

**Regional Business
Partner Network**



**Management Capability
Development Voucher Fund
Handbook for Service Providers.**

November 2017.

Welcome

New Zealand Trade and Enterprise (NZTE) funds the Management Capability Voucher Fund (Voucher Fund) which is administered by the Regional Business Partner Network (RBPN).

The purpose of the voucher fund is to,

- (a) Educate business owners in managers on the value and benefit of investing in their own capability building and becoming more familiar with the benefits of training, and seeking out relevant Providers
- (b) Provide an open market where private providers of management training services (Service Providers) and their services can be found by businesses;

This Handbook provides information on the Regional Business Partner Network, the Management Capability Voucher Fund and the role you play as a Service Provider.

Regional Business Partner Network

The Regional Business Partner Network (RBPN) is a business support service jointly funded by NZTE and Callaghan Innovation. The network is made up of multiple organisations nationwide who are contracted by NZTE and Callaghan Innovation to employ Growth Advisors.

The role of the **Growth Advisor** is to work with business owners and key managers (Customers) who are looking to grow their business but need some support in identifying how to go about it.

The Growth Advisors do this by following these steps:

1. Undertaking a discover session with the Customer to understand the business
2. Providing an action plan to help Customers identify and prioritise their next steps
3. Following up with Customers on progress on actions then reviewing possible next steps

The Growth Advisors add value to their Customers by providing trusted, unbiased and conflicted support.

The Growth Advisors have access to a variety of tools to help support their Customers, which include the Management Capability Voucher Fund.

To find out more about the **Management Capability Voucher Fund**, read on!

To find out more about the other tools available contact one of the Regional Business Partner Growth Advisors listed here <https://www.regionalbusinesspartners.co.nz/#contact>

Management Capability Voucher Fund

Administered by the RBP, the Management Capability Voucher Fund (Voucher Fund) is available to RBP Customers who have been through a Discover Session with a RBP Growth Advisor and have had management capability areas identified as a barrier to the growth of the business **AND** the business meets the following eligibility criteria,

- be operating with 50 or fewer FTEs
- be GST registered in New Zealand
- be operating in a commercial environment – i.e. currently trading
- be privately owned or a Maori Trust or Incorporation under the Te Ture Whenua Maori Act 1993 or similar organisation managing Maori assets under multiple ownership
- have undergone Discovery Session with a Regional Business Partner Growth Advisor

Business should also:

- have the potential and desire to grow
- demonstrate commitment to improving management capability: indicators of commitment include seeking advice, working through the assessment process, and a willingness to co-fund and commit time to capability-building activities
- have an identified gap in its capability that can be addressed through management capability building and training.

The Voucher Process

1. Growth Advisors issue online vouchers to eligible businesses based on the needs identified during the Discover Session, and level of growth potential and contribution to the local economy.

Each voucher is issued within the www.regionalbusinesspartners.co.nz website and can only be booked against **one** training event within the MarketPlace (<https://app.regionalbusinesspartners.co.nz/Marketplace>).

If there are multiple training needs then the Customer may receive multiple vouchers to give them the flexibility to use different service providers..

Note: If more than one individual from the business is attending the same course or workshop, one voucher can cover all attendees.

2. Customer Identifies the service/s they want to use and has a discussion with the Service Provider
3. Service Provider sets up an event under the relevant service in the “MarketPlace” and provides the Customer with the “Event Reference”
4. Customer then uses the “Event Reference” to search for the event and books on the event.

Once Training has been delivered to the Customer the Service Provider can make a claim on the RBP Website and then issue an invoice to NZTE.

For further details on the processes and website functionality please read the “Guide to RBP Website for Service Providers.”

Voucher Value

- The Growth Advisors decide the value of the vouchers based on the needs identified during the Discovery Session.
- Vouchers can be used to cover up to 50% of the training costs (excluding travel and disbursements), capped at \$5000+ GST per annum.
- The Voucher issued amount will reduce to 50% of the “Event Price” as stated in the “MarketPlace” if this is less than the original value issued.

Example:

A voucher is issued to a customer for \$1500.00 +GST.

1. If the Customer chooses to attend a service where the “Event Price” is \$2,000+GST, the voucher will automatically reduce to \$1000 +GST. The balance of the funding is returned to the Growth Advisor.
2. If the Customer chooses to attend a service where the “Event Price” is \$3,000.00 +GST, there will be no change to the Voucher Value

Expiry Dates

Vouchers have “Booking expiry” of 30 days from the issue date. Customers must have booked their vouchers onto events within this timeframe.

Once a Voucher is used to book on to an event you will have up to 12 months from the date the voucher was issued to complete the service delivery

Fraudulent use of vouchers

If a Service Provider is found to be acting fraudulently, they will have their contracts cancelled. Fraudulent behaviour includes:

- delivering services that are not registered under the pretence of a registered service;
- claiming for services delivered that were not delivered;
- claiming for services where the attendee did not attend.

Service Provider Responsibilities

Please refer to your signed Service Provider Expression of Interest Form/ Registration Form which details your responsibilities and the terms and conditions you agree to as a Registered Service provider.

This can be found by logging in to the RBP website, we also recommend you download and keep a copy on file.

COMMUNICATIONS GUIDELINES

It is important that you clearly indicate which of your services are registered for the Management Capability Voucher Fund.

The following are some guidelines around terminology.

Advertising a registered service

When promoting individual registered services. The following text should be used:

“This Workshop / Course / Coaching is registered with the Management Capability Development Voucher Fund. Find out more by visiting www.regionalbusinesspartners.co.nz”

Advertising about your organisation

If you are planning to advertise that your organisation delivers services that have been registered with the Management Capability Development Voucher Fund the following tag lines can be used,

“[Registered organisation name] offers services that are registered with the Management Capability Development Voucher Fund”

If you wish to use other wording please contact NZTE at trainingproviders@nzte.govt.nz to check the wording is ok.

News Letters / Other publications

If you wish to refer to the Voucher Scheme in a newsletter or publication, the following approved text may be used:

Management Capability Development Voucher Fund

Optional Introduction: Small businesses may qualify for vouchers to help pay for services such as training workshops, courses and coaching that build the management capabilities of their owners and key managers.

Management Capability Development Vouchers are only available through the Regional Business Partner Network (RBP) Growth Advisors.

Vouchers may be provided to a business where the Growth Advisors have identified a need for management training as part of an action plan to support the business owner to grow and innovate their business.

For more information on the Management Capability Development Voucher Fund or to find your local Growth Advisor go to www.regionalbusinesspartners.co.nz

Additional

- As per the Promotion and Advertising terms in the contract, the service provider does not have rights to use the NZTE logo.
- Always ensure you manage the expectations of a potential customer in regards to whether or not they might receive voucher funding. The funding is limited and the Growth Advisors make decisions based on their own meetings with the business owner.
- Under no circumstances should you use words such as Approved / Accredited / Authorised or Endorsed

SERVICE ELIGIBILITY

Services that are Eligible for registration are training services that are delivered to Business Owners and / or managers that will improve the management capability with in the business. Vouchers may be provided to business owners to enable them to access eligible services that can fulfil a management skill gap identified by the RBP Growth Advisor.

Service types that are NOT eligible for the voucher funding are:

- Consultancy Services (where work is being undertaken by the provider)
- Conferences and Seminars
- Staff and Industry Training. (Vocational or Technical)
- Services offered outside New Zealand.
- Services already subsidised through other Government Funding

Services covering the following subjects may qualify for the Voucher Funding.

<p>MARKETING STRATEGIES</p> <ul style="list-style-type: none"> Marketing planning Market research Competitive advantage Market targeting/segmentation Promotion/lead generation techniques Sales strategies Branding Client management Pricing for market Consumer rights E-commerce 	<p>BUSINESS PLANNING</p> <ul style="list-style-type: none"> Goals Vision/Mission Growth strategies SWOT analysis Competitive advantage/opportunity Targets Operational and action plans
<p>BUSINESS SYSTEMS</p> <ul style="list-style-type: none"> Information and financial systems Record keeping Organisational efficiency Operational systems and procedures E-commerce Benchmarking Distribution 	<p>CAPITAL RAISING</p> <ul style="list-style-type: none"> Introduction to Capital Raising Getting Business Investor Ready Pitching to Potential Investors Completing the Deal <p>FINANCE</p> <ul style="list-style-type: none"> Financial reports & ratios Costing and pricing Budgeting and cash flow planning Taxation Credit/debt management
<p>BUSINESS SUSTAINABILITY</p> <ul style="list-style-type: none"> What is sustainability? Factors in creating a sustainable business Understanding the implications of your business choices Benefits of sustainability Customer expectations Financial cost-benefits Reduction strategies Procurement selection Business culture 	<p>MANAGING RESOURCES</p> <ul style="list-style-type: none"> HR planning Recruitment Motivation Leadership/managing people Performance appraisals Conflict resolution Employment compliance Health and safety Time management Intellectual Property protection Leveraging stakeholders/relationships Business excellence Benchmarking Business resource planning E-commerce Project management
<p>GOVERNANCE</p> <ul style="list-style-type: none"> Obligation under the Companies Act Roles and Responsibilities Governance Documents Legal Structure 	<p>EXPORT</p> <ul style="list-style-type: none"> Are you ready for exporting?
<p>LEAN MANUFACTURING / BUSINESS OPERATIONS</p>	

<p>Introduction to lean manufacturing Principles Benefits and pitfalls of lean manufacturing Lean manufacturing process Lean tools and methods Measurement Implementation of lean Supporting systems and activities for lean</p>	<p>Getting started in exporting Planning for export success Market entry strategies Market research International sales and negotiation Exporting online Tender and proposal writing Trade fairs</p>
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Eligible Training Topics - Topic definition

BUSINESS PLANNING

- **Goals** - goal setting, planning personal growth and business development.
- **Vision/Mission**
- **Growth Strategies and Strategic Planning**
- **SWOT Analysis**
- **Competitive Advantage/Opportunity** - competitor analysis, identifying key selling proposition and competitive advantage.
- **Targets** - setting realistic and measurable targets, ratios and benchmarking.
- **Action/Operational Plans** - developing action plans (human resources, marketing, production, finance, innovation plans) to achieve targets.

MARKETING STRATEGIES

- **Marketing Planning** - developing a marketing plan, setting marketing budgets, measuring results.
- **Market Research and Planning** - benefits and methods of market research, analysis of results, product/service development and innovation.
- **Competitive Advantage** - identifying, developing, leveraging and sustaining competitive advantage.
- **Market Targeting/Segmentation** - selection of target markets, customer profiling, developing specific marketing tactics for target markets.
- **Promotion/Lead Generation Techniques** - Promotional planning, setting promotional budgets, promotional strategies include personal selling, direct mail, email, website promotions, publicity, public relations, sales promotions, word-of-mouth, advertising etc.
- **Sales Strategies** - selling skills and techniques.
- **Branding** - developing and maintaining a strong brand, using branding to add value to a business.
- **Client Management** - Creating, maintaining and enhancing strong relationships with customers and other stakeholders.
- **Pricing for Market** - pricing strategies, discussion of external factors that impact on pricing decisions e.g. the nature of the market, demand, competition, and other environmental considerations.
- **Consumer Rights** - relevant legislation e.g. The Fair Trading Act, The Consumer Guarantees Act, Standards.
- **E-commerce** - e-marketing, strategic use of websites, the Internet and other technology as marketing tools e.g. better communications, improved market research, lower costs and greater customer convenience.

FINANCE

- **Financial Reports and Ratios** - layman's understanding of financial reports (i.e. balance sheet, profit and loss) and ratios to facilitate decision making and understanding of the key drivers of profitability.

- **Costing and Pricing** - understanding fixed and variable costs, how to calculate product or service costings, understanding and calculating breakeven, determining the most profitable areas, setting prices.
- **Budgeting and Cash Flow Planning** - preparing budgets and cash flow forecasts, setting and managing financial targets.
- **Taxation** - types of tax e.g. Provisional and Terminal, GST, PAYE, and FBT; basis of calculation and payment. Reviewing business structure to minimise tax obligations.
- **Credit/Debt Management** - management of debtors and creditors to maintain liquidity, tips for debt collection. This topic needs to draw attention to the need to monitor, encourage good habits of chasing debts and longer term planning and matching of cash needs with cash resources.

BUSINESS SYSTEMS

- **Information and Financial Systems** - increasing organisational efficiency, identifying information types, databases, financial systems, storage media, tracking data through processes, managing data, tracking manual and electronic information flows, flow analysis and re-engineering.
- **Record Keeping** - processes and procedures for organising, processing and storing business related data relevant to an organisation.
- **Organisational Efficiency** - setting up efficient office systems, reducing businesses costs through effective business systems, improving workflow, information technology.
- **Operational Systems and Procedures** - identifying, setting up and documenting organisation procedures, retaining "in head" procedures when key staff exit the organisation.
- **E-commerce** - on-line trading, e-business applications, b-2-b/b-2-c commerce, integration of backroom systems with front-end.
- **Benchmarking** - the systematic and continuous process of identifying, learning and adapting best practices from national and international businesses in the same industry in order to help a business improve its business performance.
- **Distribution** - best ways to store, handle and move products and services so that they are available to customers at the right time and in the right place.

MANAGING RESOURCES

- **HR Planning** - identifying the human resource requirements e.g. organisational design, capacity and staff contingency, skill planning, current staff skill sets, future staffing needs and recruitment and succession planning.
- **Recruitment** - job analysis to determine type of person and skill level required; methods of recruitment; interviewing techniques; selection testing; reference and background checking; induction programmes and early review for new recruits; employment law relating to recruitment.
- **Motivation** - how different people are motivated, systems for dealing with those differences, co-ordination of performance measurement and motivation levels, how business culture can impact on productivity and staff morale and what can be done to influence this.
- **Leadership/Managing People** - attributes of good leaders, effective communication, directing, coaching, supporting and delegating to improve the performance of the business.
- **Performance appraisals** - systems to measure competency, provide feedback to staff/management, have performance improvement as an outcome, reward performance, facilitate career development and focus the employees on those tasks which are strategically important to the business.
- **Conflict Resolution** - tools and techniques to identify and manage conflict in the workplace.
- **Employment Compliance** - employer obligations when employing people, including PAYE (registration, making payments, completing forms), ACC (registration, earner premium, employee premium, and residual levy), the Human Rights Act and the Employment Relations Act.
- **Health and Safety** - creating a healthy and safe working environment, including discussion of the Health and Safety in Employment Act, creating and implementing a health and safety plan.
- **Time Management** - a framework for delegation, short-term goal setting and prioritising work.

- Intellectual Property Protection - Understanding what intellectual property is, what can be legally protected (copyright, trademarks, patents, registered designs, licenses), how to go about it and costs, non-legal forms of intellectual property protection and formulating your intellectual property strategy.
- **Leveraging Stakeholders/Relationships** - recognising key stakeholders (customer; supplier; community; industry); understanding the relationship that exists with each and how that relationship can be strategically leveraged to create win-win partnerships.
- **Business Excellence** - strategy for producing goods or services which meet or exceed the required standards of quality, timing, quantity, consistency and cost, relative to market expectations.
- **Business Resource Planning** - capacity planning, production scheduling, equipment requirements, plant layout, material requirements and suppliers, inventory control and quality control requirements.
- **E-commerce** - harnessing e-commerce tools to build on and/or maintain the sustainable competitive advantage of your business. Understand the different types of e-commerce, the benefits to be achieved using e-commerce and the costs involved.

GOVERNANCE

- **Obligations under the Companies Act**
- **Roles and Responsibilities**– for Directors, Board Members, Trustees
- **Governance Documents**
- **Legal Structure**

EXPORTING

- **Are you Ready for Exporting?** - why export, overview of the practical side to exporting: freight, finance, pricing, foreign exchange, documentation, terms of sale; an overview of the strategic side: research, marketing, promotion and market entry strategies.
- **Getting Started in Exporting** - the export process, strategic market selection and research, freight, finance and documentation, determining the best market entry strategy, selecting the right business partner, intellectual property and branding, pricing for export, developing promotional tactics, e-marketing, making the sales pitch, and export planning.
- **Planning for Export Success** - strategic market selection, market research, intellectual property protection, pricing and marketing.
- **Market Entry Strategies** - market entry options: direct marketing, distributors and agents, strategic alliances, joint venture partners, contract manufacture, sale of technology, licensing, franchising, setting up an overseas office, and overlapping models. How to build effective relationships with offshore partners, choosing the right partner, achieving a win/win relationship, agreements and contracts, and measuring your partner's performance.
- **Market Research** - how to develop a brief and framework to undertake market research, reliable and informative sources of information and resources, using research information as part of your export marketing plan.
- **International Sales and Negotiation** - understanding the sales process and buyer motives, developing your sales pitch and point of difference, presenting a strong business case, effective presentation techniques, handling objections, sharpening negotiation skills, closing the deal.
- **Exporting Online** - The reasons for exporting online, defining your target audience/customer, developing an internet strategy, the components of an effective website, key internationalisation issues including tariffs, language and getting paid, marketing your website and system security.
- **Tender and Proposal Writing** - developing tactics for smart tender selection, where to find tender/proposal opportunities, understanding the purchasing process, writing powerful proposals, developing strategies to put the bid with strategic partners, review process to learn from previous tenders.
- **Trade Fairs** - integrating trade fairs into your promotional mix, setting specific objectives, knowing your target market, getting on your target market's "must see list", handling booth traffic, effective lead gathering and follow up.

BUSINESS SUSTAINABILITY

- **What is Sustainability?** - Economic, social and environmental sustainability.
- **Factors in Creating a Sustainable Business** - Making sustainability part of your vision. Leader's commitment to sustainability. Choice and use of resources that ensure the most effective use of resources. Business systems and processes that support the most efficient and effective use of key resources. Consideration of external accreditation to verify business practices and operations.
- **Understanding the Implications of your Business Choices** - Sustainability is incorporated into the design of products or services, their manufacture or delivery, and the business takes responsibility for the whole of the life cycle.
- **Benefits of Sustainability** - cost savings, competitive edge, brand/marketing benefits, environmental, social/community.
- **Customer Expectations** - understanding customer expectations, emerging niches, trends, leveraging your sustainability, accreditation programmes.
- **Financial Cost-Benefits** - analysing the financial impact of sustainability.
- **Reduction Strategies** - waste reduction, reducing or switching resources, cost of waste vs. cost of disposal, reuse and/or recycling,
- **Procurement selection** - supplier sustainability practices and credentials and raw material sustainability.
- **Business culture** - people and communities are invested in and staff behaviours reinforcing sustainability are supported. Regular communication and feedback on progress towards sustainability.

LEAN MANUFACTURING / BUSINESS OPERATIONS

- **Introduction to Lean Manufacturing Principles** - the systematic approach to eliminating waste from processes so that every part of the process adds value to the customer. Identification of activities or work that are: value adding, non value adding, waste.
- **Benefits and Pitfalls of Lean Manufacturing**
- **Lean Manufacturing Process** - specify value, identify value stream and eliminate waste, create flow, create pull (produce only what is needed when requested), aim for perfection.
- **Lean Tools and Methods** - including: value stream mapping, continuous improvement, pull (kanban), flow, total productive maintenance, quality at source, points of use, quick changeover (SMED), standardised work, batch reduction, teams, 5S, visual management, plant layout, poka-yoke.
- **Measurement** - define lean measures, measure, analyse, improve, control.
- **Implementation of Lean** - determining the scope, project management structure, responsibilities and accountabilities, integrating and aligning the teams, documentation, communication.
- **Supporting Systems and Activities for Lean**

CAPITAL RAISING

- **Introduction to Capital Raising** – provides an overview of the capital raising process, the types and sources of finance, how investors work and what they are looking for, determining if a business is investment ready, sources of assistance.
- **Getting Companies Investor Ready** – preparing the business case, valuing a business, legal implications of raising funds, Securities Act and exemptions.
- **Pitching to Potential Investors** – finding an investor, the deal process and timetable, information investors will require, the importance of the pitch, tools for creating succinct pitches.
- **Completing the Deal** - due diligence, the negotiation process, key legal agreements.