

PP#9: HOW WE'RE MAKING A DIFFERENCE AS WE HELP OUR CLIENTS REOPEN THEIR BUSINESS

WHAT CAN WE DO?

A. STRATEGIES FOR RE-OPENING IN GENERAL



1

Observe States Reopening And Their Protective Measures

- A. Prepare Businesses To Open In Phases
- B. Consider Policies And Procedures For Disinfecting All Work Areas
- C. Use A Misting Disinfectant To Catch Airborne Particles
- D. Create Natural Social Distances In Cubicles
- E. Require Use Of Masks And Gloves



2

Understand How Congress Is Proposing To Help Businesses Survive

- A. Working With SBA To Redefine Guidelines
- B. Redefining Forgiveness Requirements
- C. Address Expenses Related To The Timetable For Re-Hiring People
- D. Extend The Eight Week Term

B. WHAT'S OUR ROLE AT TRUSTED CFO SOLUTIONS?

- 1. To Fit In And Help Our Current Clients
- 2. Help Clients We Attract As We Deal With Circumstances Of Reopening
- 3. Operate In Compliance
- 4. Operate Practically to Keep Employees, Workers, and Products
- 5. Use Common Sense Ways To Keep Workers and Customers Safe



C. WE MAKE A DIFFERENCE FOR OUR CLIENTS BY

- 1. Helping Our Clients Survive, And Re-Invent A New Business Model
- 2. Helping Clients Gain Access To The PPP Loans
- 3. Working On Seven D Loans
- 4. Consulting To Assist Filing For Bankruptcy And Reorganization
- 5. Consulting To Help Them Leverage Banking Relationships



A

Serve As An Advisor

- i. **Adapt** To The Cycle Of Changing Markets
- ii. Offer **Tools** to With Real-Time Access
- iii. The Process Of Government And Lender **Funding**
- iv. **What-If Planning**
- v. Identify **New Opportunities** Around Their Industry



B

We Partner As A Coach

- i. We **Plan, Encourage, And Stay Positive**
- ii. Economic Consequence With Much Bigger Emotional Danger
- iii. When The Future Is In Doubt, Fear Leads People to Make Bad Decisions
- iv. Let Our Value To Clients Shine



C

We Are Invited To Work As An Extended Member Of Management

- i. **Create** Action Plans
- ii. **Implement** These Action Plans
- iii. **Accountability** and **Reporting** On Completing Plans



D

We Coordinate And Collaborate With Team Members

- i. Extraordinary Levels Of **Expertise** And **Experience** Around The Country
- ii. Access to **Measurement And Planning Tools**
- iii. Help Clients **Chart Where They And Competitors Stand**

No One Should Ever Write A Net Check For The Use Of Our Services As An Element Of Overhead.



F. Questions To Ask Our Selves As We Work With Clients

- 1. Am I **Justifying** Trusted CFO Solutions Being Here?
- 2. What Am I Doing To **Improve Their Profits**, Lower Their **Costs**, Increase Their **Market Share**, And **Add To Revenue**?
- 3. What Am I Doing That **Makes A Difference** That I Can **Demonstrate, Measure, And Show**?

Your Job Is To Help Them Help All Of Us Figure Out How To Make That Client More Profitable Than They Would Have Been Without Us.



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