

Maximizing Platform Success

Practical ways to integrate Initiate into your organization's everyday work so clients get the most value from day one.

BUILD ORGANIZATIONAL SUPPORT

- Make Initiate part of your organization's standard client journey.
- Train all frontline staff on what it is, how it's used and benefits to clients.
- Share success metrics regularly to reinforce its value.
- Incorporate Initiate usage into organizational performance measures where appropriate.

START STRONG

- Register clients during the first meeting instead of asking them to sign up later.
- Include Initiate in your onboarding checklist for every new client.
- Send a welcome email immediately after enrollment with clear next steps.
- Set the expectation that Initiate is part of your coaching process, not an optional resource.
- Communicate the value of Initiate early and often. An example of a clear concise tagline that you can use: *"Initiate gives you practical tools and guidance to help you make decisions that positively impact your business."*

FOCUS ON BENEFIT TO BUSINESS

- Saving time with templates already created
- Making better business decisions after reviewing content
- Building confidence because his/her knowledge is growing
- Preparing for financing by learning what to expect and prepare
- Solving current business challenges with the content
- Learning between coaching sessions that help guide conversations and support problem solving

INCREASE BUSINESS MOTIVATION

- Recommend only one or two resources at a time
- Explain how completing a resources/module will help solve a current business problem they are experiencing
- Share **success stories** from other entrepreneurs.
- Offer incentives when possible (i.e. eligibility for microgrants or matching grants after completing key modules).
- Emphasize how little time resources take and that clients can access resources at their convenience from their phone or computer.

LEVERAGE MARKETING AND COMMUNICATION

- Mention Initiate in your Org's newsletters.
- Feature a "Resource of the Month."
- Include Initiate in workshop follow-up emails.
- Promote the platform through social media and email campaigns.
- Add Initiate information to loan closing packets or business support materials.
- Add the platform link to email signatures and appointment confirmation emails as a visual reminder.

VISIT KNOWLEDGE BASE FOR TOOLS AND GUIDANCE

