

# OUTREACH, INTAKE, SCREENING & REFERRAL Info Sheet

07.01.15

## Background & Introduction

As every entrepreneur knows, sooner rather than later, you need to reach out and engage your targeted customers. When your community chooses to work with entrepreneurs, your customers are the entrepreneurs you hope to help and who, in turn, will generate economic development outcomes in your community. Our ***Outreach, Intake, Screening and Referral Resource Package*** includes information and tools you can use to get started and excel at these four foundational activities.

### Meeting Development Needs

If you hope to grow your economy and create economic opportunities for your residents, you must go beyond mapping entrepreneurial talent – you must conduct outreach, engage in intake and screening, and make referrals to resource partners that can meet your entrepreneurs' development needs.

## Additional Information

Don Macke – Center for Rural Entrepreneurship  
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## Working with Entrepreneurs

Your community has made a commitment to pursue entrepreneur-focused economic development. You have undertaken our five-point opportunity assessment, including mapping and targeting your entrepreneurial talent. You have a pretty good idea with whom you'd like to work, but you have not yet begun assisting entrepreneurs. Based on your talent mapping and targeting, you are ready to move into the field and begin mixing it up with potential entrepreneur customers. Undertaking entrepreneur outreach, intake, screening and referral moves you from verifying what you're mapping and targeting to actually establishing client or customer relationships. Crafting a game plan in this critical area of activities is essential. A sound game plan will ensure efficiency and effectiveness to maximize your resources and optimize your business development impact and economic development outcomes. The resources in this package can be used to help train your team to engage in these key activities with more confidence, ensuring quality control and successful outcomes. Remember, you are likely to have only one chance to prove your value to your targeted entrepreneurs. Make the most of it by demonstrating you can really help, providing an opportunity for "repeat business" and "on the street" referrals to other entrepreneurs.



Resources included in our ***Outreach, Intake, Screening and Referral Resource Package*** include:

**OISR Guide.** Our *Outreach, Intake, Screening and Referral* resource guide provides a comprehensive review of how these key activities fit within the Center's larger entrepreneurial communities framework and a deep dive into each of the four activities. There are illustrations, sample language and guidance in using some of the tools we have provided to you as part of our Resource Package.

**Recorded Webinars.** Over the years, we have completed webinars focused on outreach, intake, screening and referral within our e2 framework. We have included some sample recorded webinars where we address these four key areas as part of a community's entrepreneur engagement game plan.

- Fall 2014 Intake, Screening & Referral with Don Macke
- Fall 2011 Branding & Outreach with Don Macke
- Fall 2011 E Visitation & Surveys with Don Macke
- Fall 2011 E Visitation & Surveys with Greg Panichello
- Fall 2011 Entrepreneur Intake & Screening
- Fall 2011 Entrepreneur Referral & Tracking

**Tools.** We have included three sets of tools that can be used to support these activities:

- Entrepreneur Surveys
- Entrepreneur Visitation Protocols
- [Intake Tools](#)

#### Thanks Greg...

We want to personally thank Greg Panichello, State Director for the Kansas Small Business Development Centers. Greg has been kind enough to share their intake tools used with new and existing businesses. We think these intake tools are among the best we have had a chance to review.

**RISE Information Page.** The Readiness Inventory for Successful Entrepreneurship is a web-based tool for measuring entrepreneurship skills developed by Dr. Thomas Lyons and Dr. John Lyons.

**Past and Future Resource Packages.** After this month, we will be releasing another e2 University resource package focused on **Client Tracking, Use of Portfolios, Metrics and Story Capture**. This resource package will help you manage your growing portfolio of entrepreneurial clients including fueling your metrics system and capturing stories that illustrate how your work is contributing to business development and economic development. You might also find our [Entrepreneurial Talent Assessment package](#), including identification, mapping and targeting, a useful resource.