitation staff, provider agency CBTAC's, Community Work Incentive Coordinators, SBA Partners, including the Small Business Development Center, the Women's Business Centers and SCORE).
- **Other Supports** – This might include someone with expertise in the industry or others with lived business experience. It might also be someone paid (through the business) to provide specific services such as bookkeeping, tax prep, legal advice or website development and maintenance.

It is encouraged to bring those people together to form a team. Teams might meet on a regular schedule (i.e., monthly meeting) in person or through Zoom or other platforms. If a regular date is set up in advance (e.g., every third Wednesday at 3:00) you will save time in coordinating meetings.

Some team members may not be needed at every stage of the self-employment process. For example, it may be important to have a Community Work Incentive Coordinator (CWIC) participate with the team early in the process to understand how self-employment will

impact disability benefits and identify work incentives that might apply. CWICs may also be needed after business launch, when the business starts producing income that the person needs to report. They might not be needed during the business planning phase but should be updated on the prospective business owner's progress and current activities. This keeps team members in the loop and provides an opportunity for them to give input as needed.

Use the tool below to identify potential Business Team members. The team will grow and evolve over time, so it may not be possible to identify all potential team members at this point. You may identify team members who can help with initial steps, but also re-visit this as needed!

Building a Business Planning Team

Who can help you think through this option and decide if self-employment makes sense for you?

- **Natural Supports** – Family and Friends (non-paid)
- **Community Supports** – Agencies or programs designed to help prospective business owners and/or people with disabilities.
- **Other Supports** – People with industry expertise, contracted workers or specialists.

<p>CONSIDERING SELF-EMPLOYMENT</p> <ul style="list-style-type: none"> • Thinking through conditions for success • Benefits and Work Incentive Planning Assistance 	<p>[] Natural Supports: _____</p> <p>[] Community Supports: _____</p> <p>[] Other Supports: _____</p>
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Once you decide to move forward with self-employment, you'll need to complete the business planning steps. Who can help you complete those steps:

<p>BUSINESS PLANNING</p> <ul style="list-style-type: none"> • Business Concept Development • Business Feasibility • Business Plan Development 	<p>[] Natural Supports: _____</p> <p>[] Community Supports: _____</p> <p>[] Other Supports: _____</p>
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Once you have your business plan done, think through who will help you launch and maintain the business:

<p>PRE-LAUNCH</p> <ul style="list-style-type: none"> • Securing funding (PASS, etc.) • Securing space, licenses 	<p>[] Natural Supports: _____</p> <p>[] Community Supports: _____</p>
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<ul style="list-style-type: none"> • Registering business name • Registering Company • Setting up bookkeeping system • Obtaining initial equipment and supplies • Marketing 	<input type="checkbox"/> Other Supports: _____
<p>LAUNCH AND EARLY BUSINESS OPERATIONS</p> <ul style="list-style-type: none"> • Grand opening • First day/week of operation • Job Coaching • Bookkeeping • Marketing 	<input type="checkbox"/> Natural Supports: _____ <input type="checkbox"/> Community Supports: _____ <input type="checkbox"/> Other Supports: _____
<p>LONG-TERM SUPPORT</p> <ul style="list-style-type: none"> • Benefits and Work Incentive Planning Assistance • Job Coaching • Business Stability and Growth 	<input type="checkbox"/> Natural Supports: _____ <input type="checkbox"/> Community Supports: _____ <input type="checkbox"/> Other Supports: _____