

Small Business Clinic Schedule

Waukesha County Technical College | Pewaukee, WI | November 7th, 2025

8:30 AM – 4:30 PM | General Session Presentations

9:00 AM – 4:00 PM | One-On-One Consultations

9:00 AM – 4:00 PM | LLC Formation Lab

9:00 AM – 4:00 PM | Resource Provider Tables

General Session Presentations Schedule:

8:00 – 8:30 AM | Registration, Breakfast, Coffee & Networking

8:30 – 8:45 AM | Welcome & Opening Remarks

Athena Agoudemos – Associate State Director, Wisconsin SBDC Network

Therese Thill – Executive Director, Waukesha Center for Business Growth

Gene Manzanet – Senior Director Diverse Business Development, Wisconsin Economic Development Corporation (WEDC)

8:45 – 9:10 AM | SESSION 1

Overview of OBE's Programs & Initiatives

Presented by: Colleen Merrill – Strategic Projects Director, Office of Business & Entrepreneurship (OBE)

Discover how the Universities of Wisconsin's Office of Business and Entrepreneurship (OBE) supports small businesses across the state. Learn about OBE's key programs and initiatives—ranging from technical assistance and capital access to entrepreneurial education and specialized clinics—designed to help Wisconsin entrepreneurs start, grow, and succeed.

9:10 - 9:20 AM | Break

9:20 – 10:20 AM | SESSION 2

Funding Resources Panel: Connecting Entrepreneurs with Lenders

Moderated by: Aaron Towns of BMO Bank

Panelists: Jack Walden, Senior Relationship Manager, MEDC; Laverne Davis, Town Bank, VP, Business Development Officer; Thalia Mendez, WWBIC Regional Director, Greater Milwaukee, Avelina Poppert, Waukesha State Bank, Egle Vaske, Spring Bank Commercial Lender

Learn about financing options available to small businesses, what lenders look for in applicants, and how to best prepare for funding success. This interactive session will include Q&A and practical insights to help you access the capital you need to grow.

10:20 - 10:30 AM | Break

10:30 – 11:30 AM | SESSION 3**Option A:** Navigating International Trade: Strategies, Resources, and Opportunities**Presented by:** Chris Wojtowicz – SBDC Export Trade Consultant, Wisconsin SBDC Network; Koreen Grube – Director, US Commercial Service Wisconsin; Chelsea Libeck – Senior International Trade Specialist, US Commercial Service Wisconsin; Sue Dragotta – Global Business and Supply Chain Instructor at Waukesha County Technical College

Explore how your business can expand into global markets with guidance from Wisconsin's leading international trade experts. This session will cover key export strategies, logistics, and risk management while connecting you to valuable federal, state, and educational resources. Gain practical insights from experienced trade professionals who can help you take the next step in growing your business internationally.

Option B: Creating Your Business Plan: A Practical Guide Using the Business Model Canvas**Presented by:** Nora Roughen-Schmidt – SBDC Consultant & SSBCI Specialist, Office of Business & Entrepreneurship (OBE)

Turn your business idea into a clear, actionable plan with this hands-on session led by SBDC Consultant and SSBCI Specialist Nora Roughen-Schmidt. Learn how to use the Business Model Canvas to define your customers, clarify your value proposition, and structure your business around the people you serve. Perfect for entrepreneurs looking to launch or refine their business strategy.

11:30 – 12:30 PM | Lunch**12:30 – 1:30 PM | SESSION 4:****Option A:** Small Business Taxes: What Every WI Small Business Owner Should Know**Presented by:** Tracey Mueller – Revenue Tax Specialist, Wisconsin Department of Revenue

Presented by the Wisconsin Department of Revenue, this session helps small business owners understand key tax responsibilities and stay compliant. Learn about filing procedures, available tax credits, and recent updates to Wisconsin tax law. Walk away with practical tips and resources to confidently manage your business taxes.

Option B: Workforce Solutions for Your Business**Presented by:** Department of Workforce Development**Moderated by:** Robin Paulsen of Job Center of Wisconsin**Panelists:** Bobby Nash, Equus; Leslie Pelikan, Apprenticeship; Deb Weber, WCTC; Tom Krystyn, Vets; Brandi Hernandez, DVR; Sandy Murphy, Job Service; Farita Leggett, DOC; Thomas Walsh, Regional Economist

Learn how to strengthen your workforce with no-cost programs and support available through Wisconsin's workforce development network. This expert panel will share practical strategies for

recruiting, training, and retaining talent—including work opportunity tax credits, work-based learning, on-the-job training, and apprenticeship opportunities

1:30 – 1:40 PM | Break

1:40 – 2:40 PM | SESSION 5

Option A: Financial Records and Strategy: Building a Strong Foundation for Your Business

Presented by: Wendy Potratz – Financial Consultant, Office of Business & Entrepreneurship (OBE)

Learn how to manage your business financials, interpret statements, and leverage key metrics to guide growth and long-term sustainability. This session provides practical tools and strategies to help you make informed decisions and strengthen your business's financial health.

Option B: Understanding the Basics of Small Business Law

Presented by: Tami Patel – Attorney & Interim Director, UW Law & Entrepreneurship Clinic

Gain a practical understanding of business law, covering contracts, business structures, intellectual property, and employment law. Learn how agreements are made and enforced and explore how to protect your ideas and creations.

2:40 – 2:50 PM | Break

2:50 – 3:50 PM | SESSION 6

Option A: AI for Small Business: Practical Strategies for Growth

Presented by: John Muraski – AI Clinic Manager, Office of Business & Entrepreneurship (OBE)

Learn how artificial intelligence (AI) is transforming small businesses, automating tasks, and enhancing customer experiences. This session provides practical AI strategies to help entrepreneurs improve efficiency and marketing.

Option B: Small Business Survival Guide for Digital Marketing Success

Presented by: Connor Walsh & Ella Roux – Student Consultants, Universities of Wisconsin's Digital Marketing Clinic

Learn practical digital marketing strategies designed to help small businesses grow, attract customers, and stand out online. This session covers essential tools, tactics, and tips to maximize your marketing impact and drive business success in today's digital landscape.

3:50 – 4:00 PM | Closing Remarks & Wrap-Up

One-On-One Consulting Appointments:**1:1 General Small Business**

- Melanie Manuel – SBDC Consultant, Wisconsin SBDC Network at UW Milwaukee
- Alia Carroll – SBDC Consultant, Wisconsin SBDC Network at UW Eau Claire
- Jason Schleip – SBDC Consultant, Wisconsin SBDC Network at UW Whitewater

1:1 SSBCI Small Business Services

- Nora Roughen-Schmidt – SSBCI Specialist, Office of Business & Entrepreneurship (OBE)
- Jesus Nanez – SBDC Consultant, Wisconsin SBDC Network at UW Milwaukee

1:1 Marketing, Social Media, and E-Commerce

- Kathy Fredrickson – Director, UW Digital Marketing Clinic (DMC)
- Student Consultants x5 – UW Digital Marketing Clinic (DMC)

1:1 International Trade

- Chris Wojtowicz – Export Trade Consultant, Wisconsin SBDC Network

1:1 Legal Services

- Tami Patel – Attorney & Interim Director, UW Law & Entrepreneurship Clinic
- Mark Fernandes – Legal Fellow, UW Law & Entrepreneurship Clinic

1:1 Accounting and Finance

- Wendy Potratz – Professional Financial Consultant, Office of Business & Entrepreneurship (OBE)
- Mary Pangman Schmitt – Professional Financial Consultant, Office of Business & Entrepreneurship (OBE)

1:1 Artificial Intelligence (AI)

- John Muraski – AI Clinic Co-Manager (SBAIC), Office of Business & Entrepreneurship (OBE)
- Logan Kelly – AI Clinic Co-Manager (SBAIC), Office of Business & Entrepreneurship (OBE)

1:1 Commercialization & SBIR/STTR Funding Programs

- Rob Baranowski – Technology Consultant, Center for Technology Commercialization (CTC)
- Todd Strother – Senior Technology Consultant, Center for Technology Commercialization (CTC)

1:1 Food, Farm, or Ag Businesses

- Anna Thomas – Farm Finance Specialist, Food Finance Institute (FFI)

1:1 Taxes w/ Dept. of Revenue

- Tracey Mueller – Revenue Tax Specialist, Wisconsin Department of Revenue

Additional Offerings:**9:00 – 4:00 PM | LLC Formation Lab**

Form your LLC in a few easy steps with the LLC formation lab. Bring your laptop and credit card and consultants will walk you through the process of forming your LLC. The State of Wisconsin charges \$130 to file the online application and paperwork.

Consulting provided by:

- Amy Narr – SBDC Consultant, Wisconsin SBDC Network at UW Milwaukee
- Greg Martin – Center Director, Wisconsin SBDC Network at UW Milwaukee
- Fernando de la Sancha – Student Consultant, Wisconsin SBDC Network at UW Milwaukee

9:00 – 4:00 PM | Resource Provider Tables