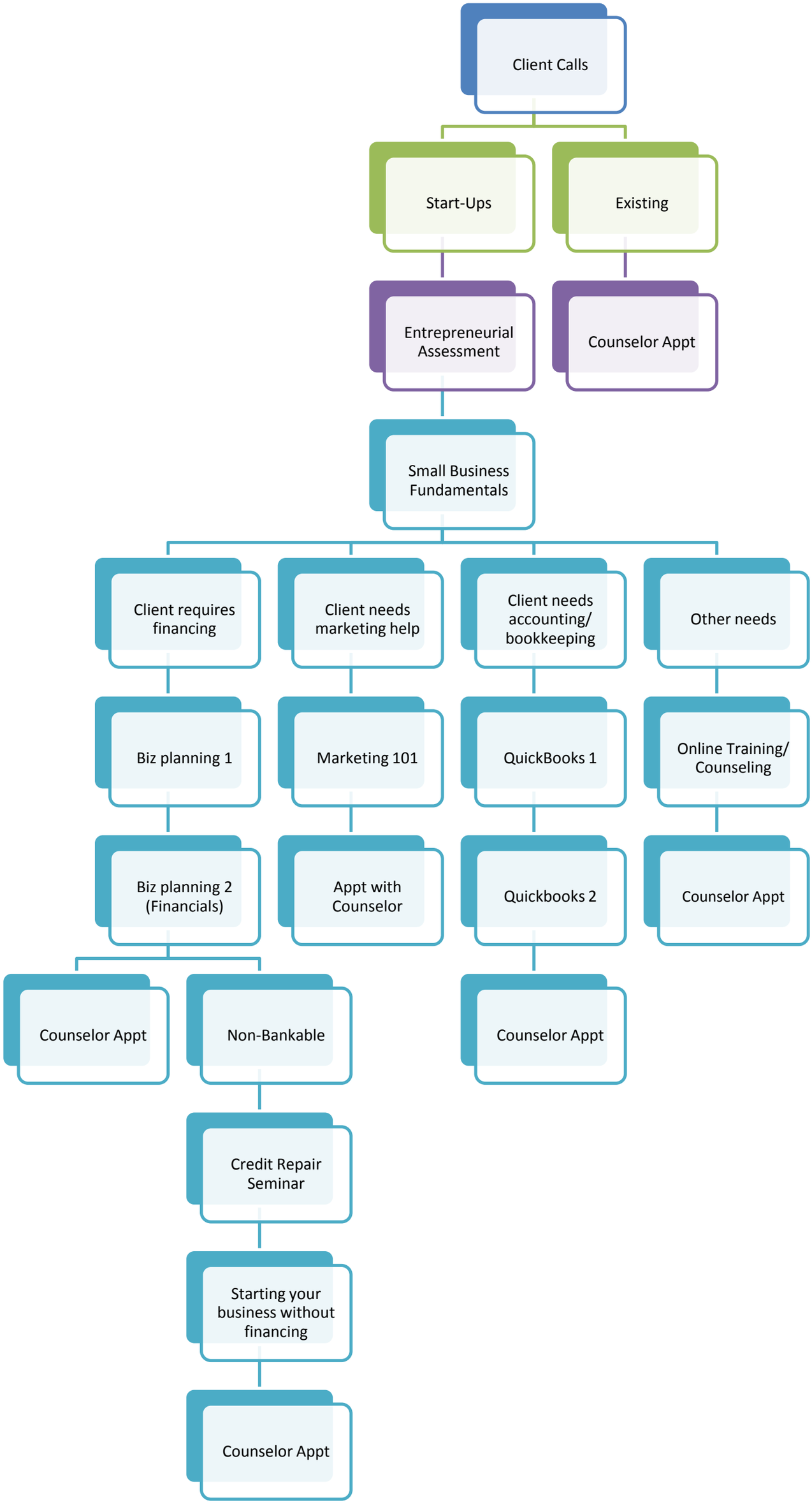
Client Calls
Start-Ups
Existing
Entrepreneurial Assessment
Counselor Appt
Small Business Fundamentals
Client requires financing
Client needs marketing help
Client needs accounting/ bookkeeping
Other needs
Biz planning 1
Marketing 101
QuickBooks 1
Online Training/ Counseling
Biz planning 2 (Financials)
Appt with Counselor
Quickbooks 2
Counselor Appt
Counselor Appt
Non-Bankable
Counselor Appt
Credit Repair Seminar
Starting your business without financing
Counselor Appt