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From Pitfalls to Progress:

5 Ways to Elevate Your TA For Small Business Impact

Presented by Revby



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PITFALL 1

Proceed Without Building Trust

The foundation of successful technical assistance programs starts with establishing genuine trust and credibility within the community.



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Common Barriers & Consequences

Common Barriers to Trust:

- **Low trust in government**

Historical experiences create skepticism toward government-sponsored programs

- **Scam abundance**

Predatory services make businesses wary of unsolicited assistance offers

- **Lack of community relationships**

Outsider providers struggle to connect with local business culture

Consequences When Trust is Not Built:

Program underutilization

Low participation rates despite community need

Missed KPI's

Failure to meet program success metrics

Risk of future funding

Poor outcomes jeopardize program continuation

Miss businesses that need support the most

Vulnerable enterprises remain underserved



A Story from Our Work with the City of Chelsea

1

Established credibility by working with a local leader

A respected community figure who could vouch for our legitimacy and intentions

2

Made cultural matches with relatable team members

Assigned culturally competent staff who could communicate effectively

3

Anchor businesses to act as champions

Identified businesses to serve as advocates for the program

4

Prioritized phone calls over emails for warmer engagement

Personal, direct communication methods to build stronger relationships

Embed Trust-Building Practices in Your TA Program Design

Choose Partners Wisely

Select TA providers who demonstrate empathy and relationship building skills, not just technical expertise.

Differentiate from Predatory Services

Clearly distinguish your TA services from predatory lending and scams.

Know the Community Context

Research history and cultural nuances. Collaborate with local, trusted ecosystem partners for cultural & language alignment.

Create Clarity on Mutual Ownership

Set clear expectations at the start and invite buy-in. Ensure they know their role, as an equal in the relationship.

Lead with Openness & Empathy

Share your own story to humanize interactions and create genuine connections with business owners.

Respect Their Journey

Understand that their business is personal. Share tough truths with honesty and compassion. Focus on their journey, not just program KPIs.

PITFALL 2

No Shared Playbook When a TA Engagement Goes Sideways

Without clear protocols for handling challenging situations, TA programs risk escalating conflicts and damaging relationships.



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Implications



Time Drain

Unresolved conflicts consume valuable resources and staff time



Trust Erosion

Poor conflict handling damages relationships with business owners



Burnout

Staff become overwhelmed dealing with difficult situations



Skewed Outcomes

Program metrics suffer when engagements fail to reach resolution



Reality: Tough cases are inevitable. An intentional response influences positive outcome.

Common Conflict Triggers & What Happens Next

Common triggers we see:

- Expectation mismatch
- Readiness & capacity
- Scope creep / pace
- Communication friction
- Fit mismatch



Two Paths We've Experienced (And Learned From)

Not Ideal

- — Take complaint at face value
- — Demand immediate provider compliance
- — No joint huddle or communication between TA provider and Agency
- — No reset of goals/scope

Good Practice

- — Reframe: "What outcome are we missing?"
- — Diagnose: expectations • scope • readiness • timing • fit
- — Reset: clear goals, milestones, cadence, roles
- — Choose: pivot track or graceful off-ramp

How Do You Approach? A Matter of Escalation vs. De-Escalation

PIVOT: From Problem to Progress



P — Pause & Pattern-check

Don't react; convene triage (agency + provider).



I — Investigate Root Cause

Expectations? Scope? Readiness? Timing? Fit?



V — Validate Perspectives

Owner, provider, agency—name what each needs.



O — Options & Off-ramp

Reset plan *or* refer out—both are success paths.



T — Track & Teach-forward

Document case, update playbook, tune marketing & intake.





PITFALL 3

Provide Capital without Guidance

Capital alone is insufficient for sustainable business growth.
Without proper guidance, funding can lead to poor decisions and wasted resources.



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Capital Alone Doesn't Build Capacity



Capital is the beginning, not the end

Funding provides opportunity, but success requires ongoing support and strategic thinking



A business owner needs a thought partner

Strategic guidance helps entrepreneurs make informed decisions about their investments



Skills gaps prevent entrepreneurs from thriving

Many business owners lack the knowledge to effectively utilize capital for growth



Day to day operations don't stop for:

- Financial analysis
- Market research
- Strategic planning
- Technology implementation



Adding TA to Capital Mitigates Risk – For You AND Entrepreneurs You Serve

Capital Only Scenario

Short term fixes

Quick solutions that don't address underlying issues

Cash flow deficits

Money runs out without sustainable revenue improvements

One off purchases

Equipment or inventory bought without strategic planning

Capital + TA Scenario

Purchases focused on sustainability

Investments aligned with long-term business viability

Alignment with strategy and growth and budgets

Every dollar spent supports overall business objectives

Purchases implemented, not just bought

Proper integration and utilization of new assets

Skills developed

Business owners gain capabilities for future decision-making



How to Decide What TA to Offer with an Access to Capital Program

1 — Application Phase

Key Question: Which businesses in our community might be excluded without TA?

Identify barriers that prevent certain entrepreneurs from accessing capital and design supportive interventions.

2 — Disbursement Phase

Key Question: What knowledge gaps could TA close so that capital creates long-term returns?

Assess specific skills needed to maximize the impact of funding received.

3 — Balance Assessment

Key Question: How can TA help us balance accessibility (getting capital into hands quickly) with sustainability (ensuring it drives growth)?

Create efficient processes that don't sacrifice effectiveness for speed.



PITFALL 4

Deliver Subject Matter TA in a One-Size-Fits-All Approach

"Textbook" technical assistance fails to meet the unique needs of individual businesses and their specific contexts and capacities.



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"Standard" Content Doesn't Work



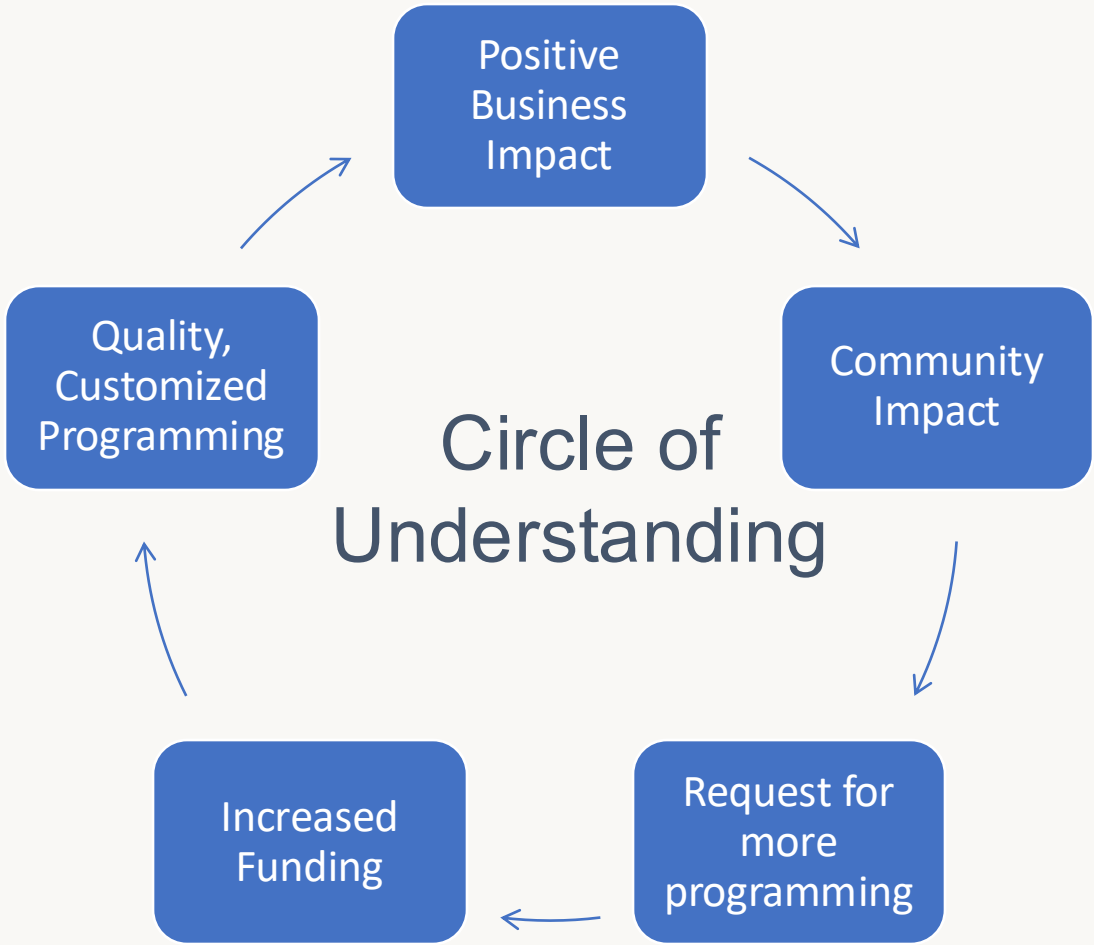
Understanding leads to action

Understanding requires:

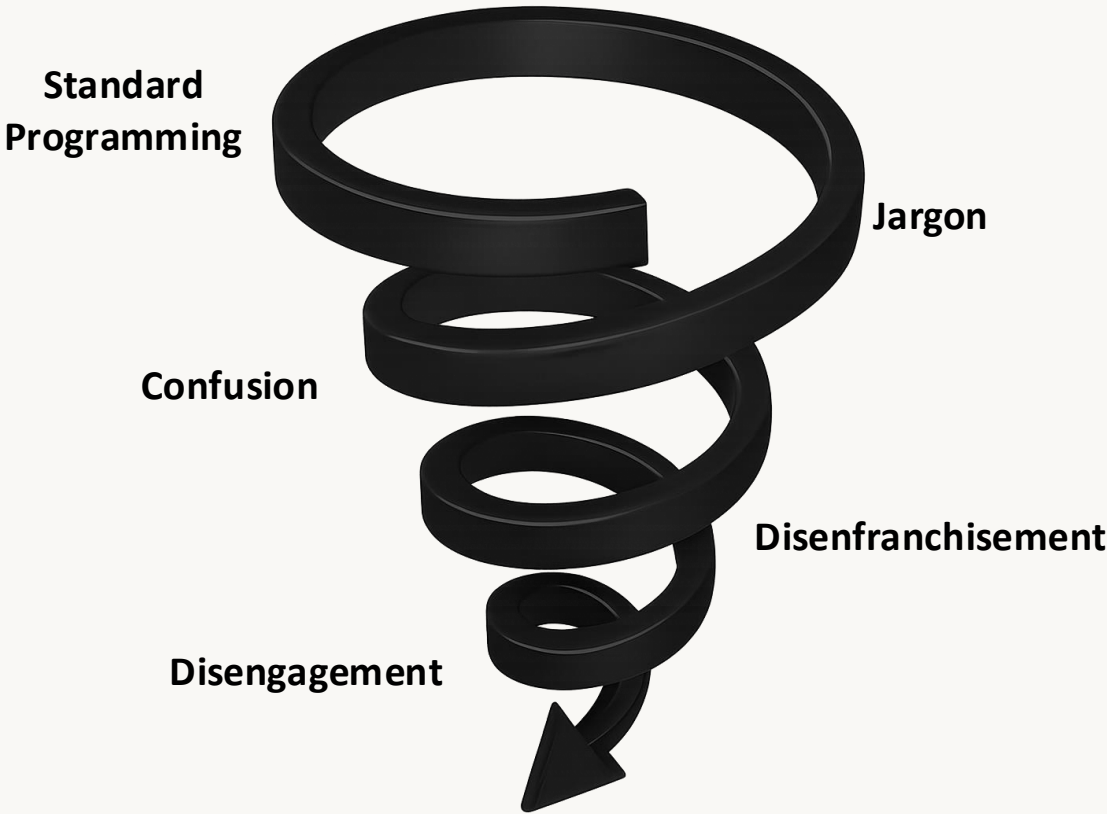
- Right level
- Right subject
- Right language
- Right timing

👍 **Key Insight:** Concepts inform, but implementation transforms.

Create a Positive Cycle



Spiral of Despair



The difference between success and failure often lies in the approach to program delivery.

Customized programming creates a virtuous cycle of engagement and impact, while standardized approaches lead to disengagement and wasted resources.

Accountability for Custom Programming

01

Scheduled Check-in with Business Owners

Regular touchpoints to assess progress and gather feedback on program effectiveness

02

Review TA Provider Material

Evaluate content quality and relevance to ensure it meets business owner needs

03

Ask for Business Owner Feedback

Actively solicit input on program value and areas for improvement

04

Continue Positive Relationships with TA Providers

Maintain strong partnerships while holding providers accountable for results

🤔 **Mindset Shift:** Success = Not "Did they learn?" but "Can they do it in their business tomorrow?"

PITFALL 5





Not Being Agile with TA
Delivery Format When Change
May Be Necessary



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Flexibility in TA Delivery Formats

-  **One-on-One**
Personalized attention for specific business challenges and customized solutions
-  **Cohort-Based Group Training**
Peer learning and networking opportunities with structured curriculum
-  **Workshops**
Interactive learning sessions for skill-building and knowledge sharing
-  **Deliverables-Focused Engagements**
Specific outputs and tangible results for business improvement



⊗ **The Risk:** Sticking with a single format, even when it no longer serves the entrepreneurs or the program goals.

Case Study in Listening, Adapting, and Moving Forward: Revby + New Mexico EDD (SSBCI Program)

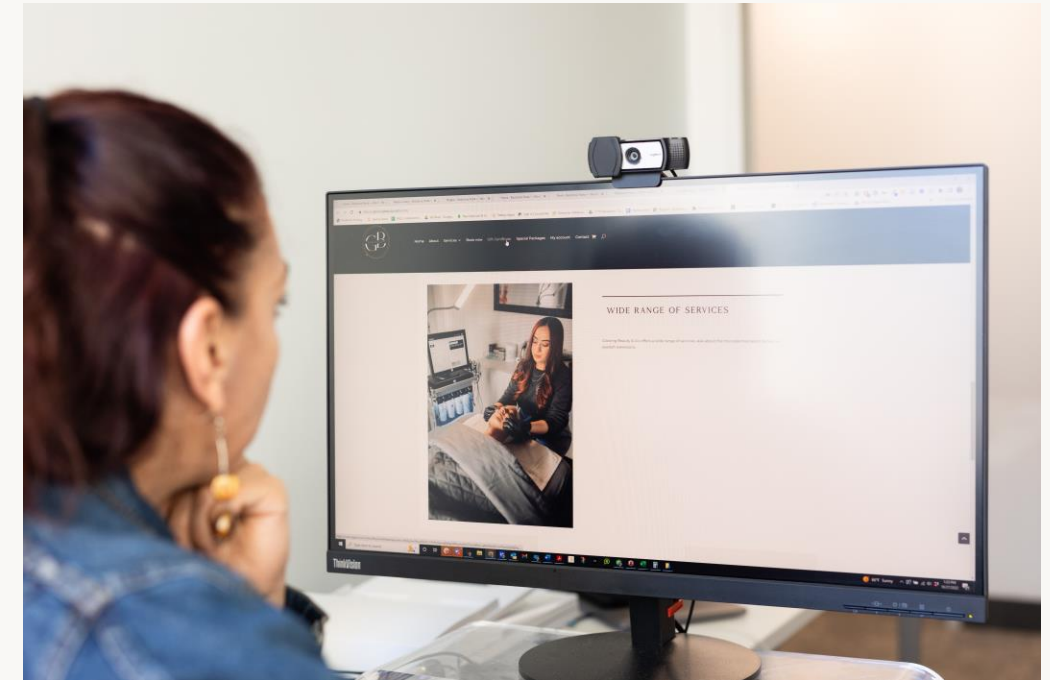
How it Started (2024–2025):

- 12 workshops (mix of in-person and virtual) with light one-on-one TA
- **Focus:** broad outreach, initial skill building
- **Challenge:** Many business owners needed more than a one-time workshop to achieve tangible results.

New Design (2026):

- Cohort-based model: Kick-off event + virtual workshops
- Heavy emphasis on one-on-one TA for each participant
- **Goal:** tangible progress toward gaining capital

Key Takeaway: Agility in TA delivery is essential. By adapting formats, providers can maximize both reach *and* results—meeting entrepreneurs where they are and helping them move forward.



Questions?

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