2024 CCL Weekly Sessions
5pm to 6pm
Facilitators: Will Holmes and Tracy Akinade

Week 1

Agenda:

I. Updates from JHU

II. How to Advise Your Client: This week your clients are learning how to use their cash flow projections tool and to consider their exit strategy in their pricing. To prepare you to help them, we will discuss the common challenges businesses face and how to create a budget using the cash flow tool that includes aspirational investments. We will also review the Client Scope of Work document.

III. Student Q&A and Check-In: Let's discuss how your meetings have gone so far. Be ready to give an update.

How to Create A Limited “CCL Budget” with Your Client

Outside of CCL, a client would have a limited monetary budget and a set timeframe to complete the projects to address the business needs. Since CCL is free of charge to the client, the limited “CCL Budget” is not monetary and it is not set by the client. The budget is set by your team based on the work hours your team has pledged to the CCL program.

- [ ] The team must meet to agree on their total budget of hours to give to CCL.
- [ ] The team should ask the client to create a list of potential projects or create a list of potential projects to address the business needs based on your meetings.
- [ ] Then, the team must analyze the potential project list and assign a level of effort (how many hours) for each item on the list. Make sure each item is a stand-alone project.
- [ ] Meet with the client and explain the potential projects and the level of effort for each. Also explain the maximum number of hours (limited CCL Budget) that your team has pledged to CCL. Discuss the list with the hour estimates and the total possible hours to the client. Let them choose the combination of projects that will fit into the budgeted hours.

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CCL SCOPE OF WORK

Client Name:
Business Name:

Student Name:
Student Name:
Student Name:

Description of Greatest Challenge and Proposed Solution

Greatest Challenge:	Overview of Solution:

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CCL Project Overview

Week #	Date	CCL Responsibilities	Client Responsibilities
1	2/26/24	• Attend Class • Complete Homework One • Discuss Scope of Work with team • Discuss Proposed Solution with client • Get Comfortable with Cash Flow • Meet with your client	• Attend Class • Complete Homework One • Get Comfortable with Cash Flow • Work with CCL Consultants to narrow the Scope of Work • Meet with your Student Consultants
2	3/4/24	• Attend Class • Complete Homework Two • Discuss Scope of Work with team • Finalize Proposed Solution with client and request signature • Meet with your client	• Attend Class • Complete Homework Two • Finalize Proposed Solution with CCL Consultants, sign and return • Meet with your Student Consultants

CCL Project Overview

Week #	Date	CCL Responsibilities	Client Responsibilities
3	3/11/24	• Attend Class • Do well on your Finals!	• Attend Class • Complete Homework Three • Get Comfortable with Cash Flow • Return signed Scope of Work if you haven't already. Students do not work on deliverables without a signed Scope of Work!
4	3/18/24	• **Spring Break**	• **Attend Class** • **Complete Homework Four** • **Return signed Scope of Work if you haven't already. Students do not work on deliverables without a signed Scope of Work!**

Johns Hopkins Carey Business School

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CCL Project Overview

Week #	Date	CCL Responsibilities	Client Responsibilities
5	3/25/24	• Attend Class • Start working on deliverables for client • Complete Week 4 Homework • Meet with client to get information, give an update on your progress, and discuss cash flow projections	• Attend Class • Complete Homework Five • Meet with the Student Consultants to discuss Cash Flow and give them the information they need to begin work on the deliverables.
6	4/1/24	• Attend Class • Working on deliverables for client • Complete Week 5 Homework • Meet with client and give an update on deliverables	• Attend Class • Submit Completed Cash Flow Projections • Complete Homework Six (Script for Presentation) • Meet with Student Consultants and ask about their progress • Meet with Will Holmes to present final cash flow projections

CCL Project Overview

Week #	Date	CCL Responsibilities	Client Responsibilities
7	4/8/24	• Attend Class • Meet with client to present final deliverables • Assist client with implementing your deliverables in their final presentation	• Attend Class and present your practice presentation • Work on Final Presentation • Meet with the Student Consultants for their presentation on their deliverables • Meet with Will Holmes to discuss your final presentation
8	4/15/24	• Wrap up any last-minute work on your deliverables to the client • Work on your final presentation • Meet with Will Holmes to present your final presentation	• Meet with Will Holmes to discuss your final presentation • Attend Graduation and give your final presentation • Graduate CCL 2024
9		• Attend the Student Showcase • Present your final presentation • Complete CCL 2024	

NDA

MUTUAL NON-DISCLOSURE AGREEMENT

THIS MUTUAL NON-DISCLOSURE AGREEMENT is made effective March 14, 2014 between the CLIENT (Disclosing Party) and the student consultants in the Johns Hopkins University Carey Business School Community Consulting Lab. (collectively, the “Receiving Party”).

RECITALS

WHEREAS, the parties consider any and all documentation, records and materials, whether in oral, written, electronic, printed, graphical or visually perceptible form, disclosed to in furtherance of this Agreement to be proprietary and confidential and do not want them disclosed to third parties.

NOW, THEREFORE IN CONSIDERATION of the mutual covenants and conditions herein contained, the parties hereby agree as follows:

1. For purposes of this Agreement, the party disclosing Confidential Information shall be referred to as the “Disclosing Party” and the party receiving such Confidential Information shall be referred to as the “Receiving Party”. Confidential Information includes information delivered directly to the Receiving Party by the Disclosing Party or indirectly through an agent of the Disclosing or Receiving Party.

2. The Receiving Party agrees that they shall hold in strict confidence and shall not disclose any Confidential Information without the prior written authorization from a corporate officer of the Disclosing Party. The Receiving Party further agrees that they shall not utilize any Confidential Information for any purpose other than to provide consultative services to the Disclosing Party during the Community Consulting Lab.

NDA

3. For the purposes of this Agreement, the term "Confidential Information" shall mean all information disclosed by the Disclosing Party to the Receiving Party (in writing, orally or in any other form) that is described as (or provided under circumstances indicating it is) confidential, proprietary or a trade secret, including, without limitation, business plans, technical data, product ideas, contracts and financial information. Proprietary Information includes all information and any idea in whatever form, tangible or intangible, disclosed to or learned by Receiving Party, pertaining in any manner to the business of the Disclosing Party or to the Disclosing Party's affiliates, consultants, or business associates. The Disclosing Party considers the following information to be included, without limitation, in the definition of Confidential Information: schematics, techniques, employee suggestions, development tools and processes, computer printouts, computer programs, design drawings and manuals, and improvements; information about costs, profits, markets, and sales; plans for future development and new product concepts; and all documents, books, papers, drawings, models, sketches, and other data of any kind and description, including electronic data recorded or retrieved by any means, that have been or will be given to Receiving Party by the Disclosing Party (or any affiliate of it), as well as written or verbal instructions or comments; provided, however, that the following shall not be considered Confidential Information:

i. the information is or becomes publicly known through lawful means; or
ii. the information was rightfully in Receiving Party's possession or part of my general knowledge prior to exploring the possibility of a business transaction of mutual interest; or
iii. the information is disclosed to the Receiving Party without confidential or proprietary restriction by a third party who rightfully possesses the information (without confidential or proprietary restriction) and did not learn of it, directly or indirectly, from the Disclosing Party.

4. The Receiving Party shall exercise the same degree of care in the protection of the Disclosing Party's Confidential Information as it exercises in the protection of its own Confidential Information.

5. Other than as specified in paragraph 2 above, no rights, including, without limitation, licenses, trademarks, inventions, copyrights, patents, or any other intellectual property rights, are implied or granted under this Agreement or by the conveying of Confidential Information.

NDA

6. Confidential Information supplied is not to be reproduced in any form except as required to accomplish the intent of this Agreement.

7. Rights and obligations of the parties under this Agreement shall be binding upon the heirs, assigns and successors of the Receiving Party.

8. The Disclosing Party warrants that it has the right to disclose all Confidential Information which it will disclose to the Receiving Party pursuant to this Agreement, and the Disclosing Party agrees to indemnify and hold harmless the Receiving Party from all claims by a third party related to the wrongful disclosure of such third party's information. Otherwise, the Disclosing Party makes no representation or warranty, express or implied, with respect to any Confidential Information. The Disclosing Party is not liable for indirect, incidental, consequential, special or punitive damages of any nature or kind resulting from or arising in connection with this Agreement.

9. The disclosure of any Confidential Information is not intended to be interpreted that the parties have formed or will form a partnership, joint venture or other relationships. Any business relationship between the parties, if any, must be governed by separate agreement.

10. All Confidential Information, unless otherwise specified in writing, remains the property of the Disclosing Party and/or its clients or customers. For purposes of restricting the disclosure of the Confidential Information, this Agreement represents the entire understanding between the parties, and the terms of this Agreement supersede the terms of any prior agreements or understandings, written or oral. This Agreement may not be amended except in a writing signed by the parties. The provisions of this Agreement are to be considered as severable, and in the event that any provision is held to be invalid or unenforceable, the parties intend that the remaining provisions will remain in full force and effect. There are no third party beneficiaries to this Agreement. Failure by a party to enforce or exercise any provision, right or option contained in this Agreement will not be construed as a present or future waiver of such provision, right or option.

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Scope of Work Final Deliverables

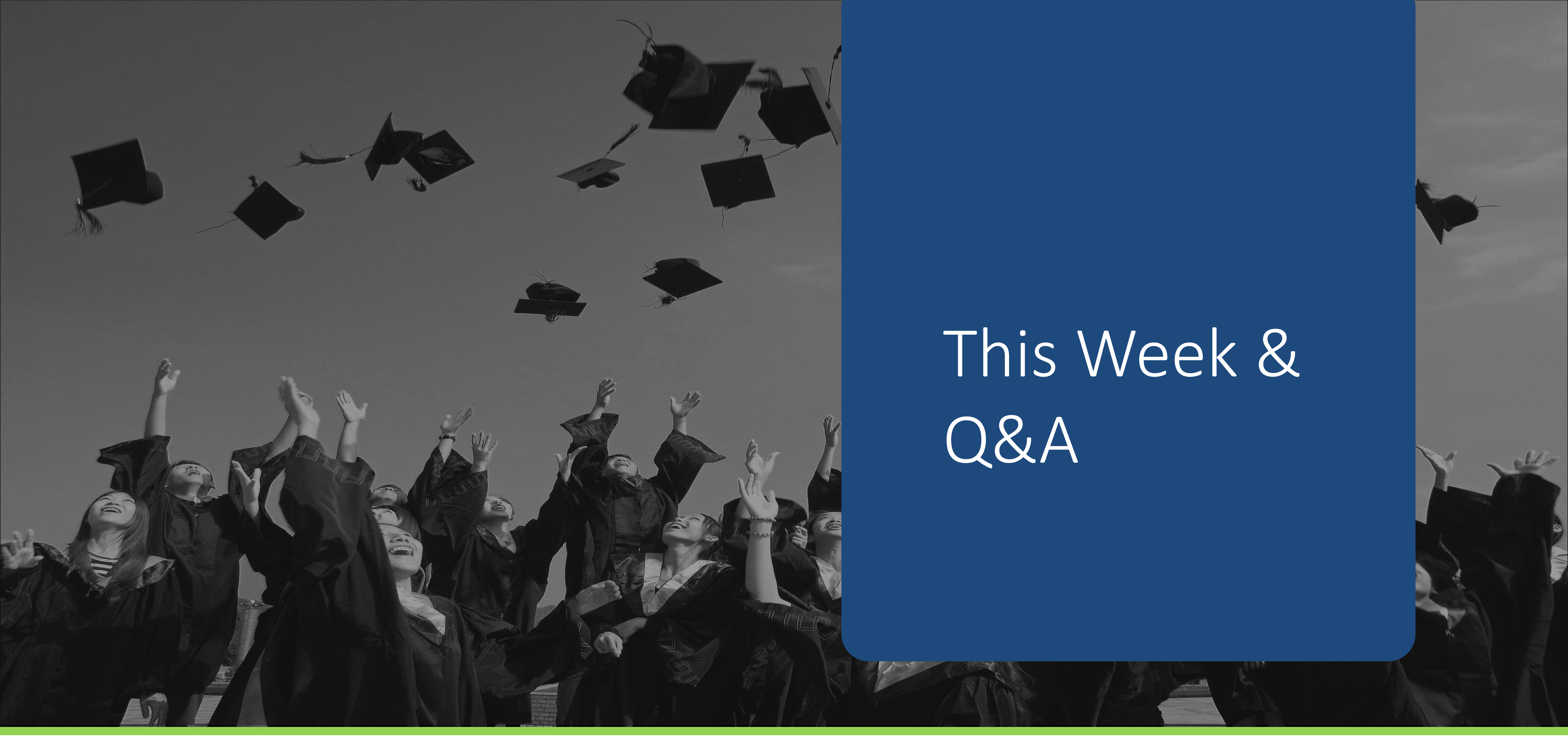
Place an X next to all that apply to the solution being developed for the client. Solutions without an "X" are not in the scope of this project. All Final Deliverables are to be presented to the client by 4/8/24. Students and the Client should sign this page.

X?	Type	Due Date
x	Assistance with Cash Flow Projections	3/25/24
x	Assistance with Client Final Presentation	3/25/24
	Strategic Planning	
	Financial Projections	
	Market Analysis	
	Marketing Plan	
	Competitor/ Landscape Analysis	

X?	Type	Due Date
	Go to Market Strategy	
	Website Update	
	Social Media Update	
	Customer Identification	
	Other	
	Other	
	Other	

Student Signatures: ____________________ ____________________ ____________________

Client Signature and Date: ____ ______________



This Week & Q&A

CCL CLIENT MEETING 2 SCRIPT
During Week 1

Recommended Conversation:

- **Thank the client for meeting with you and that you appreciate their time.**
- **Briefly re-introduce everyone. My name is _____ and my specialty is _________. I look forward to working with you.**
- **Restate their greatest challenge.**
- **Ask the client what have they done in the past to address the greatest challenge.**
- **Ask the client their timeline for implementing a solution to their greatest challenge.**
- **Ask the client once this challenge is addressed with a solution, what will that mean to their business?**
- **Ask the client once this challenge is addressed, how will they feel?**
- **Review the monthly expenses the client gathered and ask them questions to better understand their cash flow cycles, expenses and business needs.**
- **Tell the client: Every time we meet, we will give you guidance to help you through the program. This is in line with the curriculum that you learn every Monday night. Before our next meeting, continue to wok on your cash flow projections and meet with Mr. Holmes and Mr. Brown. Remember that we'll be sending you a Scope of Work for you to review and sign before our exam week starts.**

If there is time, have more conversation to find commonalities and build rapport and gain trust. This flow will help you lead the conversation and gather the info you need. You run the meetings. Do not let the meeting run you.

The Client's Past Attempts to Address Greatest Challenge

(Ask the client what they've done in the past to address their greatest challenge. Take notes.)

Timeline and Budget for Implementing CCL Proposed Solutions

(Ask the client what is their timeframe and budget to address their greatest challenge. Take notes.)

Client Homework: Work on your Cash Flow Projection Tool to perfect the 12-month budget and timeline for implementation. Remember, we'll be sending you a Scope of Work for you to review and sign before our exam week starts.

Week 2

Agenda:

I. Updates from JHU

II. How to Advise Your Client: This week they are learning about building a sustainable business and planning for retirement. To prepare you to help them, we will discuss the path to retirement for most business owners and the importance of using the customer's money and accessing capital to pay for scaling the business. We will also discuss the Scope of Work. **You should be giving your completed Scope of Work to your assigned business this week.**

III. Student Q&A and Check-In: Let's discuss how your meetings have gone so far. Be ready to give an update.

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CCL CLIENT MEETING 3 SCRIPT
During Week 2

Recommended Conversation:

- **Thank the client for meeting with you and that you appreciate their time.**
- **Briefly re-introduce everyone. My name is _____ and my specialty is _________. I will be working on _____ during the project to address your greatest challenge.**
- **Present the Scope of Work and seek feedback from the client.**
- **Take notes and make changes as needed. Remember, you decide what you can do in the hours remaining in CCL. Do not overpromise to please the client. They will always push you to do more but you must remain strong. In the future, you should be prepared to reference the scope of work to remind them of the agreement.**

- **Tell the client: Every time we meet, we will give you guidance to help you through the program. This is in line with the curriculum that you learn every Monday night. Before our next meeting, review the Scope of Work, After you review it, sign and before our exam week starts. We will start working on the solution after we receive your signed scope of work. You should also keep working on your cash flow projections with Mr. Brown and Mr. Holmes.**

If there is time, have more conversation to find commonalities and build rapport and gain trust. This flow will help you lead the conversation and gather the info you need. You run the meetings. Do not let the meeting run you.

Proposed Timeline and Budget for Implementing CCL Proposed Solutions

(Discuss your ideas using bullet points and a broad timeline. Ask the client to think about the sustainability of their business and when they want certain milestones to occur.)

Present Scope of Work and Discuss Proposed Solutions

(Discuss proposed Scope and take notes on client feedback. Make changes before sending the final Scope for the client to sign.)

Client Homework: Review the Scope of Work, sign it and return before our exam week starts.

Check-In

Week 3

Agenda:

I. Updates from JHU

II. How to Advise Your Client: This week they are learning about leading their staff and preparing their business for growth. To prepare you to help them, we will discuss some key concepts on managing a company and preparing it for sale.

III. Student Q&A and Check-In: Let's discuss how your meetings have gone so far. Be ready to give an update.

CCL CLIENT MEETING 4 SCRIPT
During Week 3

Recommended Conversation:

- **Thank the client for meeting with you and that you appreciate their time.**
- **Thank them for returning the signed Scope of Work.**
- **Briefly re-introduce everyone. My name is _____ and my specialty is _________. I have started working on _____ to address your greatest challenge.**
- **Present your progress on the project. Seek feedback from the client.**
- **Take notes and make adjustments, within scope, as needed. Remember, you decide what you can do in the hours remaining in CCL. Do not overpromise to please the client. They will always push you to do more but you must remain strong. Always refer to the scope of work to remind them of the agreement.**

- **Tell the client: Every time we meet, we will give you guidance to help you through the program. This is in line with the curriculum that you learn every Monday night. Before our next meeting, continue to work on your cashflow projections and start to look at what's expected for your final presentation. If you have questions, email us.**

If there is time, have more conversation to find commonalities and build rapport and gain trust. This flow will help you lead the conversation and gather the info you need. You run the meetings. Do not let the meeting run you.

Discuss CCL Proposed Solutions

(Discuss proposed solution and take notes on client feedback. Make changes and continue working on the deliverable.)

Client Homework: Provide feedback on what we discussed today before the next meeting.

Week 4

Agenda:

I. Updates from JHU

II. How to Advise Your Client: Last week they learned about marketing and this week they are learning about taxes, insurance, human resources and accounting requirements for their business. To prepare you to help them, we will discuss some essential marketing concepts that business owners need to understand.

III. Student Q&A and Check-In: Let's discuss how your meetings have gone so far. Be ready to give an update.

CCL CLIENT MEETING 5 SCRIPT
During Week 4

Recommended Conversation:

- **Thank the client for meeting with you and that you appreciate their time.**
- **Briefly re-introduce everyone. My name is _____ and my specialty is _________. I am working on _____ to address your greatest challenge.**
- **Present your progress on the project. Seek feedback from the client.**
- **Take notes and make adjustments, within scope, as needed. Remember, you decide what you can do in the hours remaining in CCL. Do not overpromise to please the client. They will always push you to do more but you must remain strong. Always refer to the scope of work to remind them of the agreement.**

- **Tell the client: Every time we meet, we will give you guidance to help you through the program. This is in line with the curriculum that you learn every Monday night. Before our next meeting, continue to work on your cashflow projections and keep working on your final presentation. We will ask you to see your cash flow projections in our next meeting. If you have questions, email us.**

If there is time, have more conversation to find commonalities and build rapport and gain trust. This flow will help you lead the conversation and gather the info you need. You run the meetings. Do not let the meeting run you.

Discuss CCL Proposed Solutions

(Discuss deliverables and take notes on client feedback. Make changes and continue working on the deliverable.)

Client Homework: Provide feedback on what we discussed today before the next meeting. Have your cash flow projections ready for our next meeting. We will review and answer your questions.

Week 5

Agenda:

I. Updates from JHU

II. How to Advise Your Client: This week, your client learned about access to capital. To prepare you to help them, we will discuss some essential credit concepts that business owners need to understand. Also, we will discuss tips on meeting deliverables for a client and addressing their greatest challenge.

III. Student Q&A and Check-In: Let's discuss how your meetings have gone so far. Be ready to give an update.

CCL CLIENT MEETING 6 SCRIPT
During Week 5

Recommended Conversation:

- **Thank the client for meeting with you and that you appreciate their time.**
- **Present your progress on the project. Seek feedback from the client. Remind them that you will present your recommendations and deliverables to them next week.**
- **Take notes and make adjustments, within scope, as needed. Remember, you decide what you can do in the hours remaining in CCL. Do not overpromise to please the client. They will always push you to do more but you must remain strong. Always refer to the scope of work to remind them of the agreement.**
- **Ask them to see their cash flow projections and provide feedback.**

- **Tell the client: Every time we meet, we will give you guidance to help you through the program. This is in line with the curriculum that you learn every Monday night. Before our next meeting, continue to work on your cashflow projections and keep working on your final presentation. If you have questions, email us. We will present our recommendations and deliverables next week.**

If there is time, have more conversation to find commonalities and build rapport and gain trust. This flow will help you lead the conversation and gather the info you need. You run the meetings. Do not let the meeting run you.

CCL MEETING 6
During Week 5

Discuss CCL Proposed Solutions

(Discuss your progress on the deliverable and take notes on client feedback. Make changes and continue working on the deliverable.)

Check on progress completing Cash Flow Projections

(Ask to see their cash flow projections and offer to help them set milestones for hiring, sales goals and profitability goals. Remind them that everything costs money and when they price their products and services properly, the customer is paying for everything.)

Client Homework: Provide feedback on what we discussed today before the next meeting and keep working on your cash flow projections. We will present our recommendations and deliverables next week.

Week 6

Agenda:

I. Updates from JHU

II. How to Advise Your Client: This week, your client is working on their final presentation. To prepare you to help them, we will review their final presentation template and give tips on what judges will expect. We will also have an open discussion on your deliverables to your clients. They are due by the end of this week.

III. Student Q&A and Check-In: Let's discuss how your meetings have gone so far. Be ready to give an update.

CCL CLIENT MEETING 7 SCRIPT
During Week 6

Recommended Conversation:

- **Thank the client for meeting with you and that you appreciate their time.**
- **Present your recommendations and deliverables.**

- **Tell the client: Every time we meet, we will give you guidance to help you through the program. This is in line with the curriculum that you learn every Monday night. Before our next meeting, work on your final presentation. If you have questions, email us.**

If there is time, have more conversation to find commonalities and build rapport and gain trust. This flow will help you lead the conversation and gather the info you need. You run the meetings. Do not let the meeting run you.

Present the Deliverable

Client Homework: Continue to work on your final presentation.

Week 7

Agenda:

I. Updates from JHU

II. How to Advise Your Client: This week, your client is giving their final presentation. They should be ready at this point. Also, you should have given your client your deliverables last week, but we will address any lingering questions on your deliverables. We will spend this majority of this session discussing the Student Final Presentation template.

III. Student Q&A and Check-In: Be ready to give an update on your deliverables.

CCL CLIENT MEETING 8 SCRIPT
During Week 7

Recommended Conversation:

- **Thank the client for meeting with you and that you appreciate their time.**
- **Ask the client to show their progress on their final presentation. Provide feedback and assistance as needed.**
- **Remind the client that this will be your last meeting.**
- **Tell them you are proud of them and their progress and that you are confident that they will do well with their presentation.**
- **Ask them if they will write you letters of recommendation on LinkedIn.**

- **If they ask you to continue to work on the project, let them know that you start on new projects and classes soon and you can't guarantee that you'll have time. However, if they follow the steps and recommendations you provided, they will have no trouble implementing the solution and experiencing great success.**

Client’s Final Presentation

(Assist the client with finalizing ideas for their final presentation. This is your last meeting with the client.)

Week 8
Student Consultant Showcase and Graduation
Date TBD