



# Earned Revenue Accelerator

2021 Course Schedule, Catalogue & Onboarding Checklist

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Courses begin with Kickoff & Onboarding on Wednesday,  
March 17 from 12:30 – 2:30PM

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Accelerating collaborative action in Southeast  
Michigan's nonprofit community



# Earned Revenue Accelerator

## 2021 Course Schedule

### Cash flow forecasting & customer discovery

● Jason Caya, Natalie Hazen, Romy Kochan  
Wednesday, March 31, 4–7PM

### Office Hours

#### Session 1

● Jason Caya, Natalie Hazen, Romy Kochan  
Wednesday, April 7, 4–7PM

### Stakeholder buy-in & staffing operations

● Romy Kochan & Judy Muhn  
Wednesday, April 14, 4–7PM

### Office Hours

#### Session 2

● Romy Kochan & Judy Muhn  
Wednesday, April 21, 4–7PM

### Financing, tax & legal considerations

● Andrew Goldberg, Romy Kochan & Susie Wayntraub  
Wednesday, April 28, 4–7PM

### Office Hours

#### Session 3

● Andrew Goldberg, Romy Kochan & Susie Wayntraub  
Wednesday, May 5, 4–7PM

### Marketing, branding, sales & e-commerce

● Ellen Currin, Christina Devlin, Lydia Michael & Carrie Vestrand  
Wednesday, May 12, 4–7PM

### Office Hours

#### Session 4

● Ellen Currin, Christina Devlin, Lydia Michael & Carrie Vestrand  
Wednesday, May 19, 4–7PM

### Storytelling & pitch practice

● Eric Thomas  
Wednesday, May 26, 4–7PM

### Office Hours

#### Session 5

● Eric Thomas  
Wednesday, June 2, 4–7PM

### Pitch event & graduation celebration

● Co.act Detroit & special guests

Wednesday, June 9, 12:30–2:30PM

# Earned Revenue Accelerator

## 2021 Course Catalogue

Sessions facilitated by Carla McDonald

### **Session 1: Cash Flow Forecasting Fundamentals and Customer Discovery**

**Speakers: Romy Kochan, Natalie Hazen and Jason Caya**

This session will help you build a foundation for your cash flow planning. Each element of forecasting will be addressed to give you a comprehensive plan by the end of the Accelerator program.

Preparing for the class: Complete the Revenue Table Estimator and bring a recent Income Statement

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### **Session 2: Bringing Everyone Along with Your Vision**

**Speakers: Romy Kochan and Judy Muhn**

Learn board development best practices, how to assess the skills of your current board members, and address gaps, to build an effective team. Understand the types of stakeholders and how to manage them.

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### **Session 3: Accounting, Legal, and Taxes: Promise, it won't be boring**

**Speakers: Andrew Goldberg, Romy Kochan and Susie Wayntraub**

Learn the things you absolutely must know about non-profit law and taxes to run your business successfully. A special focus on issues related and unrelated earned income.

# Earned Revenue Accelerator 2021 Course Catalogue

## **Session 4: Marketing, branding, sales & e-commerce**

### **Part 1: E-commerce: How to Make it Work for YOUR Organization with Ellen Curren**

In this class, we'll discuss the basics of e-commerce, and how to determine what e-commerce platform is right for you and your organization. By the end of this session, you will understand the steps required to set up a successful online shop.

Preparing for class: If you already have a website and/or Point-of-Sale system (such as Square or Clover), it will be helpful to have login information for these accounts on-hand. I would also recommend that you begin thinking about your e-commerce needs and priorities by filling out [this optional questionnaire](#).

### **Part 2: Revisiting your brand strategy as a top priority in 2021 with Lydia Michael, Blended Collective**

As consumer behavior continues to change in 2021, businesses and marketers should focus on brand strategy to include brand purpose, value and differentiation factors. From product or service-offering to price and more, it is recommended to reassess all brand elements to best meet the needs of the post-pandemic consumer mindset. In this workshop, you will learn how (and why) to reassess your brand purpose, values, and ensure you stand out in the market to win new and retain current customers.

Preparing for class: Review and have available information about your current brand purpose (reason why you exist as a business), as well as what you determine to be your value-add to customers and competitive advantage (what makes you different compared to others who offer such a product or service).

### **Part 3: Best Practices for In-Person Selling with Christina Devlin and Carrie Vestrand, TechTown**

How to successfully sell in person using a pop-up strategy. This course will cover visual merchandising, display options, incorporating your branding, tech considerations, sales & customer service.

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## 2021 Course Catalogue

### **Session 5: Storytelling for a Cause** **Speaker: Eric Thomas, Saga MKTG**

I've got bad news for you. People aren't as logical as they pretend to be. All the data in the world can't change a stubborn ideology. But empathy, emotion, and storytelling can.

In this course, we going to learn how the power of storytelling is a powerful tool for change and how it works to change hearts then minds. Using emotion and shared human experience as leverage, we're going to create the pillars for strong stories to back up our precious data, impact, and analytics.

Preparing for the class: Bring examples of your favorite brands, commercials, or campaigns. These don't have to be in your industry or focus on your target market.

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### **Session 6: Practice your Pitch!**

Practice pitching your business and product/service to local funding organizations.

# Earned Revenue Accelerator 2021 Onboarding Checklist

## Pre-Accelerator (submit by Friday, March 19)

	Sign participation agreement
	Identify two senior-level staff to participate
	Submit a W9 for class participation stipend
	Complete pre-class survey
	Attend onboarding session Wednesday, March 17, 12:30–2:30PM

## Accelerator

	Schedule a time to meet with Lydia Michael about your branding/marketing needs
	<b>Session 1 (March 31): Cash flow forecasting &amp; customer discovery</b>
	<b>Session 2 (April 14): Stakeholder Buy-In and Staffing Operations</b>
	<b>Session 3 (April 28): Financing, Tax, Legal Considerations</b>
	<b>Session 4 (May 12): Branding/Marketing, In-Person Selling, E-Commerce</b> <ul style="list-style-type: none"><li>• Login information for your website and/or Point-of-Sale system (such as Square or Clover)</li><li>• Fill out <a href="#">this optional questionnaire</a> about your e-commerce needs and priorities</li><li>• Review and have available information about your current brand purpose (reason why you exist as a business), what you determine to be your value-add to customers and competitive advantage (what makes you different compared to others who offer such a product or service).</li></ul>
	<b>Session 5 (May 26): Storytelling</b> Bring examples of your favorite brands, commercials, or campaigns. These don't have to be in your industry or focus on your target market.
	<b>Session 6 (June 9): Pitch and Graduation</b> Bring your final pitch deck and be ready to present your story to panelists during a celebratory pitch event!

# Earned Revenue Accelerator 2021 Onboarding Checklist

## Post-Accelerator: Submit Final Report (by Wednesday, June 16)

	Gingras Global Information Report
	Cash Flow Forecast
	Impact Measurement metrics
	Pitch Deck
	Design Materials
	Final sources/Uses if Requesting Grant Funding
	Final Class Evaluation/Survey Report

# Earned Revenue Accelerator 2021 Speakers

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## Ellen Currin

Web Developer

Ellen Currin is a Detroit-based web developer and entrepreneur. She understands what it takes to launch a small business online and how to earn loyal customers.

If you're struggling with tough questions: What's your brand? Who's your audience? Why aren't website visitors buying my products? Ellen will help you get to the bottom of those problems, and find smart, cost-saving solutions so that your small business can succeed online. When she's not building websites, Ellen would almost always rather be outside: working in her garden, foraging for mushrooms, and hiking with friends.

## Susie Wayntraub

Partner, Waxenberg Wayntraub, PLLC

Susie Wayntraub is a partner in the CPA firm Waxenberg Wayntraub, PLLC, where she leads the audit team specializing in auditing not-for-profit organizations. Susie provides advisory services to not-for-profit clients, including software implementation, IRS compliance, and attest services. She possesses the expertise and knowledge necessary to guide organizations through the unique financial reporting and tax requirements of not-for-profits.

Waxenberg Wayntraub, PLLC specializes in closely held businesses and Susie services the needs of small business clients by providing accounting and tax services, including preparation of corporate and individual tax returns. Her designation as QuickBooks Advanced Certified ProAdvisor make her an excellent resource for clients.





## Natalie Gingras Hazen

Vice President & Chief Global Strategic Officer,  
Gingras Global Inc.

Managing Partner, Makers Environment Fund LLC

Natalie Gingras Hazen is no stranger to social and community impact, having spent 20 years in strategic community development in a variety of roles.

Natalie is highly strategic, and her observant nature lends the exact set of skills to social impact projects of all sizes and scopes. She carries this along with her financial background to serve as Vice President of Gingras Global since 2014.

In 2017, she formed the first skilled trade Impact Capital Investment Fund, the Makers Environment Fund. Natalie uses her background, education, and experience in the financial industry to elevate the credibility of any project she touches.

Natalie started serving on the National Small Business Associations' Leadership Council in early 2019 sitting on both the Technology Council and the Economic Council.

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## Eric Thomas

Saga MKTG

Eric Thomas is an entrepreneur, storyteller, social commentator, brand strategist, artist, and self-taught designer. His life is one that proves that many things can be true at once and no one is defined by any one part of their identity. During his career he has worked with hundreds of businesses and organizations to help them develop their brands, connect to their markets, and grow in ways they did not know was possible. Known for his unique perspective, engaging communication style, and sharp sense of humor, Eric has made a name for himself as a speaker, writer and adept networker.

His blog on LinkedIn has experienced tremendous success with over 3 million reads and been republished across the globe. As an entrepreneur, he and his business partner have built the unique "storytelling agency" Saga which has generated over 1.4 million dollars in revenue, servicing municipalities, museums, cultural institutions and national corporations. He's proud that during Saga's lifespan, over 60% of the vendors and employees have been people of color and women, proving that the pipeline issue in media is more about access and intention than lack of talent.





## **Carla McDonald**

Operations Manager, Gingras Global

Carla McDonald has a background in project management, peer-to-peer learning and specialized training. She had a 19-year career with AT&T before moving into business consulting; where she has provided services to varied industries. She has significant expertise in technical assistance services for start-up and expanding companies; providing pre-funding assistance and support after the business is launched.

Carla is eager to share her experiences with other entrepreneurs and has a genuine interest in motivating others to achieve their goals.

As Operations Manager, she analyzes the company's overall operational processes and makes certain that resources are directed appropriately.

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## **Jason Caya**

Consultant, Gingras Global

Leader and innovator with extensive domestic and global experience utilizing business expertise to found and operate both non-profit and for-profit organizations that deliver measurable social impact. Track record of closing deals with C-level executives, managing a diverse team, and understanding the challenges that face those in need. Started and operated four organizations; managed teams of five to ten people; oversaw organizations totaling nearly \$2,000,000 in aggregate revenue; facilitated countless initiatives and projects with community stakeholders; spurred tens of millions in philanthropic giving and government support; and directly impacted the lives of hundreds of people in need.



## Carrie Vestrand

Retail Services Program Manager, TechTown Detroit

Carrie comes to TechTown with over 20 years professional experience in various industries including wholesale distribution and retail. Carrie has been on the front lines of retail operations having been a small business owner for twelve years and brings a high level of understanding and experience in this area. She enjoys assisting in the development and support of small business entrepreneurs and has a strong background in retail operations including but not limited to; merchandising, product selection, customer service, promotions, store events, and pop-ups.



## Christina Devlin

Retail Services Program Manager, TechTown Detroit

As part of TechTown's Retail Services team, Christina provides support to entrepreneurs and small business owners, helping them strengthen their business concepts, create sales strategies, open brick and mortar locations, stabilize and grow. She has over 20 years experience in retail program creation and management, operations, product development and non-profit leadership at Pewabic Pottery, The Detroit Institute of Arts, and Pure Detroit.

In 2018, she started Devlin Consulting, helping small and independent businesses to become more stable and successful by creating and strengthening standard operating procedures, training staff, improving visual merchandising, optimizing inventory management, and creating long-term business strategies. In her free time, she enjoys hitting the open road with her family and visiting the weirdest roadside attractions they can find.

## Lydia Michael

President and Owner, Blended Collective

Lydia Michael is the President and Owner of Blended Collective, a multicultural marketing and brand consultancy. A thought leader in multicultural marketing, diversity and inclusion, Lydia focuses on helping brands reach and engage diverse audiences and consumers through brand, content and multicultural marketing strategy, which requires an authentically and culturally engaging approach. Her project work includes Deloitte and L'Oréal during her time in Germany.

In recent years, Lydia received several diversity and marketing-centered awards for her work through Blended Collective. She leads workshops and trainings, and speaks

to audiences about topics such as multicultural marketing, diversity and inclusion, entrepreneurship, and leadership.

Lydia enjoys being involved in the arts and culture community, and is a member of the Board of Trustees at the Detroit Symphony Orchestra. She holds a B.S. in Marketing from Wayne State University in Detroit and an M.B.A. in International Management from Pforzheim University in Germany. For more about Lydia, visit [blendedcollective.com](http://blendedcollective.com) and [lydiamichael.com](http://lydiamichael.com).



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## Judy Nimer Muhn

Organizational Development Specialist



When Judy joined NEW as an Organizational Development Specialist, she came with over 30 years of experience in the nonprofit sector. Having held positions on executive staff in Girl Scouting, United Way, American Red Cross, and interim CEO roles for organizations in crisis, Judy comes to NEW from years of consulting, public speaking, and providing workshops around the world. She is also highly credentialed; Judy received her Bachelor's degree from Michigan State University, and holds two Master's degrees – one in HR/Human Service Management from Boston University, and one in Counseling Psychology from University of San Francisco.

Since 2017, Judy's work at NEW has involved sharing best practices of board/staff development, fund development, strategic planning, program management and diversity, equity and inclusion with Southeast Michigan's nonprofit leaders. Judy also provides highly-valuable Executive Coaching services to our regions Executive Directors and Board Chairs.

Almost overly committed to developing our communities' next generation of leaders, Judy is a professor in the MPA-Nonprofit Management and Nonprofit Management Certificate programs at Oakland University. She also currently serves on the Board of Directors for the Baldwin Center (Pontiac), the Rotary Club of Pontiac, and The Rotary Club of Pontiac Foundation. When looking for trusted guidance, it's hard to find someone more experienced and dedicated than Judy.

## Romy Kochan

President & CEO, Gingras Global family of companies

Romy is the President & CEO of the [Gingras Global](#) family of companies. Gingras Global Inc, Gingras Global Development Inc, Gingras Global Groups, L3C, and non-profit fiscal sponsor, G1 Impact, all focus on sustainability and standards for social enterprise and impact investing. Gingras Global is based in Michigan serving a local and global clientele.

The Gingras Global team has consistently supported the development of strong social enterprise and impact investing reporting and standards. They have successfully designed, launched, and now administer several impact investing funds; administer impact investing transactions. In addition to funds, the Gingras team, under Romy's leadership, have supported more than 100 transactions to local social enterprises and gained notoriety for their templated reporting for private local social impact investing.

Romy is a [published author](#) on impact investing for social enterprise and frequent guest speaker. Articles can be found in the [Gingras Global Magazine](#). Romy is also the host of the popular podcast show [Bonfires of Social Enterprise](#), followed in more than 100 countries.

Prior to the 2011 Gingras Global launch, Romy spent 23 years in the financial industry of public investing. She has a strong expertise in investment and financial planning methodologies.

Romy obtained a Finance degree from Northern Michigan University in 1990. She then went on to obtain a CLU designation from the American College, and a Certified Financial Planning designation from the College of Financial Planning. Romy lives in southeast Michigan with her husband, Chris Kochan. She is greatly inspired by her two adult sons, Connor and Jentzen, and two wonderful grandchildren.



# Andrew J. Goldberg

Attorney and CPA

High-growth companies come to me for one thing: They want to be confident and clear in the decisions they make and the direction they are heading as they face new challenges.

Most people think of their lawyer as someone who says “No” and prevents them from growing their business. Not me. My job is to find a way to say “Yes” and help business develop strategies to grow and face the challenges ahead.

But I’m not just your lawyer, I’m a voracious consumer of all things business. I stay on top of business management and leadership philosophies, HR trends, sales and marketing strategies, mergers and acquisitions reports, and more. And I learn all this from books I’m reading and podcasts I’m listening to (ask me for suggestions), conversation with my network of experts, and my favorite resource, the Harvard Business Review.

It’s quite simple for me: I love working with entrepreneurs and learning everything about business.

And if you want to know something unique about me: I love all things neuroscience, mental-models, how human biases affect how we learn and make decisions, and my guilty pleasure, power-washing.

I’ve been told my approach to practicing law is unique (when you meet me, you’ll find out). I’ll guide you in thinking and viewing situations from new and different perspectives. And I’ll do it with Passion. With Energy. With Knowledge. And With Experience.

I’m frequently involved in matters where legal, accounting and business issues intersect. I regularly counsel clients on business formations and corporate transactions, business continuity planning, operations and management of businesses, the accumulation and preservation of wealth for business owners, taxation, and contract matters.

I earned a B.S. in Accounting from Indiana University, and a J.D. from the University of Michigan. I’m also a Certified Public Accountant.

