



<p>November 2013</p>	<p>The Self-Employment Customer Tracking Guide</p>
<p>Other VR Counselor Resources</p>	<p><i>Facilitating VR Counselor Success One Process at a Time</i></p>
<p>SE Resources accessible through www.BuzVR.org:</p> <ul style="list-style-type: none"> • Business Advocacy • Business Counseling • Business Funding • Business Incubators • Business Marketing • Business Real Estate • Business Start-Up • Business Statistics • Business Training • Disadvantaged Business • Environmental Help • Government Contracts • International Business, Import/Export Help • Regulatory Help • Women in Business • Workforce Development 	<p><i>Hot Off The Press</i> - in every Vocational Rehabilitation office there are now supplies of a new tool, the VR Customer Tracking Documentation Workbook.</p> <p>The purpose of the workbook is to provide you with all of the required documentation for a Tier 1 Self-Employment proposal in one convenient, staple-bound booklet. As new cases arise where a VR Customer expresses an interest in pursuing self-employment, this book may be added to their case file and used to facilitate the self-employment development process going forward.</p> <p>Listed below are each of the components included in the Workbook their intended function and value:</p> <ol style="list-style-type: none"> 1. VR SE Process Flow Chart: A 1-page view of the total VR SE process 2. VR SE Customer Contact Log: A platform for noting the date, time and subject of SE meetings over time 3. SE Summary of Steps and Forms: A descriptive overview of each of the SE steps and the corresponding form(s) to be completed as part of that step 4. SE Tier 1 Business Proposal Requirements: The list of the 10 components that a VR Customer will provide as a result of engaging in the SE process 5. SE Project Tracking Agreement: A detailed flow chart of the SE development activities that a VR Customer and VR Counselor will progress through, date and sign off on as completed 6. Customer Profile Assessment (Form 1 of 3): The first of 3 forms that a VR Counselor will submit to the VR Regional Leader for feedback and sign off as the VR Customer responds to SE assistance services provided 7. Business Concept Assessment (Form 2 of 3): The second of 3 forms that a VR Counselor will submit to the VR Regional Leader for feedback and sign off as the VR Customer responds to SE assistance services provided 8. Business Proposal Assessment: (Form 3 of 3): The final form that a VR Counselor will provide to the Knowledge Institute along with all SE Tier 1 Business Proposal Components, to complete, which is then submitted to the VR Regional Leader for feedback and sign off. 9. Bookkeeping Collaboration Agreement and Tracking Form: A 2-part document that captures and validates who will be providing the business with bookkeeping services going forward and what will be monitored over the 6 months following venture launch/funding to assess progress 10. Business Readiness Checklist: A list of tasks that further support that the VR Customer has addressed what needs to be addressed to launch the venture and support progress going forward. <p>Your input and your tools to support success for you and your clients!</p>
<p>Participating in the 5 Steps to Self-Employment</p>	
<ul style="list-style-type: none"> • 5 Step Program Overview • Step 1, Self-Assessment • Step 2, Business Idea • Step 3, Cost & Income Forecasting • Step 4, Business Proposal • Step 5, Monitoring Progress 	

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