



## **Financial Systems**

When you can't do it all, your Systems are there to help.

### **Evergreen Seminar Series with One-on-One Strategy Sessions**

If you're ready to tackle your financial systems and get your business running smoothly, join Evergreen and Skopos Collective for a new, five-class series all about Financial Systems Thinking! We'll use real business examples, frameworks, and exercises to break down and document operational workflows, explore solutions to challenges you're facing, develop personal Standard Operating Procedures and other critical tools to support daily operations, and more. You'll develop the confidence to address the pain points that affect your operations and, ultimately, your profitability. You will also have dedicated time to work directly on updating your financial systems, and then share it with your peers in-class so you'll be ready to bring it to your team for implementation.

This educational opportunity is coupled with three private, one-on-one strategy sessions with Skopos Collective to apply the class concepts to your business. This is an opportunity to talk through your questions and receive tailored answers in a private and confidential setting and get assistance applying the class concepts re: Financial Systems to your unique business model.

#### **What to expect:**

This five-class program with one-on-one strategy sessions will meet in a hybrid format - two classes online via Zoom and three in-person at the Evergreen offices: 2 Kingsland Ave. Brooklyn, NY 11211. All classes will take place Thursdays from 9:30am to 12:30pm starting on Thursday May 9th as per the schedule below.

In addition, participants will have three hours of one-on-one strategy session time to work through the class materials, discuss specific questions, and receive tailored answers in a private setting with Skopos Collective. These sessions will take place over Zoom during the timeframes outlined below. Participants will have the opportunity to sign up for their specific session times after being accepted to the course.

In addition, students should expect to spend one to two hours per week, outside of class, working on additional homework/review and their final Financial Systems presentations.

## **Class Schedule:**

Classes take place from 9:30 am to 12:30 pm on the following Thursdays:

1. May 9, 2024 - In Person
2. May 16, 2024 - In-Person
3. May 23, 2024 - Zoom \*please note we are skipping one week between 5/23 and 6/6
4. June 6, 2024 - Zoom
5. June 13, 2024 - In Person

In-person classes will take place at the Evergreen offices: 2 Kingsland Ave Brooklyn NY 11211.

## **One-on-one Strategy Session Schedule:**

- After Class 1 (May 10-15): 60 minute meeting after Class 1 to review participant's Mindmap and offer feedback as well as ways to polish.
- After Class 2 (May 17 - 22): 60 minute meeting after Class 2 to review participant's Financial System desired Outputs and necessary Inputs.
- After Class 3 (May 24 - June 5): 60 minute meeting after Class 3 to review participant's Financial System, processes and tools.

All Strategy Sessions to take place via Zoom.

## **Who Should Attend**

Business owners (prioritized) or relevant staff who can make financial strategy decisions for the business should attend this seminar.

This class is right for you if...

- Your business has grown, but your financial management hasn't: you need a system that reflects where you are now and will keep up with your growth
- You need an organizational overhaul: you want to learn how to maintain accurate records and digital files, centralize key information, and have easy access to the reports you regularly review
- You want to standardize your financial management process: you need to develop SOPs, a best practices checklist, and other tools that benefit your entire team
- You are aware of the bottlenecks or challenges in your financial system: you can come to class prepared with what you want to work on, and are willing to engage with your peers for feedback

Participants must:

- Be available via Zoom and in-person (see schedule)
- Be comfortable sharing and discussing their business and work done in class with other participants
- Be able to bring your P&L (Profit & Loss Statement) to class
- Bring a laptop to class
- Present your work to your peers at the end of the series

## Financial Systems- Class and Strategy Session Descriptions

### **Class One** Class One: Why Systems? What is a Financial System?

Thursday  
May 9,  
2024  
(In-  
Person)

You can only take your business so far with organic growth. Considering how you do business and putting foundational structures in place is core to healthy financials and growing your business. While every business is different, a few key components make up a basic Financial System, and a good one optimizes a business's financial health and ability to take action. We'll warm-up by assessing our feelings toward our current system, learning the terminology, and reviewing case studies that demonstrate how different financial systems support how different businesses operate.

**Strategy Session - 60 min.** // What components go into YOUR financial system? We'll fine-tune this together so you understand what goes into your financial system and how the components work together.

### **Class Two** Class Two: What's In Your System?

Thursday  
May 16,  
2024  
(In-  
Person)

How simple or complex is your system? What are the components? One of the main reasons business owners feel so overwhelmed with managing their Financial System is that the necessary structure, inputs, and processes aren't in place. We will look to a real-world business system to see what's possible and review how systems connect to the P&L and Balance Sheet. The Financial System Mindmap exercise will help us explore how the answers you need (outputs) and how you source information (inputs) connect to your desired outcomes.

**Strategy Session - 60 min.** // In this session, we're going to reframe your Financial System Mindmap to show how your business operations (inputs) show up in your Balance Sheet and Profit & Loss Statement (outputs).

### **Class Three** Class Three: Process Drives Efficient Systems

Thursday  
May 23,  
2024  
(In-  
Person)

The first two classes gave you a good foundation of Financial System inputs and outputs. Now it's time to explore *how* those inputs are processed to give us our desired outputs. We will share tools that drive effective processes and support your Financial System, including SOPs, checklists, and workflows. Time will be set aside at the end of the class for you to begin outlining the components of your new Financial System in preparation for your Strategy Session.

**Strategy Session - 60 min.** // In this session, we will outline the specific processes and tools (e.g. checklists, SOPs, software) that will streamline and support your Financial System as a whole.

**Class Four** **Class Four: Applying Financial Systems To Your Business**

Thursday  
June 6,  
2024  
(In-  
Person)

What's working, what's not working, and where are you getting stuck? Following a Strategy Session, this class will have you focused on assessing your internal processes, identifying the pain points, examining the wide variety of tools at your disposal. Later, you'll turn to your cohort for an honest discussion about what systems work for which businesses, and what areas can be trimmed back.

**Class Five** **Class Five: Your Business System Is Ready for the Real World!**

Thursday  
June 13,  
2024  
(In-  
Person)

Your System is ready for real-world application. This class will give you an opportunity to rehearse how you'll share these improvements with your team for implementation. The best part of sharing is learning from each other!

**About the Instructor:**



**About Skopos:**

Skopos offers independent designers, modern manufacturers, and mission-driven businesses the financial clarity needed to grow. With a human approach to numbers, our goal is to uplift the small businesses that bring character to our communities by giving business owners better control of their finances, empower them with easy-to-use systems, and connect them to capital.

**About Elli Papadopoulos:**

Elli brings over 25 years of experience working with small businesses. In 2015, she founded Skopos Collective after spending seven years as an SBA loan underwriter with the Grow America Fund, a non-profit lender. What she quickly learned was that too many small business owners are in the dark about their own finances. She became frustrated with having to decline small business loan requests due to inadequate financials, lack of clear planning, and limited cash flow. Now she works with business owners to get their financial house in order, maximize profitability (without sacrificing their business values), strategize their growth, and connect them to good funding.