

# SBA Next Level CEO

Bringing your business to the next level of growth, efficiency, and profitability



U.S. Small Business Administration

## **Module 1: 9:00am – 11:00am on March 26, 2026**

### **A Course Overview**

- Welcome and Opening Remarks and Intro to District Office (5 minutes)
- Cohort Overview (5 minutes)
- Elevator Speech Overview (15 minutes)
- CEO Introductions (60 minutes)
- Introduction and Overview of SBA Resource Partners (25 minutes)
- Wrap-Up Feedback/Aha Forms & Preparations for next session (10 minutes)

## **Module 2: 9:00am – 11:30am on April 2, 2026**

### **Market Research – Defining Your Customer**

- CEO Elevator Speeches (15 minutes)
- Market Research
  - What Am I Really Selling?
  - Who is My Next Customer? (90 Minutes)
- Discussion/Q&A – (35 minutes)
- Wrap-Up Feedback/Aha Forms & Preparations for next session (10 minutes)

**CEO Meeting 1:** 60-Minute Discussion on previous module, feedback on elevator speeches and class so far. Designate 1 person to take meeting notes to be shared at Module 3 (meeting date, attendance, discussion, points of interest, etc.).

#### Suggested topics:

- What did we learn about market research; anything new? Any new strategies to employ?
- Who precisely is your customer(s), what do they want-how do they want it-how much are they willing to pay for it?
- How is my elevator speech? Clear? Convincing? Concise?
- Aha moments so far?

## **Module 3: 9:00am – 11:30am on April 9, 2026**

### **Marketing – How to Reach Your Customer**

- CEO Elevator Speeches (15 minutes)
- CEO Meeting 1 Re-Cap
  - Each group identifies 1 interesting topic of discussion from the last CEO Meeting. (15 minutes)
- How to Reach Your Customer (80 Minutes)
- Discussion/Q&A – (30 minutes)
- Wrap-Up Feedback/Aha Forms & Preparations for next session (10 minutes)

**CEO Meeting 2:** 60-Minute Discussion on previous module, feedback on elevator speeches and class so far. Designate 1 person to take meeting notes to be shared at Module 4 (meeting date, attendance, discussion, points of interest, etc.).

#### Suggested topics:

- What did we learn about marketing platforms and our customers? Any new strategies?
- Name 3 things you will implement to enhance how you reach your customers.
- How is my elevator speech? Clear? Convincing? Concise?
- Aha moments so far?

## **Module 4: 9:00am – 11:30am on April 16, 2026**

### **Making the Sale and Retaining Customers**

- CEO Elevator Speeches (15 minutes)
- CEO Meeting 2 Re-Cap
  - Each group identifies 1 interesting topic of discussion from the last CEO Meeting. (15 minutes)
- Making the Sale and Retaining Customers (80 Minutes)
- Discussion/Q&A – (30 minutes)
- Wrap-Up Feedback/Aha Forms & Preparations for next session (10 minutes)

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**CEO Meeting 3:** 60-Minute Discussion on previous module, feedback on elevator speeches and class so far. Designate 1 person to take meeting notes to be shared at Module 5 (meeting date, attendance, discussion, points of interest, etc.).

Suggested topics:

- How are you currently making the sale?
- How do you retain customers and encourage word of mouth?
- What stuck with you most from the training?
- Is my elevator pitch getting better?
- Aha moments so far?

## **Module 5: 9:00am – 11:30am on April 23, 2026**

### **Preparing and Understanding Financial Statements**

- CEO Elevator Speeches (15 minutes)
- CEO Meeting 2 Re-Cap
  - Each group identifies 1 interesting topic of discussion from the last CEO Meeting. (15 minutes)
- Understanding Your Financial Statements and Why It's Important (80 minutes)
- Discussion/Q&A – (30 minutes)
- Wrap-Up Feedback/Aha Forms & Preparations for next session (10 minutes)

## **Module 6: 9:00am – 11:30am on April 30, 2026**

### **Examining Your Own Financial Statements**

- CEO Elevator Speeches (15 minutes)
- Effectively interacting with your CPA (35 minutes)
- Subject Matter Expert & CEO Breakout Discussion on Your Company's Financial Statements (90 minutes)
- Wrap-Up Feedback/Aha Forms & Preparations for next session (10 minutes)

**CEO Meeting 4:** 60-Minute Discussion on previous module, feedback on elevator speeches and class so far. Designate 1 person to take meeting notes to be shared at Module 7 (meeting date, attendance, discussion, points of interest, etc.).

Suggested topics:

- What's your comfort level with your Financial Statements now? Improved?
- Have you identified necessary changes after the review?
- Do you have cash on hand at the right time? Does cash on hand match your business operations? If not, what can you change?
- Is my elevator speech getting better?
- Aha moments so far?

## **Module 7: 9:00am – 11:30am on May 7, 2026**

### **Lender Panel – Accessing Capital with Traditional and Non-Traditional Lenders**

- CEO Elevator Speeches (15 minutes)
- CEO Meeting 4 Re-Cap
  - Each group identifies 1 interesting topic of discussion from the last CEO Meeting. (15 minutes)
- Lender Panel Discussion (90 minutes)
- Certificate Presentation -- Guests Welcome (30 minutes)

### **Next Level CEO – South Program Coordinator**

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