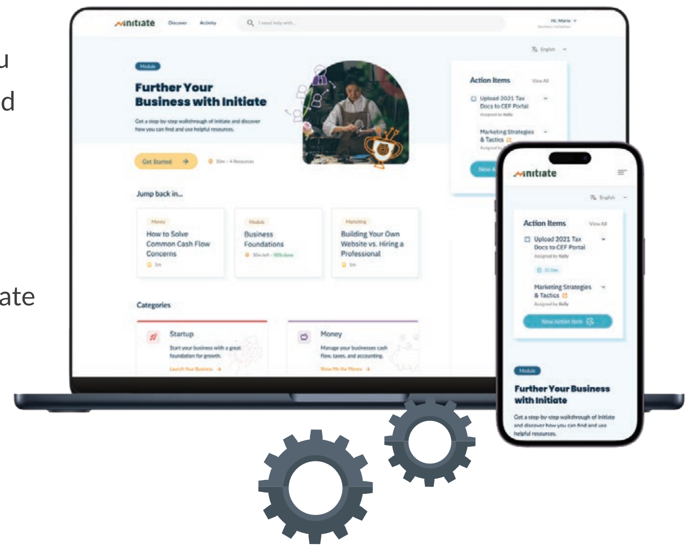
Subscriber Welcome Guide

Welcome to the *Initiate* community.

We're excited that you've chosen to work with us to support your borrowers' technical assistance needs. It's our priority to ensure you have an efficient and useful experience with our *Initiate* platform and team from day one, so we've compiled this packet of resources to provide a framework and clear path for success.



Inside this packet, you'll find:

- An introduction to our team and your points of contact for Initiate
- What to expect during onboarding
- An agenda and timeline for our onboarding time together
- A brief history of Northern Initiatives, the Initiate platform and Blended Learning model
- Best practices
- Definitions and FAQs

Meet Your Northern Initiatives Support Team

Chris Wendel
Initiate Program Manager

cwendel@northerninitiatives.org
C: 231.409.7889
Initiate Program Manager

Contact Chris for general Initiate questions including onboarding, training, and contracts.

Stacy Zielinski
Initiate Director

szielinski@northerninitiatives.org
C: 414.688.1003
Initiate Director

Contact Stacy with ideas to further implement Initiate with your technical assistance program.

Jessa Armstrong
Initiate Associate Product Manager

jarmstrong@northerninitiatives.org
C: 734.773.2295
Initiate Associate Program Manager

Contact Jessa with questions related to platform technology, utilization, and content.
Fluent in English & Spanish.

What to EXPECT: Onboarding Initiate

Below is an overview of what we'll be covering in onboarding.

3-5 weeks total timeframe for each session, 60 minutes each

Team Lead for Technical Assistance Only:

- Overview of organizational admin function
- Tour of administrative dashboard functionality and platform reporting
- Organizational customization and content
- Defining Initiate Usage Metrics (progress of assigning tasks, learning modules, resources and custom content)

Technical Assistance Team:

- Discover platform content and functionality
- Review case study application of Initiate
- Discuss best practices related to blended learning and technical assistance programming
- Review Initiate subscriber guides and resources

Agenda and Schedule

Meeting and Preparation	Participants
Initiate Set-Up Call **PREPARATION FOR CALL:** **Team Lead: Complete Subscriber Intake Questionnaire** **Team Lead: Accept the invitation for Initiate and create your user account.**	Subscriber's Initiate Lead
Onboarding Call #1: Orientation and Platform Navigation **PREPARATION FOR CALL:** **Team Lead: Invite TA Team to platform** **All team: Review Welcome Guide** **Bring outstanding questions to the session**	Subscriber's entire TA team ** May include other subscribed organizations*
Onboarding Call #2: Integrating Initiate into Org's TA Program **PREPARATION FOR CALL:** **All team: Identify one resource in the Initiate that you feel will be most beneficial to your borrowers.** **Review Subscriber Operating Manual** **Bring outstanding questions to the session**	Subscriber's entire TA team ** May include other subscribed organizations*
Onboarding #3: Case study and Integration cont'd **PREPARATION FOR CALL:** **All team: Review Subscriber Operating Manual** **Bring outstanding questions to the session**	Subscriber's entire TA team ** May include other subscribed organizations*
Wrap-Up Call **PREPARATION FOR CALL:** **Lead: Identify and be ready to discuss:** • **Remaining questions, concerns, challenges, etc.** • **Customization and Content** • **Potential Usage Metrics**	Subscriber's Initiate Lead and if applicable, Org's "Admin"

Northern Initiatives and Technical Assistance (TA)

Since 1994, our mission at Northern Initiatives has been to provide "money and know-how" to Michigan small business owners to help their communities thrive. To us, a small business loan isn't just a loan: it represents a chance at building community wealth, improving quality of life, and creating positive, sustainable change.

Access to capital is only part of the equation. Business owners often need support in addition to funding. That is why Northern Initiatives provides coaching, resources, and tools to help our customers achieve their business goals.

Over the past 30 years, we have identified 3 major trends for supporting businesses:

1. There are differences in each business as well as differences in how business owners learn.
2. Collaborative learning is effective and impactful to business owners.
3. Customization is key to growing business acumen.

This understanding led Northern Initiatives to develop **Initiate**. Initiate uses *Human-Centered Design* and *Blended Learning Principles* to deliver meaningful business support services.

What is Blended Learning?

Blended Learning is an educational practice that takes traditional in person instruction and pairs it with online resources and interactions. In the case of Initiate, those resources are targeted at fostering growth in business skills, confidence in decision making and efficiencies for business owners.

Individual Coaching / Guided Group Training + **Utilizing Initiate Resources as Recommended** = **Standardization Efficiency Growth Understanding**

Initiate creates a systematic approach to technical assistance (TA) that will increase consistency and effectiveness of TA support. This leads to greater organizational impact through the sustainability and growth of the business owners you serve.

Initiate's proven online tools position your organization to engage more customers with technical assistance. It's easy to use a format standardizing your TA approach to focus on areas that matter most to business owners:

Startup, Money, Marketing, and Management.

With Initiate, your organization's staff and the business owners they serve gain immediate online access to hundreds of interactive calculators, templates, videos, and small business guides in English and Spanish.

Initiate is used for:

- ✓ Capacity Building: Support your organization's ability to improve and increase business owner outreach, engagement and success
- ✓ Relationship Building: Blended learning and the use of targeted resources help build a trusting relationship with your business owners
- ✓ Creating TA Systems: The resources ensure your business owners receive a consistent TA experience
- ✓ Professional Development: TA Staff can also build their business knowledge via Iniaite resources
- ✓ Risk Mitigation: Effective TA directly supports your organization's portfolio risk
- ✓ Reporting: Monitor, track and support business owners' activity and learning
- ✓ Funder Engagement: Impact driven TA supports your organization's efforts to secure their monetary support

What are Best Practices in Implementing an Effective Blended Learning Model?

Make "Learners" the focus of the learning

Important: In your case, the learner is the entrepreneur/business owner/borrower. To create the learner driven experience, it is essential to build relationships between the TA Advisor and business owners as well as the learners with each other when facilitating group TA sessions.

Set clear expectations on goals and objectives

This is always important but even more so when the transition to a blended learning TA model is new to the learner/s. They need to understand the expectations of your organization's TA Program and it's use of technology. Overcommunication is ALWAYS better.

Provide specific collaboration tools and opportunities

Review and highlight features of tools that are useful to the learners. Guide them explicitly in the use of the tools. HINT: Use the Business Assessment tool to understand what topics matter to them

Be deliberate in linking face-to-face and virtual learning

Pair in person discussions with follow-up online resources to reinforce learning or vice versa. When working with small groups, follow up sessions with small group discussions. Virtually, this can be done using break-out rooms that video conferencing platforms offer.

Initiate Definitions

Advisor – Any person or consultant that provides technical assistance, training, and guides Learners in using Initiate

Initiate – Online small business technical assistance platform created and managed by Northern Initiatives - It has hundreds of resources related to Money, Management, Marketing and Start-Ups.

Initiate Relationship Manager – Northern Initiatives staff that is responsible for all onboarding of subscribers to the platform (currently Chris Wendel)

Initiate "Train the Trainer" Sessions - Bimonthly calls in which the Initiate Program Manager will lead conversations around key topics and best practices related to Initiate

Learner – Any entrepreneur or business owner working with an Advisor or CDFI to get lending and business coaching

Subscriber – Organization that has an active contract with Northern Initiatives to utilize the Initiate platform

Subscriber Admin/Lead – Subscriber staff person that is responsible for overseeing the Org.'s TA Team and integrating Initiate into the TA program. They manage users, customization, and/or reporting, etc.

Technical Assistance (TA) – Business support services provided to entrepreneurs. This primarily happens after they close a loan with a lender but can also happen independently or in preparation for a loan.

FAQs

Q: How do we access Initiate?
A: The NI Initiate Team will create a subscriber account for your TA Team. Subscriber Admins for each organization can invite Advisors to Initiate. Once Advisors are familiar with the platform, they can invite Learners.

Q: How often can our TA Team access Initiate?
A: Initiate is accessible 24/7 via desktop or mobile.

Q: How do we customize Initiate to our organization's branding?
A: You will have the ability to add your logo and advisors. As you invite learners they will be tied to an advisor. Learners are then able to see who to contact when they have questions.

Q: What if we need to find a specific type of resource?
A: You can:

- Type in a specific description in the search box at the top of the Discover page,
- Scroll down to the categories and search that way,
- Click on "View All Resources" and use the filters, or
- Search by resource type at the bottom of the page.

Q: What if a Learner starts using a resource but needs to revisit it later?
A: Recently used resources show up on the Learner's homepage under the heading "Jump back in…", located midway down the page.

Q: Can we access the Initiate platform from smart phones?
A: Yes, it is fully functional on mobile devices.

Q: Can we add our own content to the platform?
A: Yes. Depending on your organization's Subscription, your Subscriber Admin may upload specific content for only your Learners (business owners).

Q: Do business owners need a computer to access resources on Initiate?
A: No, if there is a resource that you'd like to use with a borrower that does not have regular access to a computer or phone you may print resources for them using the CTRL P function on your keyboard.

Q: What is the best way to connect with other Initiate Subscribers or NI staff?
A: We host "Train the Trainer" webinars every other month. These webinars provide a great opportunity for Advisors to learn about engaging Learners, specific application of platform resources and connecting with Advisor peers that are also using Initiate.

Q: What if I am having technological issues or want to submit an idea for a resource not on the platform?
A: You can share all feedback and request tech support through the Initiate Knowledge Hub under Customer Support.