

# Transition to Trading 2014

## SESSION 1: Getting ready for selling, understanding how to productise your offering, diversification and trading

### Key outcomes:

- Understanding how to productise your offering
- What's involved in the switch from securing grants to selling services/products
- Price and Cost
- Identify your organisation's new approach to trading
- Feel better about selling
- Build your confidence – sales is a process
- Pricing – getting it right
- Understand opportunities and risks associated with growth
- Discover your leadership strengths and how to maximise these
- The habits of successful leaders in the social economy
- Understand the culture of trading organisations
- Leadership through change and transition
- Develop your organisation's pipeline for success
- Diversification and trading –governance, leadership, opportunities and costs

**9.45 – 10.00:** Arrival and refreshments

**10.00 – 10.30:** Welcome and icebreakers

**10.30 – 12.00:** **Witness session from Alastair Wilson, CEO of SSE**

### **SSE's journey to traded income and the culture shift required.**

Alastair started his career in the private sector working for six years in Marketing for ICL/Fujitsu computers, and then moved to become a student of the School for Social Entrepreneurs in 1998 which resulted in the development of Homeless Direct. Alastair raised over £500k to establish this project which aims to offer the general public a mechanism and campaigns to encourage them to give locally and directly to their local provider of emergency care for homeless people. Having established and run his own project, he returned to SSE as Development Director and then became CEO in 2004.

SSE's core service is a year-long 'action learning' based programme supporting early-stage social entrepreneurs from a wide range of backgrounds. SSE also offers specialist shorter programmes e.g. Social Franchising, Public Sector Spin outs and Trading for Sustainability. Over 100 social entrepreneurs have completed SSE programmes, and there are now 9 SSE franchises in the UK, 3 Australia and a recently established school in Ontario, Canada.

**12.00 – 12.20:** Quick tea break

**12.20 – 1.00:** Group work; who are you and what don't you want to lose?

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- 1.00 – 2.00:** Lunch
- 2.00 – 3.00:** Group discussions; what ideas do you currently have for products or services?
- 3.00 – 4.30:** Brainstorming ideas for your organisation
- 4.30 – 4.45:** Wrap up and evaluation
- 4.45:** We'll be heading down to Brigade Bar which is on the ground floor of our building. Brigade is a social enterprise which, together with the Beyond Food Foundation, offers vulnerable people catering apprenticeships. We hope you can come along, first round on us!

### *Day 2*

- 9.45 – 10.00:** Arrival and refreshments
- 10.00 – 11.15:** Group work
- 11.15 – 11.30:** Quick tea break
- 11.30 – 1.00:** **Witness session from Steve Sears, Director of Sears Solutions Ltd**

#### **Strategies for sustainable growth**

Stephen joined ECT Group in 1996 and contributed greatly to it as the Chief Executive over the 12 years he was there. ECT is an award-winning provider of local community transport across the UK, it is both a charity and a social enterprise, combining business thinking with social values to deliver the highest quality transport services that provide the greatest social benefit for the communities they serve.

Stephen has over 30 years' experience in developing strategies for sustainable growth, particularly within social enterprise.

- 1.00 – 1.45:** Lunch
- 1.45 – 4.45:** **Expert session from Alasdair Inglis, Managing Director of Grow**

#### **Interactive workshop: Developing your marketing strategy**

Alasdair is CEO of Grow, a marketing consultancy and training organisation specialising in small businesses and social enterprises. Alasdair's passion for working with small businesses stems from his childhood in the west coast of Scotland, where his family ran restaurants, farms and a self-catering company. Alasdair has spent more than a decade hatching and implementing marketing strategies.

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The current Marketing Expert in Residence at the British Library, he develops and delivers marketing workshops for universities and businesses, such as UCL, and has taught on the Goldman Sachs 10,000 Small Businesses programme.

**4.45 - 5.00:** Evaluation and finish

### **SESSION 2: Presentation skills for pitching, strategy and business planning, sources of income**

#### **Key Outcomes:**

- Presentation skills for pitching – refine your style and win the business
- Discover your USP in pitching
- Get practical tips on how to pitch successfully
- Strategy & business planning to get fit for the future
- Developing a solid base for future sustainability
- Managing and leading organisational change
- Overcoming an established organisation culture
- Creating a positive place to work
- Understanding leadership in a new context
- How to create a culture of ownership and commitment
- Lifting the lid on social finance and how this works
- Understand the main players in the social finance world
- Understand the power of leverage
- What's involved in corporate supply chains

#### **Day 1**

**9.45 – 10.00:** Arrival and refreshments

**10.00 – 1.00:** **Expert session from Jennifer Mackay, Founder of Jump Training & Development**

#### **Pitching and presentation skills**

*A highly interactive session with Jennifer focussed on selling and pitching. Refine and develop your presentation style and public speaking skills through the lens of selling and pitching for business.*

Before starting Jump in 2006, Jennifer gained valuable business experience as director of two communication based companies. In educational consultancy, she provided recruitment and training expertise to schools, businesses and governments in Europe and the Middle East. At the start of the internet boom, she co-founded a website that operates in four countries and featured in the Independent's "ten of the best". These experiences taught Jennifer how clear communication elevates vision, teamwork and profitability.

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A regular contributor to the "communication debate" Jennifer is often asked to talk on communications at events and conferences. She has appeared on BBC Radio 4, BBC Five Live and in the Telegraph and Guardian newspapers.

Jennifer was awarded Trainer of the Year 2011 - 2102 by the SpeakersTrust.

- 1.00 – 2.00:** Lunch
- 2.00 – 4.00:** **The Trading Challenge**
- 4.00 – 4.30:** Evaluation and wrap up

### *Day 2*

- 9.45 – 10.00:** Arrival and refreshments
- 10.00 – 11.30:** **Expert panel on sources of income**
- Natalie Tickle, Group & UK Charity & Communities CR Manager
  - RSA Louise Garner, Head of Grant Management Team, SSE
  - Michael Norton, Chairman and Co-Founder, BuzzBnk
  - Gareth Zahir-Bill, Senior Investment Manager, CAF Venturesome
- 11.30 – 11.45:** Quick tea break
- 11.45 – 1.00:** Group work
- 1.00 – 2.00:** Lunch
- 2.00 – 4.00:** Group work
- 4.00 - 5.00:** **Witness session from John Brown, Chairman, Camara**

### **10 tips for growing your income**

John Brown began his career working for a number of book publishing companies before becoming managing director of Virgin Books in 1982.

In 1987 John established John Brown Publishing and produced Hot Air the inflight magazine for the fledgling Virgin Atlantic Airways and Viz Comic. He expanded the John Brown Publishing consumer titles with Fortean Times and launched Gardens Illustrated. On the contract side there were more inflight clients and magazines for Classic FM, Waitrose, Nat West and Sky. John sold the Company in 2004.

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Since then John has managed the Ukulele Orchestra of Great Britain, has been chairman of the Wisden Group and has launched Bob Books, a digital photo-book website. He is also chairman of the travel company Wild Frontiers, and a director of Wanderlust Publications, Punk Publishing, The Oldie and Pippa Small Jewellery. He is a trustee of the School for Social Entrepreneurs and Chairman of Camara UK, a charity that distributes refurbished computers and teacher training to African schools.

### SESSION 3: Leading the change, branding and marketing

#### Key outcomes:

- Develop techniques that enable you to better meet your goals
- Refine your personal goal planning
- Get support for the future and work with a buddie
- Learn how to build effective partnerships
- Manage and develop partnerships
- Understand how partnerships can help you achieve greater social mission
- Partnerships and finances – the potential for leverage
- Leadership through change
- New governance structures
- More on how to develop and maintain an effective organisational culture
- Lessons in transitioning from grants to sales
- Balancing money and mission in a sales environment

#### Day 1

**9.45 – 10.00:** Arrival and refreshments

**10.00 – 11.15:** Catch up and developments

**11.15 – 11.30:** Quick tea break

**11.30 – 1.00:** **Expert session from Vaughan Lindsay, CEO of The Dartington Hall Trust**

#### **Adjusting and developing your organisational strategy**

Vaughan Lindsay joined The Dartington Hall Trust as Chief Executive Officer in February 2004 from McKinsey and Company, the internationally renowned strategic management consultancy.

His first degree, in geography, from Oxford, was followed by an MSc in demography at the London School of Economics. Following a short assignment with Procter & Gamble, Vaughan then spent eleven years in the voluntary sector.

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His first role was with independent health charity, the Kings Fund, during which time he was sponsored by his employer to study for an MBA at the London Business School.

He then spent six years at Shelter as a Director, a charity which had lost its way, but during his time there he played a key role in returning it to its highly influential position, simultaneously restoring its financial strength.

This was followed by a position as Deputy Chief Executive at the National Council for Voluntary Organisations (NCVO) which again was transformed during his tenure as he was instrumental in re-establishing the Council as a membership based organisation and as a voice for all voluntary organisations.

Head-hunted by McKinsey whilst at the NCVO, Vaughan then spent six years advising blue chip corporations on their strategy, marketing and sales, prior to joining The Dartington Hall Trust as CEO.

Vaughan is a Trustee of the School for Social Entrepreneurs. He is also a Board member of the Heart of the South West Local Enterprise Partnership.

1.00 – 2.00: Lunch

2.00 – 4.00: **Witness session from Miranda McKearney, Founder and former CEO of The Reading Agency;**

### **Alternative ways of approaching earned income**

In 2002 Miranda McKearney OBE founded The Reading Agency alongside Anne Sarrag and Debbie Hicks. She was CEO for the next 11 years, and oversaw the development of the charity during a period of massive change in the library, education and publishing sectors.

Miranda's highlights from these years are the feedback from people whose lives have been changed.

When she stepped down in December 2013 Miranda said: "The Reading Agency has grown from being an entrepreneurial experiment into a force for change - helping change lives through reading. Through our programmes like the Summer Reading Challenge we have given 7 million people opportunities to become more confident and enthusiastic readers. I'm immensely proud of what we have achieved and as I approach 60, it's time for a new leader to take the organisation into the future."

Miranda is now on a series of new adventures - tackling some of England's big walks, exploring how reading can build young people's emotional literacy, and finally learning how to grow vegetables properly.

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### Day 2

9.45 – 10.00: Arrival and refreshments

10.00 – 11.30: Witness session from David McGlashan, Enterprise Officer at SSE

**Sales and marketing at SSE – lessons learned (learn from our mistakes!)**

11.45 – 1.30: Group work

1.30 – 2.30: Lunch

2.30 – 4.00: Witness session from Karen Lynch, CEO of Belu Water

### **Branding and Marketing – the Belu story**

Karen is the CEO of Belu, the UK's most ethical water brand, which in 2011 pledged to donate a minimum of £300,000 to WaterAid over the following three years, helping transform the lives of 20,000 people. Belu was started with the simple idea that there was a better way to do business by reducing environmental impact and using all profits to fund clean water projects.

Karen joined the company in 2010 and under her helm the social enterprise has increased its annual charitable donations from £30,000 in 2010 to £199,100 in 2011, far exceeding its target in the first year of the partnership with the leading water charity.

Using Karen's extensive business and marketing background, Belu embarked on a radical business strategy that increased its productivity while maintaining the company's founding principles – Belu has promised to never export its products and questions why people would want to drink imported water. She partnered the 100% carbon-neutral brand exclusively with WaterAid, launched products in convenient recyclable plastic bottles, secured shelf space for Belu in Sainsbury's and continues to develop working relationships with respected industry names such as Fifteen, Nobu, Smiths of Smithfield, Sketch and Zizzi, to name but a few.

Belu was recognized this year with awards from SMARTA 100, national Business Awards, Lloyds TSB People, Environment and Achievement Awards, CoolBrands and The Business Charity Awards.

Karen was recognized by the (PEAS) People and Environment Achievement Awards as Business Person of the Year 2012, overall Lloyds TSB PEA environment Champion in 2013.

Prior to her appointment at Belu, Karen was Barclays' Head of Branch Marketing for almost five years and before that she worked at Emap for 13 years, where she published magazines.

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**4.00 - 4.30:** Next steps, evaluation and wrap up