

# WIN MORE! Learn to Approach & Convert MORE Profitable Contracting Opportunities

## BONUS: ACCESS TO CAPITAL!



GOVERNOR'S  
**MINORITY & SMALL BUSINESS OUTREACH SUMMIT**

**NOVEMBER 19, 2024**

8:00AM - 5:00PM

**HILTON INNER HARBOR**

401 W. PRATT STREET, BALTIMORE, MD 21201



**Think about...Write down...Share:**

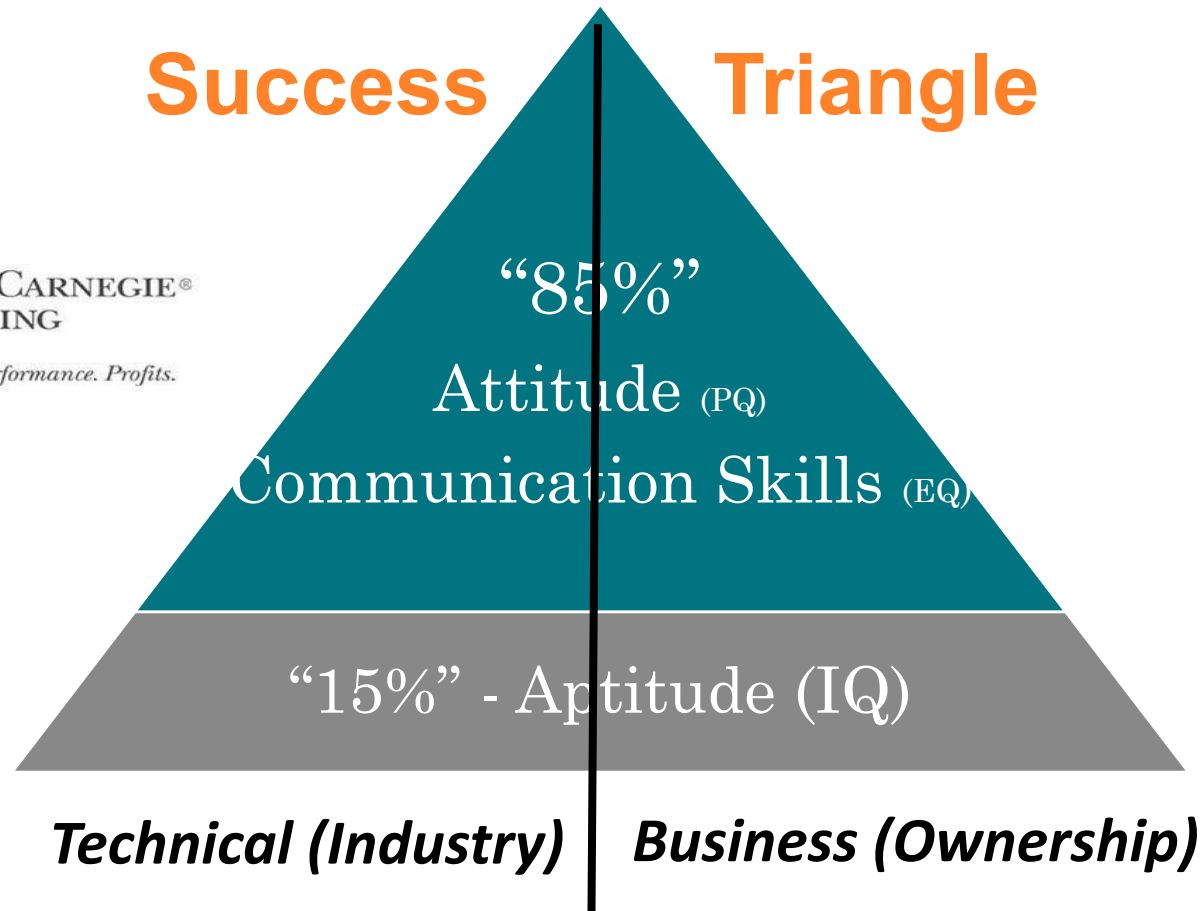
**What is your definition of “success?”**

# Success Triangle



DALE CARNEGIE®  
TRAINING

*People. Performance. Profits.*

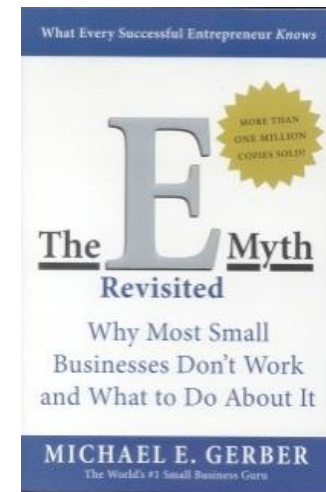


Source: Carnegie Foundation & Studied by Harvard & Stanford

## Incredible Revelation

***That Fatal Assumption: If you understand the technical work of a business, you understand a business that does that technical work...***

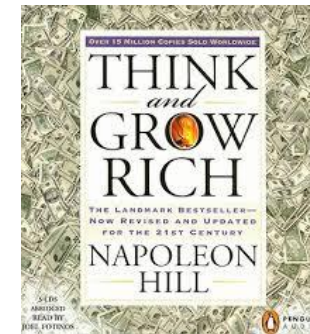
***The technical work of a business and a business that does that technical work are two totally different things!***



***...ultimately only one reason to create a business of your own, and that is to sell it!***

## Becoming Rich is Simple...

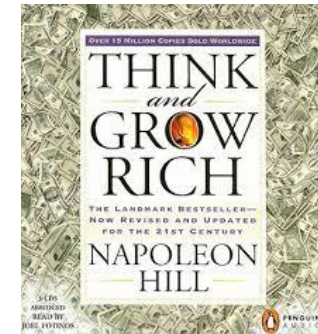
1. Follow those Spending Money
2. Solve Known Problem Better, Faster, Cheaper
3. Communicate Their Way, Not Yours



...It's Just Hard Work

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...It's Just Hard Work



## Strategic Business Growth to Win More! (Part 1) Create Systemized Plan to Earn More (61% MORE MONEY Yearly)



### Class #1: Look Beyond the Crises & Open D.O.O.R.S to Make Money - RECORDING

#### PRESENTATION FOR CLASS 1 WORKSHEETS 1 & 2 in Word

##### RESOURCES MENTIONED IN CLASS 1:

- [Apollo 13 Movie CLIP - Square Peg in a Round Hole](#)
- [Video: The E-Myth Revisited by Michael E Gerber | Animated Book Summary](#)
- [Patch Adams Movie CLIP-How Many Finger Do You See](#)
- [Earl Nightingale Reveals The Secrets In Think & Grow Rich](#)
- [Everest: Creating Greatness](#)

##### ARTICLES FOR CLASS 1: [CEO Accelerator - Articles for Worksheets 1 & 2](#)

##### ADDITIONAL RESOURCES FOR CLASS 1:

- [E-Myth - Book Summary](#)
- [E-Myth - Entire Book](#)
- [Video: Dennis Kimbro and Daniel Ally on Think and Grow Rich](#)
- [Video: Dennis Kimbro - Think and Grow Rich - A Black Choice](#)
- [Video: The Science Of Achievement \(Law Of Attraction\)](#)
- [Video: Think and Grow Rich for Women Summary](#)
- [Think And Grow Rich - Full Audio Book](#)
- [Think and Grow Rich - Summary Animated](#)
- [Zia Ziajar - Evaluate Where You Are](#)
- [Zia Ziajar - Goal Setting](#)

### Class #2: Increase Profits 61% Year Over Year (AFTER "NEW" BASE YEAR) - RECORDING (45 Minutes) Additional Videos Totaling 15 Minutes:

- [Video: Job to be Done](#)
- [Video: 5 Ways to Massive Profits with Brad Sugars](#)

#### PRESENTATION FOR CLASS 2 WORKSHEETS 3-9 & 12 in Word WORKSHEETS 10 & 11 PDF

##### RESOURCES MENTIONED IN CLASS 2:

- [Video: Clay Christensen: The "Job" of a Milkshake](#)
- [Video: 5 Financial Building Blocks](#) NOTE: Velocity is the Showed Last in the Video

##### ARTICLES FOR CLASS 2: [CEO Accelerator - Articles for Worksheets 3-9 & 12](#)

##### ADDITIONAL RESOURCES FOR CLASS 2:

- [Guide to Selling a Your Small Business - Full Book](#)

### Class #3: Strategic Execution: Getting the MOST Profitable Things Done - RECORDING (30 Minutes) Additional Videos Totaling 30 Minutes:

- [Brief Video Overview of 4 Disciplines of Execution](#)
- [Video Summary of the Book "4 Disciplines of Execution"](#)
- [Video of Discipline 4: WIG Meeting](#)

#### PRESENTATION FOR CLASS 3 WORKSHEET 5 - Drive 5 in Excel

##### RESOURCES MENTIONED IN CLASS 3:

- [Summary of the Book "4 Disciplines of Execution"](#)
- [Entire Section 1 of Book "4 Disciplines of Execution"](#)

##### ADDITIONAL RESOURCES FOR CLASS 3:

- [Video Overview for "The Effective Executive" by Peter Drucker](#)
- ["The Effective Executive" - Entire Book](#)

### Class #4: Your Activities - One-Page Plan to Win More: Time & Money - RECORDING

#### PRESENTATION FOR CLASS 4 WORKSHEETS 13-15 and 17 PDF WORKSHEET 13 - Process Improvement in Excel WORKSHEETS 14-18 - Growth System in Excel WORKSHEET 19 - Loan Summary 2 Pages in Word

##### RESOURCES MENTIONED IN CLASS 4:

- [Private Equity Recapitalizations: Selling Your Business Twice](#)

### Class #5: Leverage Resources: Maximize Profits in a Changing Economy - RECORDING

(2/17/22 Webinar with BWI/MAA)

#### PRESENTATION FROM 2/17/22 WEBINAR WITH BWI/MAA

##### ADDITIONAL RESOURCES FOR CLASS 5:

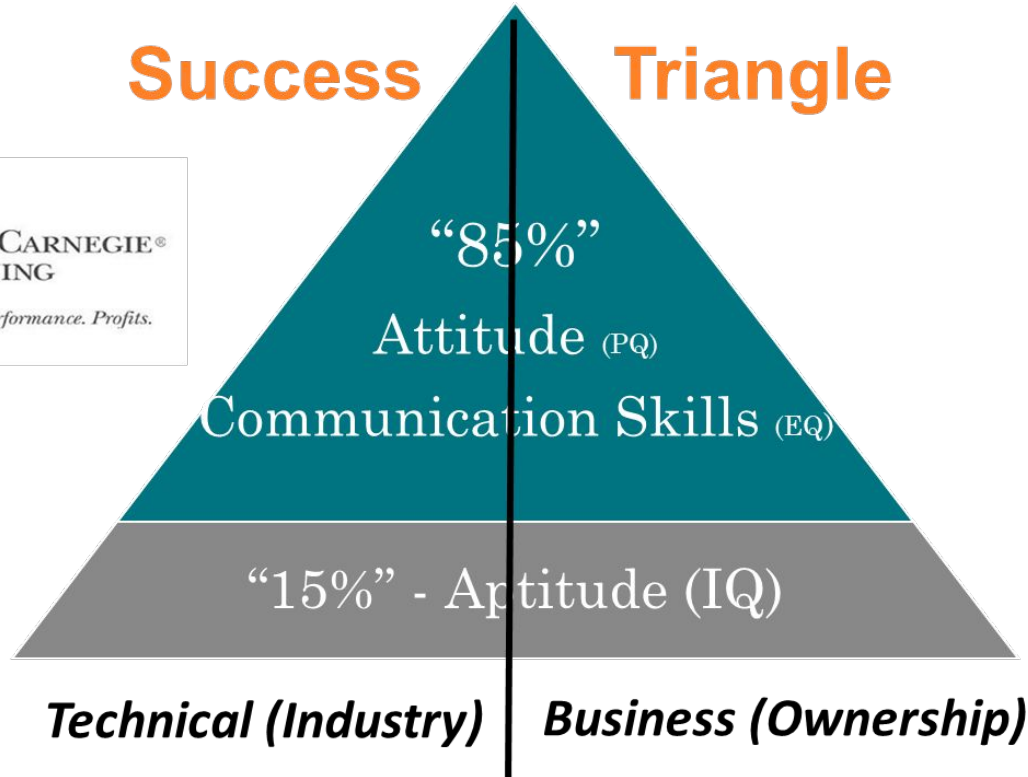
- <https://www.khanacademy.org/economics-finance-domain/ap-macroeconomics/basic-economics-concepts-macro/introduction-to-the-economic-way-of-thinking-macro/a/lesson-summary-opportunity-cost-and-the-production-possibilities-curve>
- <https://www.youtube.com/watch?v=1U6d5to1-4>
- <https://myipnet.it.com/news-center/Pages/Barracuda-webinar.aspx>
- <https://www.oaktreecapital.com/>
- <https://www.berkshirehathaway.com/>
- <https://www.youtube.com/watch?v=83XUJpQ2Y38> (Principals for Success)
- <https://am.jpmorgan.com/us/en/asset-management/gtm/adv/insights/guide-to-the-markets>
- <https://www.marketwatch.com/>
- <https://www.citic.com/>

[www.marylandsbdc.org/accelerator](http://www.marylandsbdc.org/accelerator)

*“It’s not just **what you know**, it’s also  
\_\_\_\_\_ you know.”*



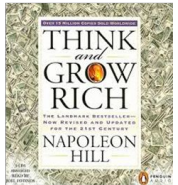
## Success Triangle



Source: Carnegie Foundation & Studied by Harvard & Stanford

Becoming Rich is Simple...

1. Follow those Spending Money
2. Solve Known Problem Better, Faster, Cheaper
3. Communicate Their Way, Not Yours



...It's Just Hard Work



***“It’s not just what you know, it’s also  
who you know.”***



***“What is the difference between  
making contacts and having  
contracts?”***

***R = Relationship”***



**Activity**

## Networking

The process of making connections with individuals, organizations, and institutions within a network.



**vs.**

***“The opportunity cost of networking is lost social capital.”***

*-Edward DeJesus*

## Social Capital Building

The consistent act of building, measuring and maintaining valuable relationships with a select group of network members with the goal of mutual economic and social wellbeing.

**Outcome**



# *“Social Capital*

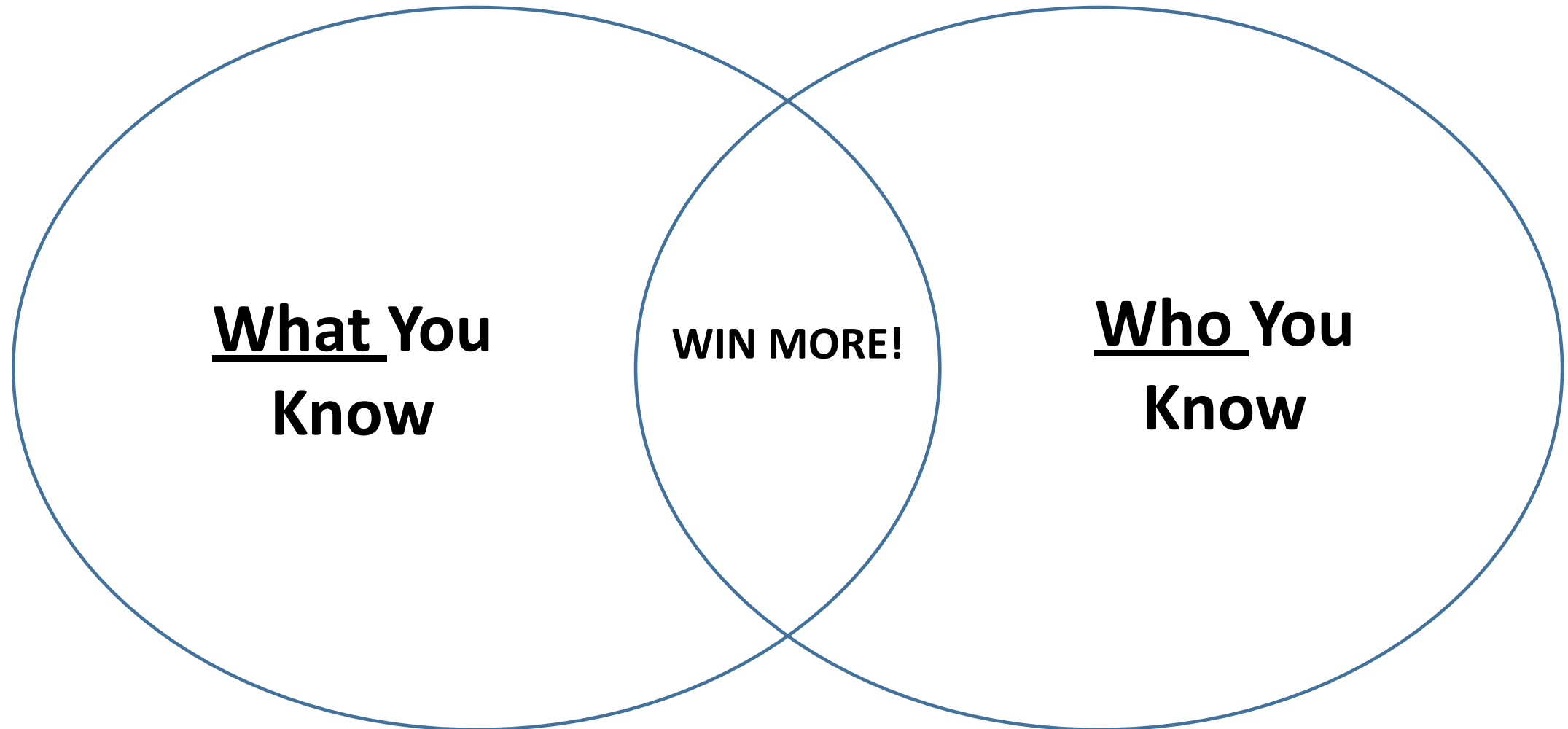
*Social = Building Relationships*

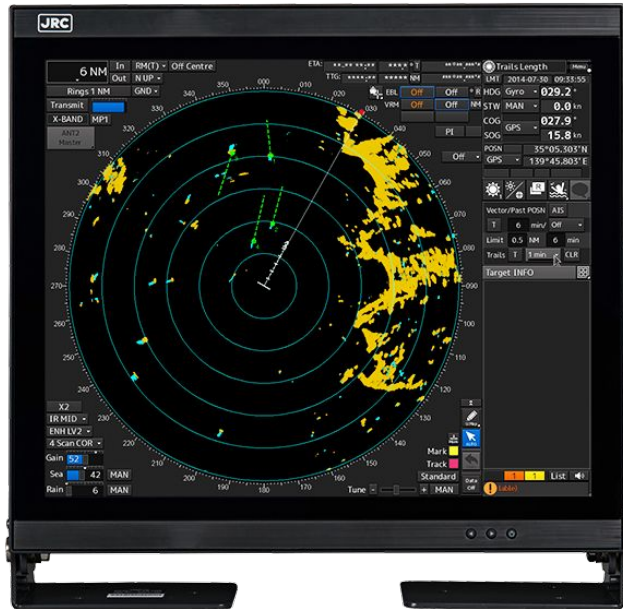
*Capital = Money*

*Social Capital is Building  
Relationships for Money*

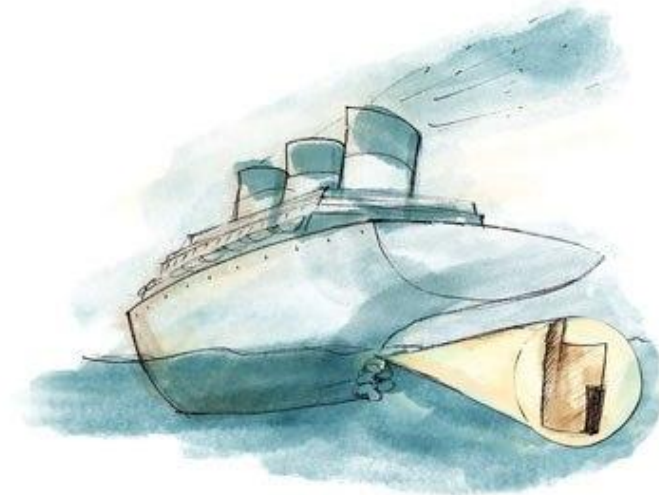


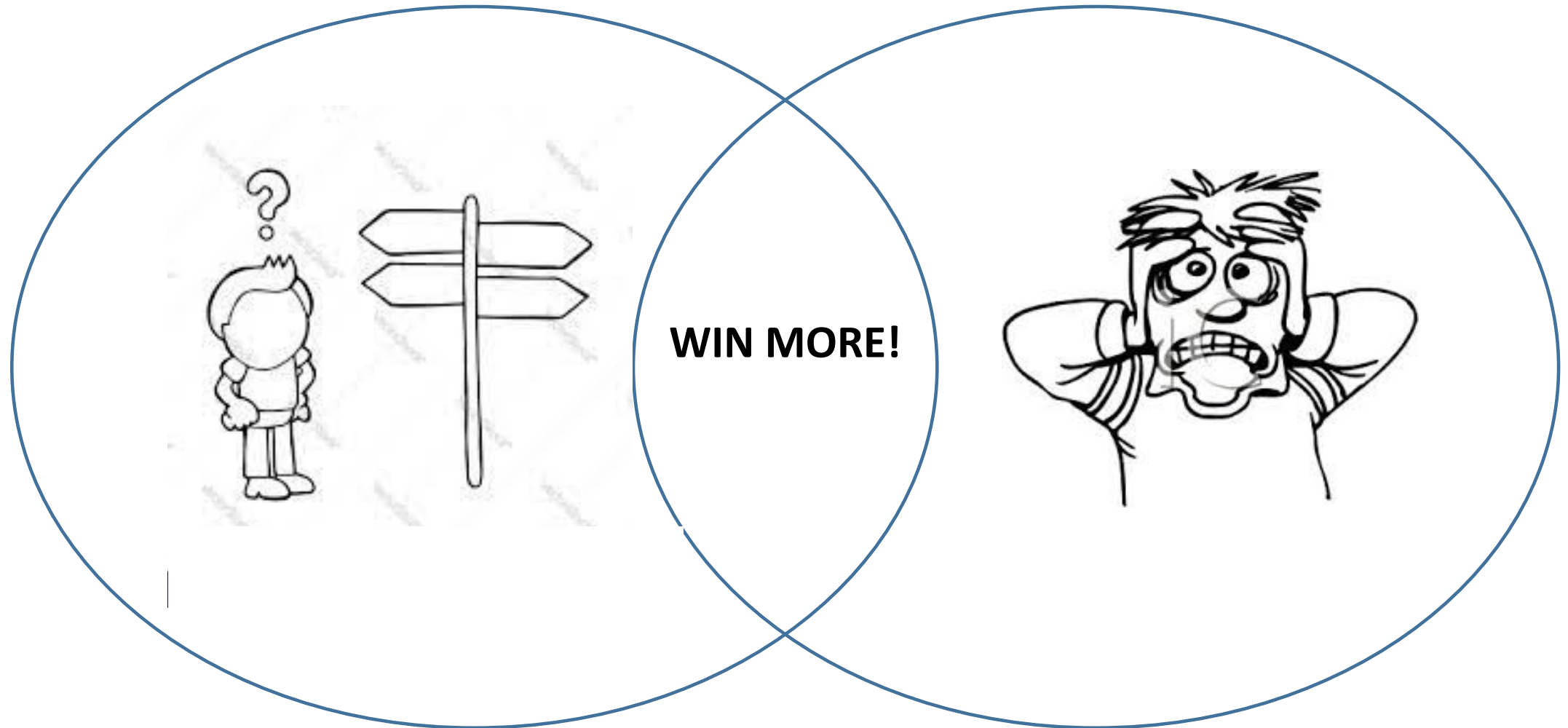
*Social Capital Refers To Building Relationships That Can Lead To Financial Benefits”*

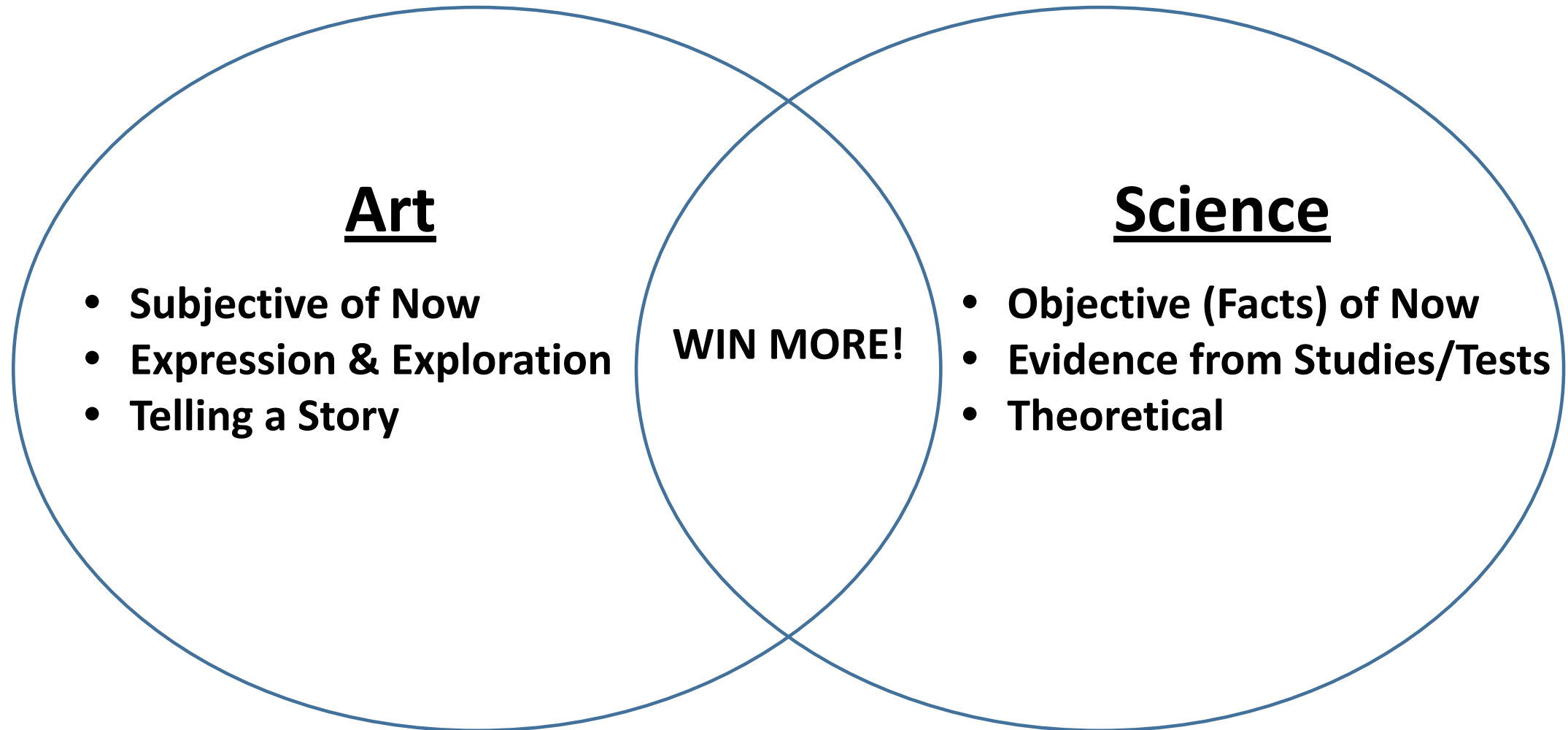




**WIN MORE!**











**WIN MORE!**



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**WIN MORE!**



***“Planned, Managed Growth”***

***“Diverse, Centered Relationships”***



***“Only Can Improve What is  
Measured...and Can Only Measure a  
Number”***



***“Measuring Who People Know  
Not Only What They Know”***

## In-Bound (Active)

They are

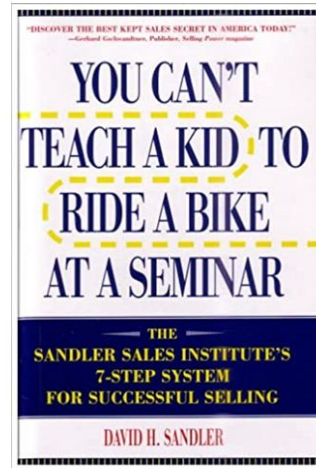
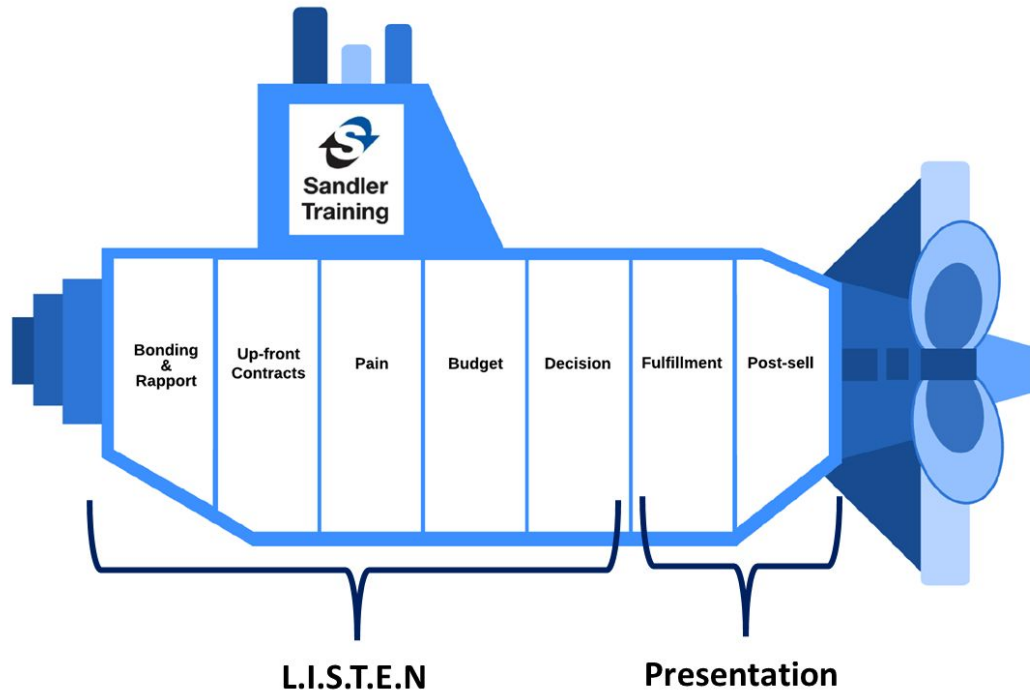
- In the market and actively seeking
- Researching, investigating, and buying

## Out-Bound (Passive)

They are

- Your target audience
- Able to buy your products or services, if their window of opportunity is open

## Sandler Sales Submarine



## Webinar (Recording): Best Practices in Sales/Business Development to FIND & WIN CONTRACTS!...with Sandler Training

How to find and win your next contract



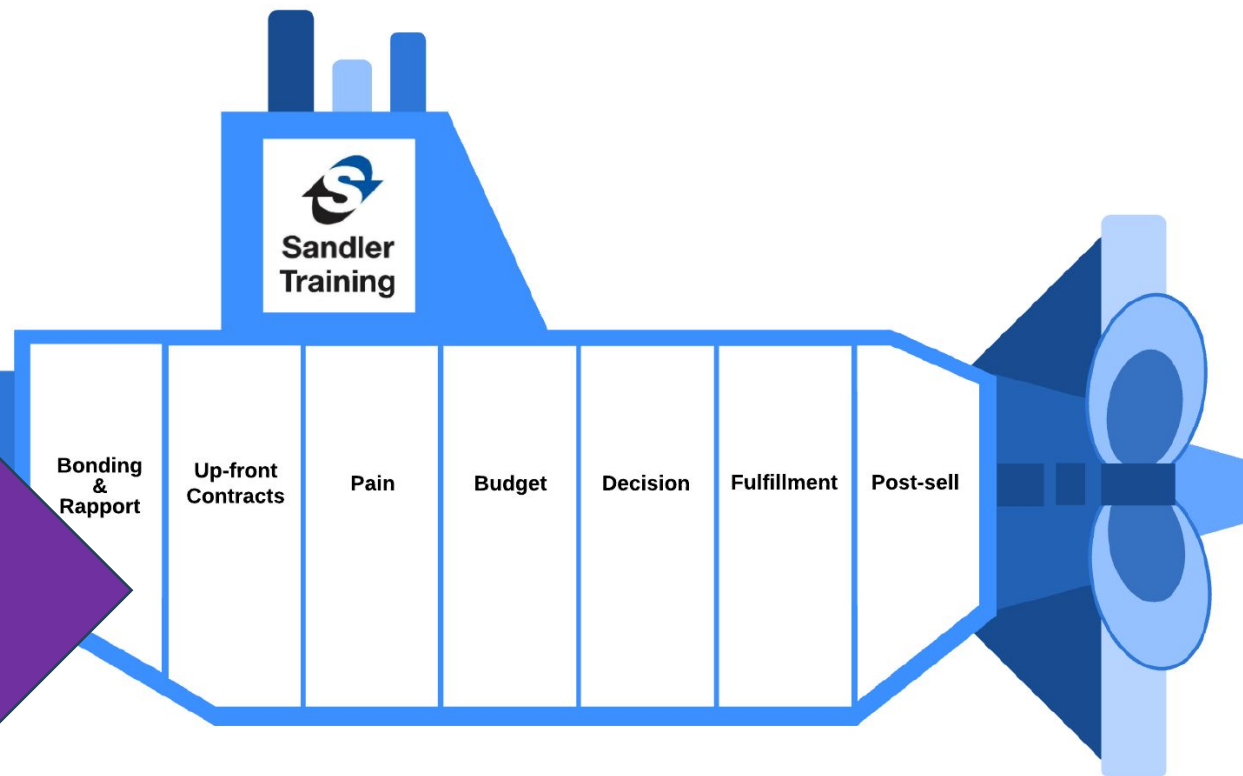
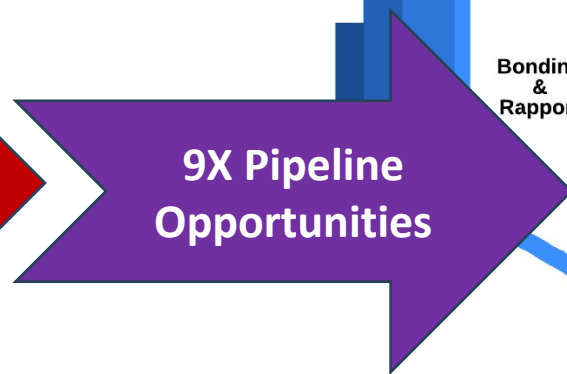
[www.marylandsbdc.org/accelerator](http://www.marylandsbdc.org/accelerator)

## No sales because I am Communicating...Wrong...

1. **Person:** NOT Decision Maker with Money - **3 Decision Makers**
2. **Thing:** NOT Solving Person's Known Problem - **3 Different Problems**
3. **Way:** NOT Place, Personality, Generation, Learning Style - **Not Enough**

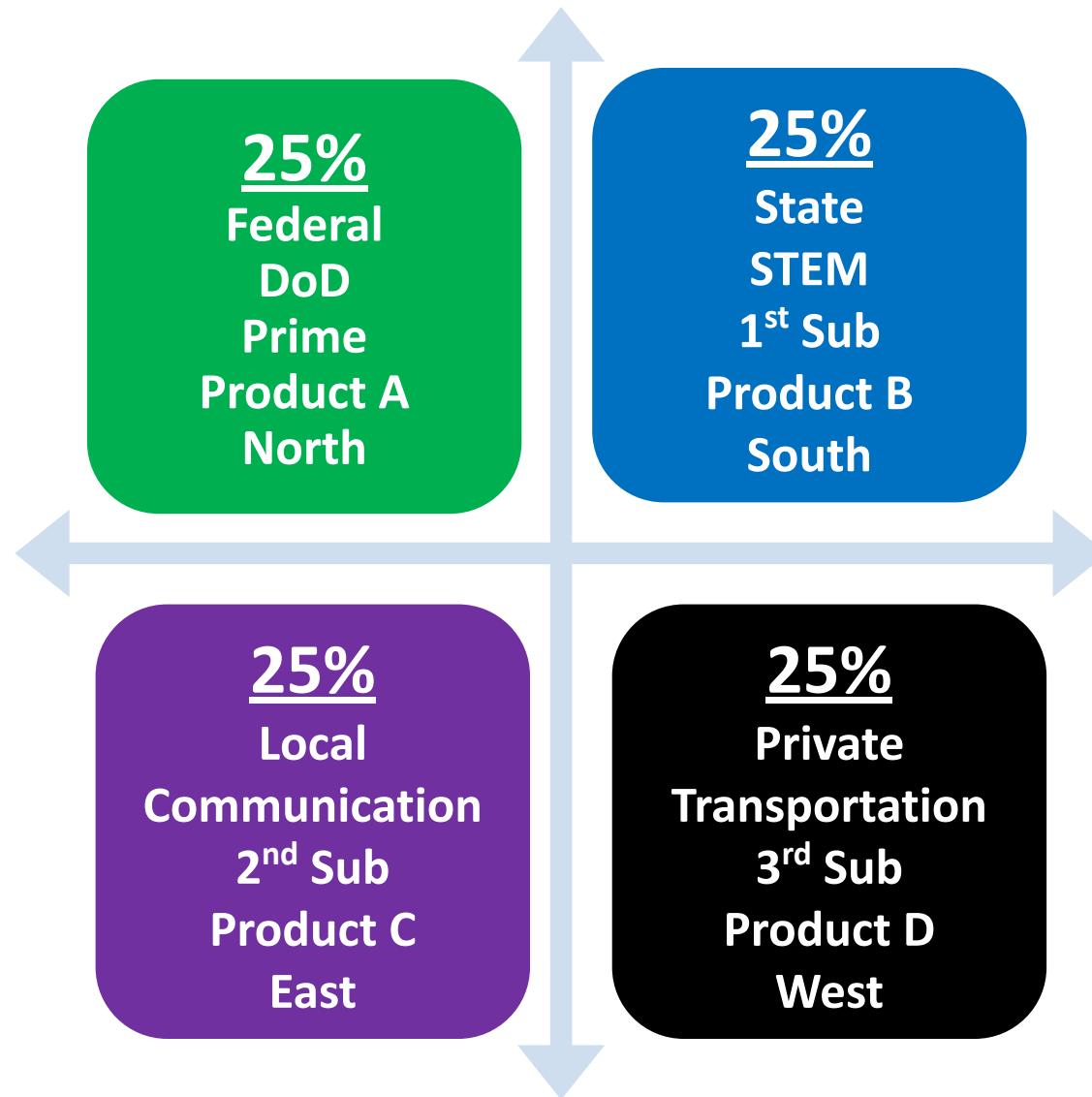


## Sandler Sales Submarine









## **SOCIAL**

Relationship with  
3 Roles - Individual(s)

- Program Director / Project Officer/ User  
SCORE: 1-6
- Contracting Officer / Legal Department  
SCORE: 1-6
- Small Business/Supplier Diversity  
SCORE: 1-6

**Social SCORE 3-18**

## **CAPITAL**

Contracting Opportunities  
Organization - Agency Level:

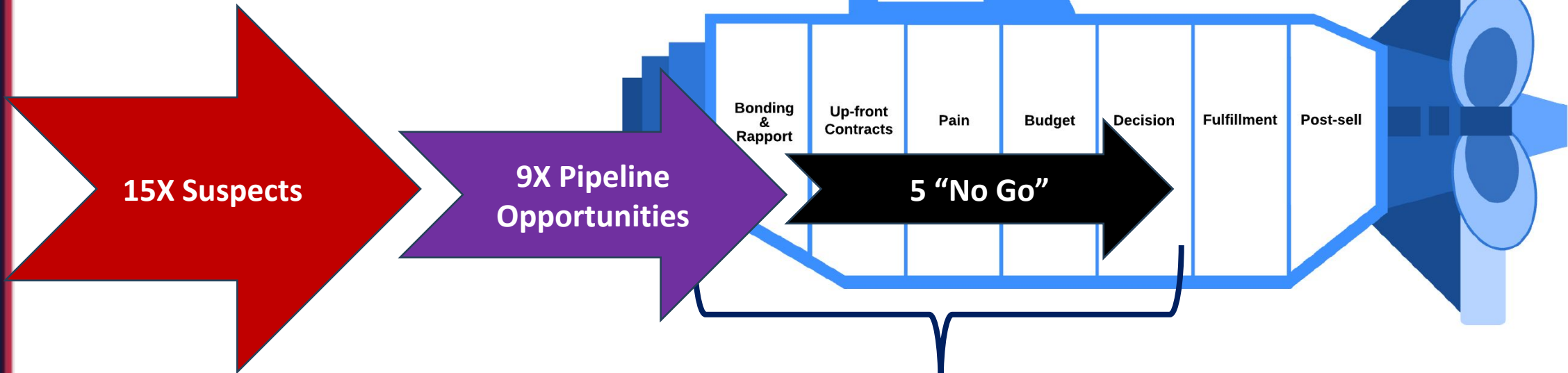
- Current Active Buying  
SCORE: 1-6
- Immediate Past Active Buying  
SCORE 1-6
- Immediate Future Passive Buying  
SCORE 1-6

**Capital SCORE 3-18**

**Social + Capital = Total Score for Pipeline (6-36)**

**A = Top 15%   B = Middle 45%   C= Bottom 40%**

## Sandler Sales Submarine



L.I.S.T.E.N



"We have two ears  
and one mouth  
so that we can  
listen twice as much  
as we speak."

*Epictetus*  
*Greek philosopher*  
*c. AD 55-135*



# RELATIONSHIP

**A**CCCEPT NEED

**B**ELEIVE IN SOLUTION

**C**ALL TO ACTION

**4 Vehicles**  
**3 Months**  
**9 Exposures**

**Baby Boomers**

**3 Vehicles**  
**3 Months**  
**7 Exposures**

**Generation Xs**

**4 Vehicles**  
**3 Months**  
**9 Exposures**

**Millennials**

**4 Vehicles**  
**3 Months**  
**13 Exposures**

**Generation Z**

**4 Vehicles**  
**3 Months**  
**19 Exposures**

## Examples Activities :

- Anchoring
- Signaling
- Compassion
- Assistance
- Reciprocity
- Trust
- Information





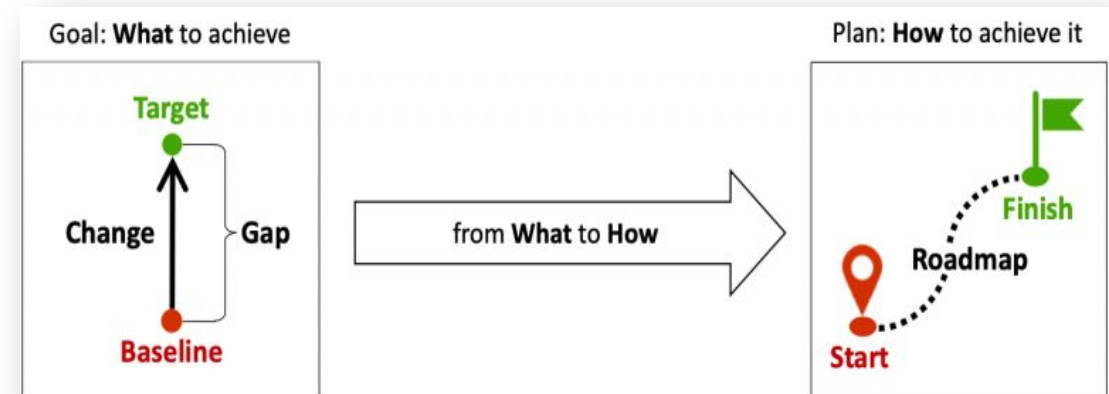
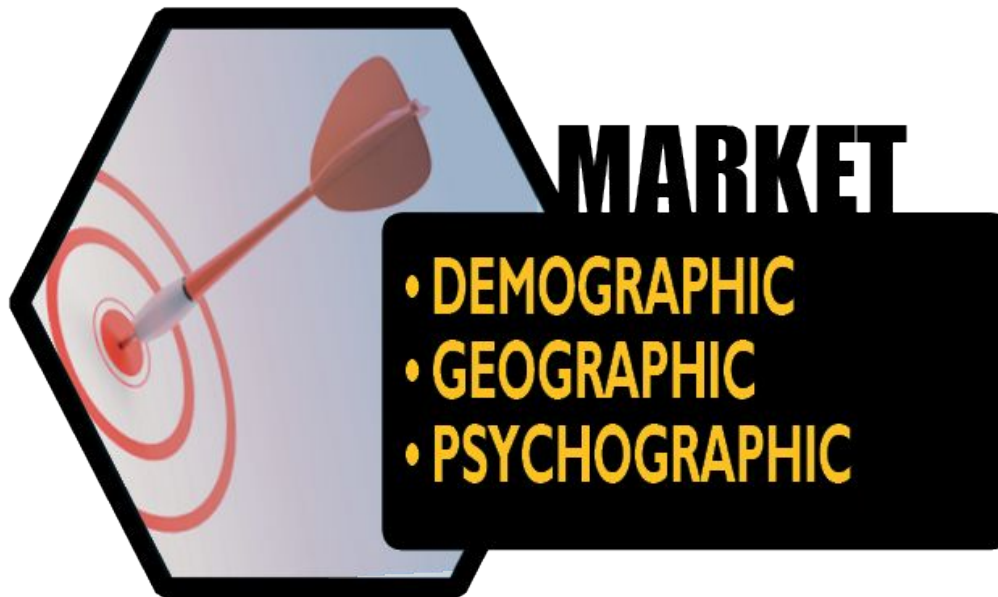
Set Goals 1-2% Increase Naturally

Measure 1-2% Increase Naturally

**2-4% Increase Naturally**  
**Break Down into Small Pieces**  
**for Impact**

# Ask 3 Key Questions to Build Pipeline

1. What do you buy?
2. What don't you buy?
3. How do you buy?



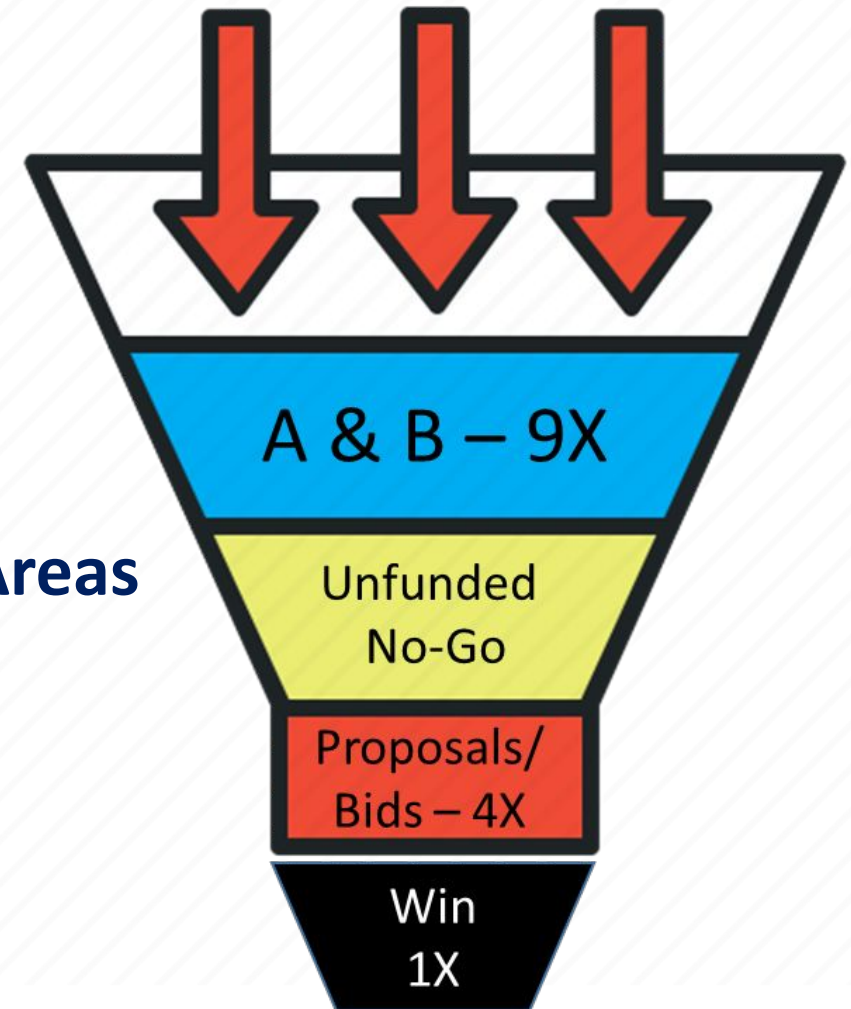
**Goal: 10 Contracts for \$200K Revenue**

**Suspects: (15X): 150 Contracts for \$3M in 4 Areas**

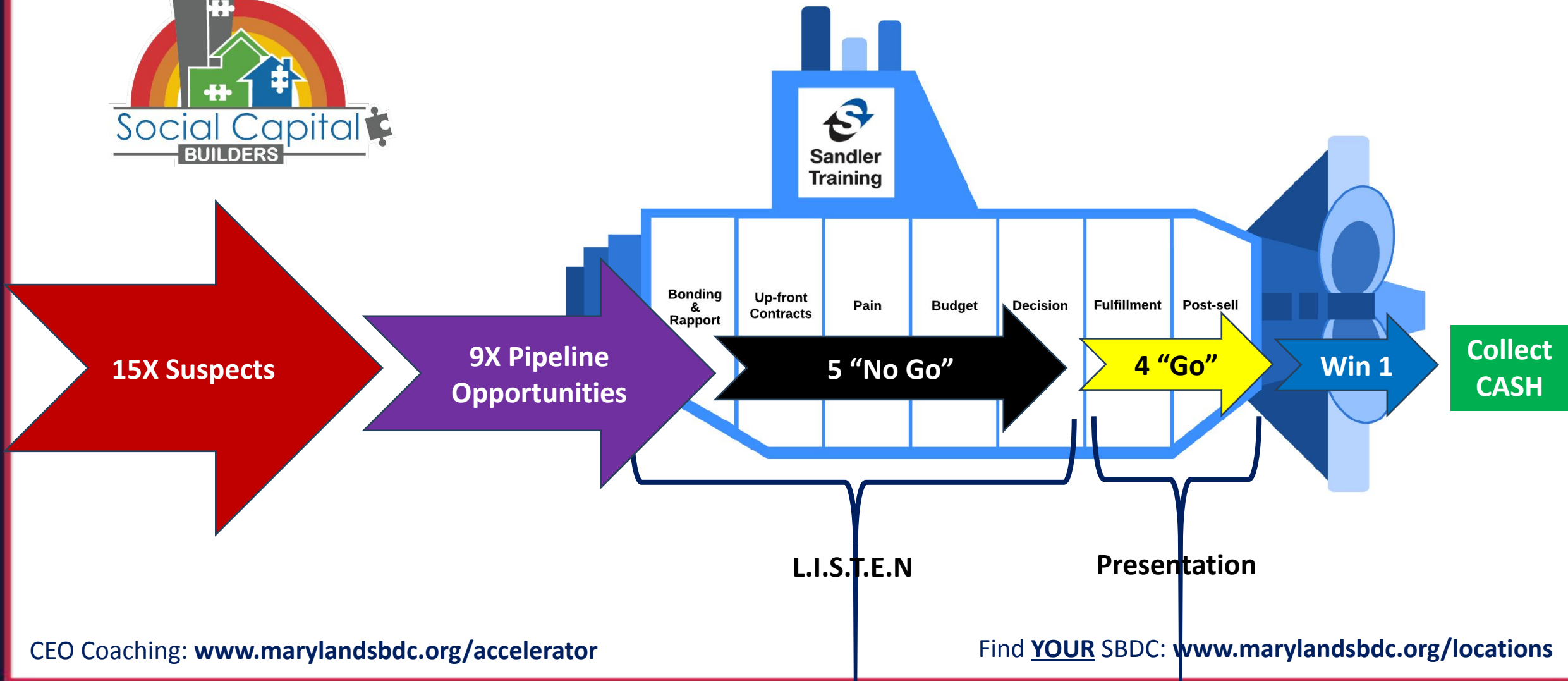
**Pipeline (9x) of Prospects (A&B): 90 \$1.8M in 2-3 Areas**

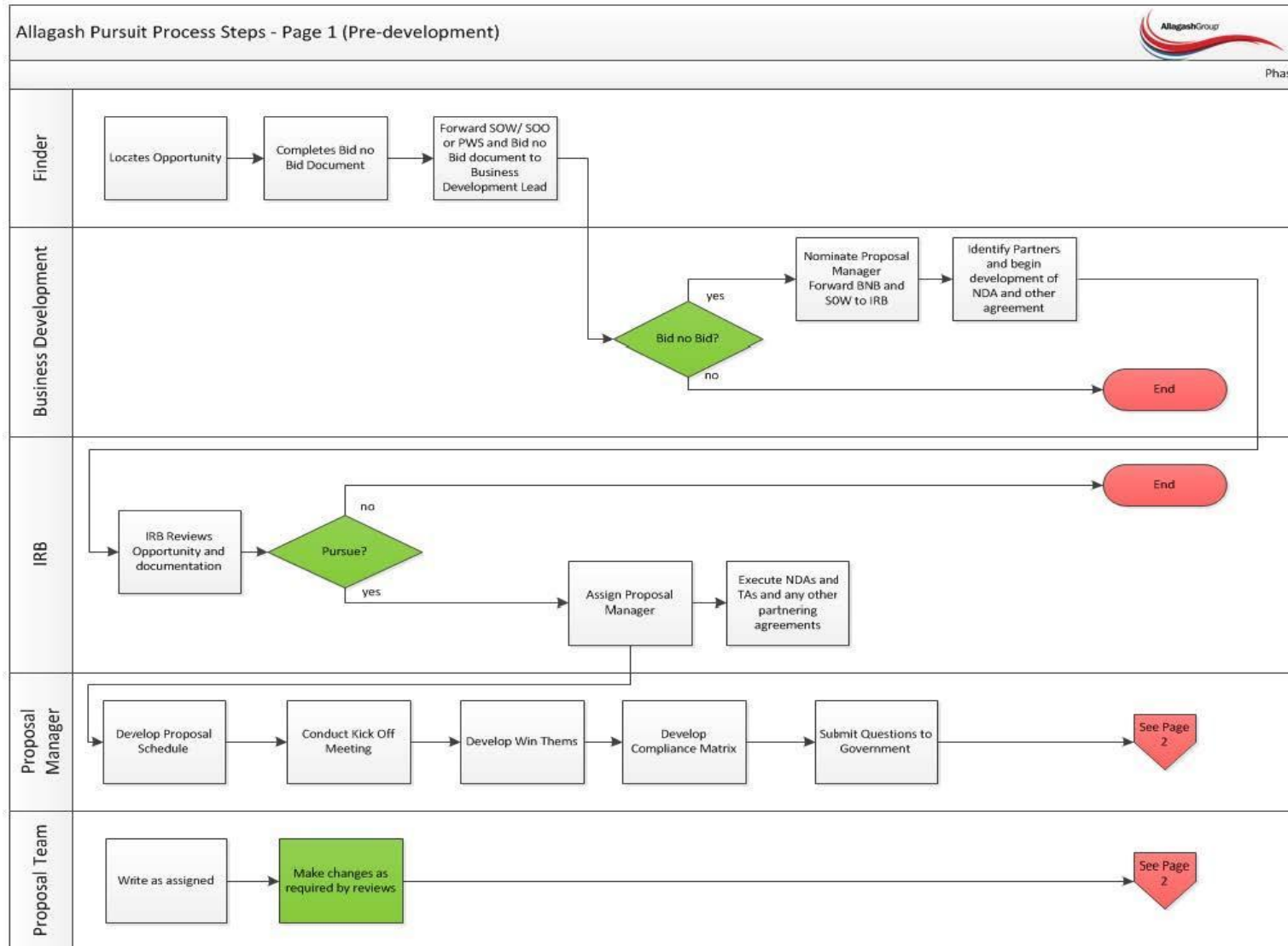
**Proposals/Bids Submitted: 40 for \$800K**

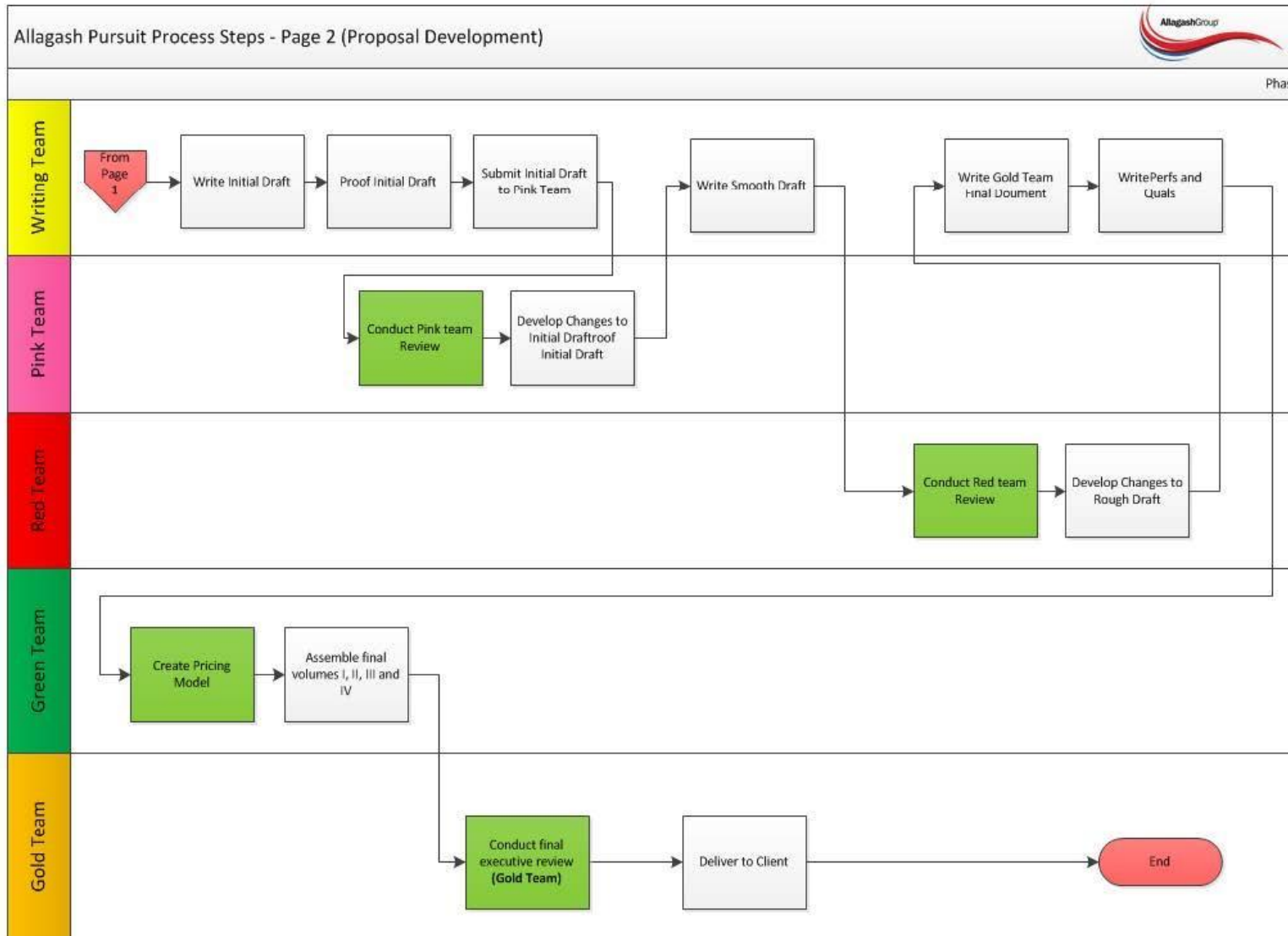
**PWIN: 25%**



## Sandler Sales Submarine







## Demonstrate You are in that 1% having BOTH Profitability & Sustainability

## Line of Credit & Bonding Capacity on Capability Statement



### Capabilities Statement

Supporting your organization by removing communication and diversity, equity, inclusion, and accessibility (DEIA) barriers.

#### Certifications

- 8(a) Certified, Case No. C0060e
- SAM Registered
- Annual Revenue less than \$4 Million
- Cage Code: 3U9V8
- DUNS # 961918658
- EDWOSB
- Bilingual Language-Speech-Hearing Association, Inc. - Certified speech & accent neutralization consultant
- Thunderbird University - Certified China business cultural awareness consultant

#### Primary NAICS Code:

611430 Professional and Management Development Training

#### Additional NAICS Codes:

- 541430 Graphic Design Services
- 541611 Administrative & General Management Consulting Services
- 541612 Human Resources Consulting Services
- 541618 Other Management Consulting Services
- 541720 Research & Development in the Social Sciences & Humanities
- 541810 Advertising Agencies
- 541820 Public Relations Agency
- 541910 Marketing Research & Public Opinion Polling
- 541990 Translation & Interpretation Services
- 541990 All Other Professional Scientific & Technical Services
- 561920 Convention and Trade Show Organizers
- 611630 Language School
- 611699 All Other Miscellaneous Schools & Instructors
- 611710 Educational Support Services

(We accept credit card payments.)

#### Services & Solutions (available online)

- Diversity, Equity, Inclusion and Accessibility (DEIA) Consulting
- Expert translation from top linguists
- Simultaneous and consecutive interpretation for events, calls and meetings
- Conferences, Meetings & Webinars Organizers
- Media Training
- Culturally-competent graphic design from our multi-lingual design team
- Scientific and Technical Presentational Skills
- Power Networking Across Cultures
- Effective Communication for Non-Native English Speakers

#### Core Capabilities and Benefits

TransPacific Communications supports both public and private sector clients through translation, interpretation, DEIA assessment and training to improve the cultural competencies of your entire organization. We focus on breaking cultural barriers by providing culturally appropriate graphics, translated materials, and interpretation to effectively communicate with your audience. Our multi-lingual team alleviates breakdowns in communication by assisting people of diverse nationalities and cultural backgrounds through improved cross-cultural communications.

TransPacific Communications champions clients through DEIA consulting, analysis, assessments, surveys and training to improve the cultural competencies and advance the level of DEIA in the entire organization. **We believe** your organization can become more **Diverse, Equitable, Inclusive, Accessible** - and more human-centric. **We develop** strategic DEIA plans, review and remodel policies and programs within the organization, design and deliver tailored training, and advise organizational leadership. **We bring together** essential DEIA, culture, and engagement initiatives into a cohesive, integrated whole, and analyze and employ data to support clients in harnessing their potential.

Our cross-cultural communication programs help employees develop the skills needed to overcome professional, cultural, and communication barriers, boost morale, confidence, cultural competencies and overall communication of the organization. We have the ability to tailor our cross-cultural communications training to address your specific DEIA, cultural and communication needs.

**Dottie Li, Founder & CEO**  
301-928-7299 | [dottie@trapac.net](mailto:dottie@trapac.net)  
TransPacific Communications | [www.trapac.net](http://www.trapac.net)

#### Company Overview

TransPacific Communications has more than 20 years of expertise in cross-cultural communications, coaching, consulting, and media training. We are an 8(a) Certified, Economically Disadvantaged Woman Owned Small Business (EDWOSB) and have been providing communication training for public and private sector clients.

#### Government Clients



- Translation and Interpretation
- Diversity, Equity, Inclusion and Accessibility (DEIA) Consulting
- Conferences, Meetings & Webinars Organizers
- Power Networking Across Cultures Training
- Cross-Cultural Communication Training
- Personal Branding Training
- How to Deliver a Winning Presentation Training
- Effective Communication for Non-Native English Professionals
- Keynote Speaking
- Media Training

#### Commercial Clients



#### Contact Us

TransPacific Communications | [www.trapac.net](http://www.trapac.net)  
301-928-7299 | [dottie@trapac.net](mailto:dottie@trapac.net)

#### What our clients say about us

*"Your excellent presentation emphasized the powerful message on the importance of diversity, multiculturalism, and inclusion in the total workforce community. Your efforts will help the U.S. Coast Guard become a leader in diversity management within the federal government and a model for the nation."*  
ADM. T.W. Allen, United States Coast Guard

#### About the Founder

Dottie Li, founder and CEO of TransPacific Communications, is an expert on cross-cultural communications and workforce diversity. Her mission in life is helping remove communication barriers and improving cultural competencies in the workplace.

Dottie was featured on NPR as a translation expert. Her groundbreaking work has been profiled on NPR, Voice of America, CGTN and China Daily and other media outlets. She is a certified accent modification trainer. Her voice can be heard by millions as the Voice and Voice Coach of Rosetta Stone's Mandarin products.

Dottie was awarded one of Maryland's Top 100 Women in 2020 and 2015 by the Daily Record and a Mandarin Leader in America in 2018. She received the "Best Cross-Cultural Communicator of the Year" title in 2013 by the MWCA.

Dottie is a Commissioner on the Maryland Governor's Commission on Asian Pacific American Affairs and a board member of Montgomery Television.

Dottie is a graduate of the University of Mobile in Alabama and Hefei University in her native China.



# Business Value

Source: Exit Planning Institute (EPI)

**5 x EBITDA**

**Cost of Capital - Inflation**

$$\frac{5 \times \$100,000}{.33 - .03} = \$1,666,666$$

$$\frac{5 \times \$100,000}{.18 - .03} = \$3,333,333$$

**Independently Owned Business's Cost of Capital: 8% - 40+%**  
**Based on "Investor's" View of Risk & Opportunity**



# Profitability (Money) – 5 Drivers

---

Sustainability (Time) – 5 Align – 18 Area

# Contractor's View

5 x EBITDA

Cost of Capital - Inflation

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$$\frac{5 \times \$100,000}{.18 - .03} = \$3,333,333$$

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# Underwriter's View

Source: Exit Planning Institute (EPI)

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# Profitability (Money) – 5 Drivers

---

Sustainability (Time) – 5 Align – 18 Area



**“This is how I look now. This is what I want.  
How do I need to look to get what I want?”**

**Consulting Role, Never Decision-making Role**

# Debt Service Coverage

- For every **\$100k LOC @ 5.75%**, 5yrs = **\$2,000/month** (Rounded) Net Yearly Cash Flow of \$24,000 = 1:1 Match
- Underwriters Businesses Capability to Re-Pay the debt, **aim for 1.5x** (The higher the better) **\$36,000**

**PLUS Collateral as Plan B**

## SUMMARY PROPOSAL FOR \$125,000 TO EXPAND WHOLESALE & LIMITED RETAIL THE GOLD & SILVER EXCHANGE LLC



### Company Information:

**Legal Name:** The Gold & Silver Exchange LLC  
**Address:** 8186 Main Street, Oneonta NY 13820  
**Web:** www.goldandsilverexchange.com  
**Phone:** 607-342-2696  
**Email:** bgoldbug@goldandsilverexchange.com  
**EIN:** 27-5727977  
**Date Established:** October 2018

### Ownership

**Current Owners:** Brenda Gomez 100%  
**To Hire:** Full-Time Assistant (Year 3) **Owner Experience:** Project Management (30 years); Diamond Grading Certified Gemological Institute of America 1994

### Personal Financials

**Total Net Worth:** \$8,063 (SBA Form 413)  
**Credit Score:** 638 (VantageScore)

### Collateral Summary

Collateral	Value	Market Value	Prior Liens
Commercial Property	\$0	\$0	\$0
Inventory (6 Months)	\$125,000	\$25,000	\$0
Equipment & Signage	\$0	\$0	\$0
Owners' Personal Property	\$200,000	\$208,000	\$232,000
Total Market Value		\$257,000	
Less: Prior Liens		\$232,000	
<b>Net Collateral Value</b>		<b>\$25,000</b>	
Market Value: Personal Property (80% Value), Inventory (20% Value)			

**Description:** The Gold & Silver Exchange LLC is a licensed precious metal dealer that has the opportunity to increase the volume of wholesale purchases of gold, silver, and platinum transactions from less than \$15,000 to \$89,000 monthly by the end of year 3, thanks to a capital injection. By the end of year 2, the company needs to hire an experienced assistant and begin 12 retail events that would coincide with Oneonta events. Despite having limited marketing with only 7 contacts per week, the company has to turn away or delay 50% of all requests by people to sell their gold for cash as it can only do 20 transactions per month, each valued at \$487. Since 2018, the company has operated 355 days per year, purchasing old jewelry, coins, flatware, dental gold, and diamonds from primarily senior citizens for a cash purchase at melt value and selling to area precious metal dealers (Tier 1) for less than a 160% markup value. However, COVID restrictions and the illness/death of the owner's brother have led to lower numbers in 2019. The company owns inventory outright (after holding it for 18 days as required by NY State law) which allows for higher margins compared to traditional retail stores that finance or take a memo of inventory. As the company needs to turn inventory over quickly for cash (within an average of 21 days), it can only sell to Tier 1 clients. With the ability to acquire more metals and hold that inventory for an average of 54 days, the company can sell directly to national refineries (due to the soaring demand - source Bloomberg.com) and during the monthly Oneonta events (Tier 2 clients) for a markup greater than 161%. Inflationary/recessionary indicators create the need for families to have cash, and stay-at-home policies for senior citizens result in a pent-up demand to sell their precious metals. With additional cash profits, the company can expand its operations and sell to Tier 3 clients (retail at the current location) at a markup greater than 172%. However, financial projections do not include Tier 3 transactions. According to the 2021 Big Survey results, jewelry retail is expected to have their "best ever" or "better than average" sales, making it a once-in-a-decade year for sales.

The owner has never been involved in bankruptcy or insolvency proceedings. There are no pending lawsuits; not under indictment, parole or probation.

1. Current Request
2. Company Information
3. Description
4. Owners & Team (Inside Experience)
5. Personal Financials & Collateral Pledged +
6. Owner's Character
7. Project Uses (Past, Current, Future)
8. Revenue Sources
9. Historical & Projected Financials
10. Professional Team (Outside Experience)

## Worksheet 19

### USES

Building & Improvements	\$0
Inventory	\$125,000
Working Capital	\$5,000
<b>TOTAL USES:</b>	<b>\$130,000</b>



I had to write a positive review for Gold and Silver Exchange because my aunt and I dealt with them on several occasions - and each and every time they more than impressed us with their knowledge, courteous service and honesty. They broke down everything we needed to know so we feel safe when dealing with them - I recommend them to anyone looking to sell gold, silver, and platinum. - Shelly H. - Hartwick, NY

### SOURCES

Owner Investment	\$5,000
Loans:	\$125,000
New Equity Investors	\$0
<b>TOTAL SOURCES:</b>	<b>\$130,000</b>

Gold & Silver Exchange exceeded my expectations by offering 30% more cash than any other competing merchant (for my platinum and silver). They have a smooth and efficient operation and I will definitely come back when it is time to sell more platinum. Thanks again! - Melissa N. - Albany, NY

Great company. Great service. Will recommend, they made me an all cash offer for my old jewelry, that was so good to receive. I got paid YEAH!!! - Alan F. - Bangor, NY

	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6
Prospective Sellers	1,218	1,340	1,473	1,621	1,783	1,962
Sellers	195	236	285	345	418	506
Avg. Purchased/Seller	\$879	\$966	\$1,063	\$1,169	\$1,286	\$1,415
Avg. Trans/Seller (RND)	2.11	1.95	2.12	2.29	2.92	3.21
<b>Purchases / Inventory</b>	<b>\$362,080</b>	<b>\$445,233</b>	<b>\$641,458</b>	<b>\$924,723</b>	<b>\$1,567,327</b>	<b>\$2,295,722</b>
Avg. Mark-Up (RND)	161.3%	163.9%	166.7%	169.5%	171.9%	175.1%
<b>Revenue</b>	<b>\$584,000</b>	<b>\$729,890</b>	<b>\$1,069,097</b>	<b>\$1,567,327</b>	<b>\$2,693,677</b>	<b>\$4,020,494</b>

### Historical Financials & Projections (Created by Emami Business Services)

Projections: 5 years of financing at 12% (interest, points & fees) & 4% origination fee. **Seek a better offer.**

	2019	2020	2021	J-A 2022	Year 1	Year 2	Year 3	Year 4
<b>Total Revenue</b>	\$378,669	\$173,783	\$366,219	\$125,858	\$584,000	\$729,890	\$1,069,097	\$1,567,327
<b>Gross Profit</b>	\$97,853	\$21,557	\$130,207	\$47,810	\$221,920	\$284,657	\$365,639	\$578,124
<b>Net Income</b>	\$34,934	\$2	\$49,944	\$42,458	\$38,609	\$93,530	\$138,177	\$293,353
<b>Debt Expense</b>	\$0	\$0	\$0	\$0	\$18,955	\$11,494	\$8,719	\$5,594
<b>Minimal Owner Comp.</b>	\$34,934	\$0	\$49,944	\$28,839	\$48,000	\$50,400	\$52,920	\$55,566
<b>Total Assets</b>	\$12,000	\$12,000	\$12,000	\$16,705	\$149,198	\$220,855	\$334,385	\$599,965
<b>Total Liabilities</b>	\$0	\$0	\$0	\$0	\$105,589	\$83,716	\$59,068	\$31,295
<b>Cash on Hand</b>	\$5,526	\$2,068	\$9,563	\$191	\$24,198	\$95,855	\$209,385	\$474,965

### Professional Services:

**Precision Metal Dealer License (NY):** 379  
**Certificate for Weighing & Measuring (NY):** 93-48757  
**Professional Association:** Gemological Institute of America (GIA) graduate & alumni member  
**Current Bank of Business:** Trust

**Business Lawyer:** Clemens & Mayer  
**Business Accountant:** Emami Business Services  
**Insurance Agency:** Cooperstown Mutual  
**Business Training:** NOVA Hispanic American Chamber of Commerce's CEO Bootcamp Revenue Accelerator







## Strategic Business Growth to Win More! (Part 1) Create Systemized Plan to Earn More (61% MORE MONEY Yearly)



### Class #1: Look Beyond the Crises & Open D.O.O.R.S to Make Money - RECORDING

PRESENTATION FOR CLASS 1  
WORKSHEETS 1 & 2 in Word

RESOURCES MENTIONED IN CLASS 1:

- [Apollo 13 Movie CLIP - Square Peg in a Round Hole](#)
- [Video: The E-Myth Revisited by Michael E Gerber | Animated Book Summary](#)
- [Patch Adams Movie CLIP-How Many Finger Do You See](#)
- [Earl Nightingale Reveals The Secrets In Think & Grow Rich](#)
- [Everest: Creating Greatness](#)

ARTICLES FOR CLASS 1: [CEO Accelerator - Articles for Worksheets 1 & 2](#)

ADDITIONAL RESOURCES FOR CLASS 1:

- [E-Myth - Book Summary](#)
- [E-Myth - Entire Book](#)
- [Video: Dennis Kimbro and Daniel Ally on Think and Grow Rich](#)
- [Video: Dennis Kimbro - Think and Grow Rich - A Black Choice](#)
- [Video: The Science Of Achievement \(Law Of Attraction\)](#)
- [Video: Think and Grow Rich for Women Summary](#)
- [Think And Grow Rich - Full Audio Book](#)
- [Think And Grow Rich - Summary Animated](#)
- [Zia Ziajar - Evaluate Where You Are](#)
- [Zia Ziajar - Goal Setting](#)

### Class #2: Increase Profits 61% Year Over Year (AFTER "NEW" BASE YEAR) - RECORDING (45 Minutes) Additional Videos Totaling 15 Minutes:

- [Video: Job to be Done](#)
- [Video: 5 Ways to Massive Profits with Brad Sugars](#)

PRESENTATION FOR CLASS 2  
WORKSHEETS 3-9 & 12 in Word  
WORKSHEETS 10 & 11 PDF

RESOURCES MENTIONED IN CLASS 2:

- [Video: Clay Christensen: The "Job" of a Milkshake](#)
- [Video: 5 Financial Building Blocks](#) NOTE: Velocity is the Showed Last in the Video

ARTICLES FOR CLASS 2: [CEO Accelerator - Articles for Worksheets 3-9 & 12](#)

ADDITIONAL RESOURCES FOR CLASS 2:

- [Guide to Selling a Your Small Business - Full Book](#)

### Class #3: Strategic Execution: Getting the MOST Profitable Things Done - RECORDING (30 Minutes) Additional Videos Totaling 30 Minutes:

- [Brief Video Overview of 4 Disciplines of Execution](#)
- [Video Summary of the Book "4 Disciplines of Execution"](#)
- [Video of Discipline 4: WIG Meeting](#)

PRESENTATION FOR CLASS 3  
WORKSHEET 5 - Drive 5 in Excel

RESOURCES MENTIONED IN CLASS 3:

- [Summary of the Book "4 Disciplines of Execution"](#)
- [Entire Section 1 of Book "4 Disciplines of Execution"](#)

ADDITIONAL RESOURCES FOR CLASS 3:

- [Video Overview for "The Effective Executive" by Peter Drucker](#)
- ["The Effective Executive" - Entire Book](#)

### Class #4: Your Activities - One-Page Plan to Win More: Time & Money - RECORDING

PRESENTATION FOR CLASS 4  
WORKSHEETS 13-15 and 17 PDF  
WORKSHEET 13 - Process Improvement in Excel  
WORKSHEETS 14-18 - Growth System in Excel  
WORKSHEET 19 - Loan Summary 2 Pages in Word

RESOURCES MENTIONED IN CLASS 4:

- [Private Equity Recapitalizations: Selling Your Business Twice](#)

### Class #5: Leverage Resources: Maximize Profits in a Changing Economy - RECORDING

(2/17/22 Webinar with BWI/MAA)

PRESENTATION FROM 2/17/22 WEBINAR WITH BWI/MAA

ADDITIONAL RESOURCES FOR CLASS 5:

- <https://www.khanacademy.org/economics-finance-domain/ap-macroeconomics/basic-economics-concepts-macro/introduction-to-the-economic-way-of-thinking-macro/a/lesson-summary-opportunity-cost-and-the-production-possibilities-curve>
- <https://www.youtube.com/watch?v=1U6d5to1-4>
- <https://myipnet.it.com/news-center/Pages/Barracuda-webinar.aspx>
- <https://www.oaktreecapital.com/>
- <https://www.berkshirehathaway.com/>
- <https://www.youtube.com/watch?v=83XUJpQ2Y38> (Principals for Success)
- <https://am.lamorgan.com/us/en/asset-management/gtm/adv/insights/guide-to-the-markets>
- <https://www.marketwatch.com/>
- <https://www.citic.com/>

[www.marylandsbdc.org/accelerator](http://www.marylandsbdc.org/accelerator)



# TIME & MONEY



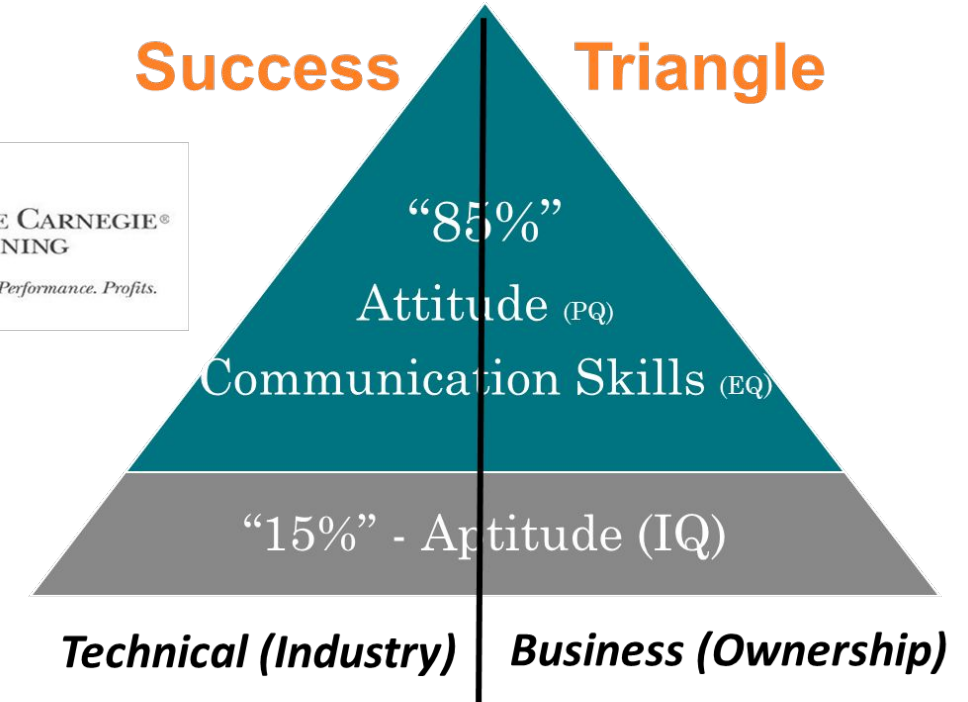
**Create more  
time-to  
generate more  
money-to  
buy more time**

	27 Monday	28 Tuesday
8 am		
9 00	COMMITMENT 1	COMMITMENT 1
10 00		
1 00		
2 pm		
1 00		
2 00		
3 00		COMMITMENT 2
4 00		
5 00		



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