Introduction

Who supports the owner/manager in a small business? Where do they get the help and personal development that their counterparts as directors or chief executives in large, corporate organisations get? How can they afford the help of the experts as they try to build a successful business?

These were some of the questions raised when three freelance colleagues and I met to consider working together on a project to help small businesses to survive and thrive in the twenty-first century. We were all “small businesses” ourselves, so who better to look at helping others in the same position? We were also all involved, to differing degrees, in the human resources field and committed to the concept of people being at the centre of business success.

In partnership with the management development section of North Yorkshire Training and Enterprise Council, we set out to try and provide the help that small businesses needed at a price they could afford.

In the year we have been working on the project up to now, our strategy and design have changed many times to reflect the feedback we have received from those we are trying to help. It also looks like changing in the future as we increasingly use our programme. We think that this is healthy as it reflects the ever-changing situation that our clients find themselves in.

Our strategy

We had all worked with small businesses in some form or another and found that a significant number of them did not use the strategic and business planning that larger, successful organisations use. Management development was also something that was often missing. Most could not afford the extra time, people or money they thought they needed to do these things. We thought that they were missing the point, which is that this

The Building Business Success programme is owned by BBS Associates (Sharon Bartram, Michael Bolton, Peter Lumley and Sue Porter). We would love to hear your comments on our project and would be happy to discuss it with you. Please contact Sue Porter. Tel: 01904 332445 or e-mail Sue.Porter1@btinternet.com for further details.
type of planning and development is best done as part of the day-to-day work and not as a separate exercise. Our main strategy therefore was to encourage small businesses to see where they were already doing planning and development and how to extend it to help their business to succeed.

One of the main problems was that small businesses, in general, cannot afford to pay for a lot of consultancy time to help them, so how could we cut this time down? We decided to design a package that would become a virtual consultant to give them the help they needed and reduce the need for a human consultant. It would be a self-use package with an introductory workshop on the best way to use it and help to set up action learning networks to give any ongoing support they needed.

As far as we knew this was a unique strategy that had not been used before.

The package

The package was aimed at the owner/managers of small businesses.

We wanted it to start with a diagnostic tool which would enable them to take a look at their business from three viewpoints:
1. as it is now;
2. as they would like it to be;
3. the changes they required to get to where they wanted to be.

Using our knowledge of our own businesses and other businesses we had worked with, we brainstormed a list of sections we thought would be useful to include. These changed as we worked on the package and identified new sections and amalgamated existing ones. The current package contains eight sections on:
1. purpose and goals;
2. expectations;
3. competitors;
4. customers, suppliers and stakeholders;
5. people;
6. skills;
7. money;
8. planning.

Exercises in each of the sections take the user through a diagnosis of their business from the three viewpoints specified above. They also encourage the owner/manager to consult with the people working for them to get their views and ideas on the business. There is an emphasis on including all the people working in the company in business decisions and on identifying the effects any changes will have on them and their work.

As we worked through the diagnostic tools we identified additional exercises which would help the user to expand their knowledge of their business or take them a step further on the road to success and these we designed in a separate “activities” file.

We also built-in evaluation of both the outcomes and the process in a separate file.

The programme

The programme begins with a free two-hour briefing session to explain what it is all about. To attract people to this initially, we published and distributed a flyer (with the help of North Yorkshire TEC) which included a short questionnaire asking the following questions:

- Do you ever feel your business survival is threatened?
- Is your business growth meeting its potential?
- Do you want to increase your competitive advantage?
- Are you under increasing pressure from competitors?
- Do you want to be able to anticipate and prepare more effectively for the future?
- Are your people holding you back from achieving business success?
- Are you facing major changes in your business?
- Are you under pressure from customers and suppliers to change and develop?

We invited the recipients to answer “yes” or “no” to each of the questions and to send in the completed questionnaire with a request for a place at one of several free briefing sessions. The briefing sessions included a short exercise where those attending could further consider the issues the questions raised for them. Even the briefing sessions gave some learning and insights and everyone who attended gained something, even if they decided not to go any further. It also informed us of the issues that our clients thought were important to them (our first line of feedback).

The next stage for those who were interested in using the package was to attend a two-day workshop to:
• receive a copy of the package;
• find out more about using it; and
• try out a sample of the diagnostic exercises.

The main idea here was to get them started and to help them to find their own pathway through the diagnostic. We had designed the package so that everyone started in the same place, with the purpose and goals diagnostic, and then plotted their own course through whichever of the other diagnostics and activities they thought relevant to them. We acknowledged that every business is potentially different and wanted the package to be as flexible as possible but covering as many areas as might be required to enable people to work on their own issues. To the same end, the exercises and activities were not designed to give answers but to ask the right questions to elicit the answers from the users.

At the end of the workshop those attending were encouraged to set up action learning groups to meet and discuss their progress, ideas and issues in having taken away and begun using the package.

**Business coaching in action**

To illustrate how our programme might work the following is a report of how I have been working with one client who is currently using it.

The client was unable to attend a briefing session or a two-day workshop, so from the beginning this was a test of the flexibility of the programme. At our first meeting, two of us met with the client for two hours to introduce the package and get them started. Since then I have met with the client to review progress.

Obviously, two hours was a short time to substitute for the two-day workshop but we managed to get a lot into the time allotted and anticipated more support in reviewing progress (a total of eight hours to be used as agreed between us and the client). This was a definite move away from the initially envisaged structure of the programme; a move made to cater for the individual needs of the client.

At the first meeting, following a general introduction of the programme, the client worked through their business and personal objectives and the issues they thought they were facing. Our interventions were mainly clarifying questions that we would expect them to ask themselves when working alone through other activities in the package. At the end of this meeting the client went away to write up the ideas and issues arising from the discussion and to start on the exercises in the purpose and goals diagnostic. At this point, we found that we were being fairly prescriptive about what the client should do as they were unfamiliar with the concept and the package and needed some guidance.

At the second meeting, a week later, the client and I reviewed their progress during the intervening week. This meeting was scheduled for another two hours. The client found that they had already made some changes to their thinking as they wrote down the initial ideas we had discussed at the first meeting. This had led them nicely into the purpose and goals diagnostic. Time had become a problem, so they had only been able to tackle a part of what they had expected to do. At this meeting we completed the exercises in the purpose and goals diagnostic and the client decided where to go next in their programme. My approach was much less prescriptive here and more facilitative as the client was more confident in using the material.

As part of our second meeting, we discussed how the client was finding working with the programme and any changes they thought would be useful. Their thoughts on the programme were:

• Although at first the material seemed confusing, once they had started to work with it they began to see where it was taking them.
• They had already identified a significant number of ideas for improving their business after a limited time using the package and found that the same issues were coming up from different questions – they saw this as an indication of being on the right path.
• They found the idea of meeting to talk over their findings with us a motivating factor for completing the exercises and a useful source of further ideas.
• They thought that a mixture of discussion meetings with a coach (i.e. one of us) and working on their own in between meetings was the best way for them to use the programme.
We have agreed a schedule of two more review sessions of an hour each and a final session of two hours. The client will then be expected to continue working with the package on their own. My approach is to reduce my interventions as the meetings progress, so that by the time the final meeting is over the client is confident to work on alone.

The future for the programme

Up until now we have used the programme in the form of a pilot to find out if it helps small businesses to survive and grow and to identify any changes needed to make the programme itself successful. From feedback we have received we think that we have a viable programme. It will inevitably require some tweaking.

The package as it stands is a good starting-point and needs only minor adjustments. We always expected that there would be additions and changes as its use increased and new issues and ideas were raised.

Early feedback from clients suggests that they need more face-to-face meetings and support than we first intended, so that they gain more confidence in using the material for themselves.

We are therefore considering the following options for the future of our programme:

- Publishing it as a stand-alone self-use package as we initially intended to be sold directly to small businesses with minimal face-to-face support.
- Including more face-to-face support in the programme – maybe even setting the programme as a series of modules with an introductory meeting at the beginning and a review meeting at the end of each module.
- Using the package solely as an aid to our own consulting work.
- Licensing other consultants to use our programme and packages with their clients.

Basically we have to decide whether we have a programme that stands alone or whether we have an aid to consulting. Feedback from clients suggests that more face-to-face meetings and reviews with a consultant are necessary. This in itself raises the problem of cost again, which we were trying to reduce in the first place.

E-coaching

We are also considering publishing the programme on the World Wide Web. In this context the client would be able to download the separate parts of the package as they required them (at a cost, of course, but they would only pay for what they used rather than the whole package). We could also include online coaching as an alternative to face-to-face coaching, which will give us more scope for helping clients outside our geographically viable area and would cut the cost to the client of using the consultant’s time.

Conclusions

With, reportedly, around 85 per cent of all current business in the UK being done by small businesses it is important that these businesses continue to function and to grow. Moreover, increasingly, large businesses are diversifying into smaller units, which may also function as smaller businesses.

There needs to be some form of support for these smaller businesses, which acknowledges their different needs and situations and, most importantly, gives them value for the money they have to expend. The support also needs to become part of the day-to-day business and not a separate entity. Large corporations can provide their own internal business support and development; small businesses need external help at a viable price.

Consultants like us need to find a viable balance between personal intervention and allowing clients the supported opportunities to help themselves.

Our continually evolving Building Business Success programme is our suggested answer to this balance problem.