



Support provided by:



# BASHAW BUSINESS NAVIGATION SUPPORTS PROJECT

## NEEDS ASSESSMENT REPORT & RECOMMENDATIONS – AUGUST 2024



Prepared by C4ner Consulting



# PROJECT OVERVIEW

This project aims to support all Bashaw businesses to stay viable and to grow. The first phase is this **needs assessment** to identify priority topic areas where Bashaw businesses need the most support. It was conducted from May to August 2024:

- **60** Bashaw business owners were invited to participate in a needs assessment survey asking about their current challenges and what supports might help their business to succeed. **31 surveys** were submitted (52% response rate).
- **11 interviews** were held with entrepreneurs in-person and online to further explore the most requested topics. **Two conversations** were also held with project partners, but we could not reach a representative from the community centre. Recommendations are based on this input, ensuring that business supports will be relevant and tailored to Bashaw business owners' current needs.

The second phase will be to develop **business supports**, as identified by the needs assessment report and recommendations, to be delivered from October 2024 to April 2025:

- Up to 6 **workshops** to address the most common challenges identified.
- 1-on-1 business **coaching** to address individual business needs, either as a follow-up to workshops or as standalone sessions based on owner-identified needs.
- Navigational assistance to connect Bashaw businesses to existing support programs and **resources**, based on the priority topics identified.

The third phase of the project will provide **economic development training** for project partners to enhance and sustain the support they can provide to Bashaw businesses. This includes identification and implementation of economic development activities to benefit businesses in Bashaw (April to June, 2025).

This project was created through a partnership between the Town of Bashaw, the Bashaw Community Resource Centre, and the Bashaw Chamber of Commerce. It is funded by a grant from the Government of Alberta's *Small Community Opportunities Program*. The grant was awarded in May of 2024 and the project is expected to be completed by the end of September 2025.



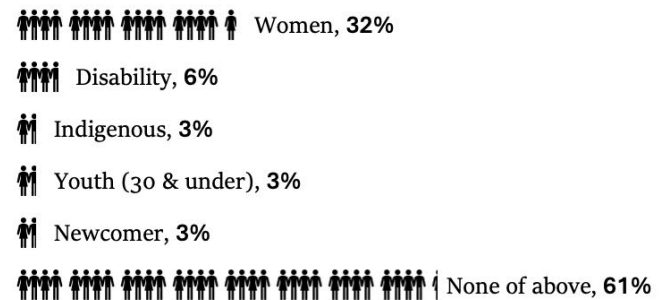
# PROFILE OF BASHAW BUSINESSES

31 entrepreneurs responded to the survey across 6 sectors. Some offered products and services locally/regionally and some targeted a broader geographic market. 39% of business owners were women, people with a self-identified disability, Indigenous, youth, or newcomers to Canada.

## Survey Respondents by Sector

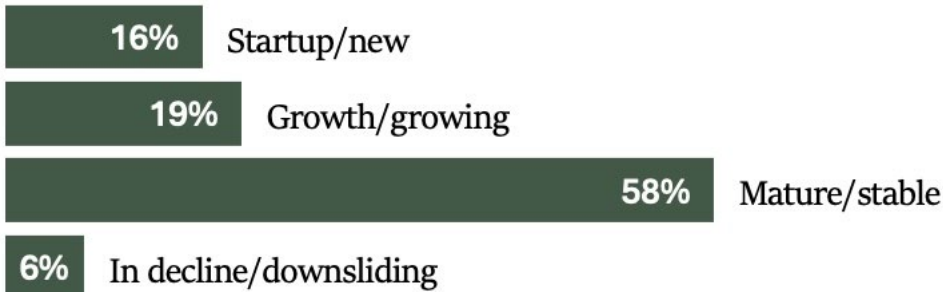


## Business Owned/Led By...



There were diverse levels of business experiences among entrepreneurs in Bashaw with over half (58%) reporting their business to be at a mature/stable stage; 35% were at the startup stage or looking to grow. Based on this profile, supports will need to be tailored for the different needs of startups versus mature businesses, although some topics may be relevant to both.

## Business Stage

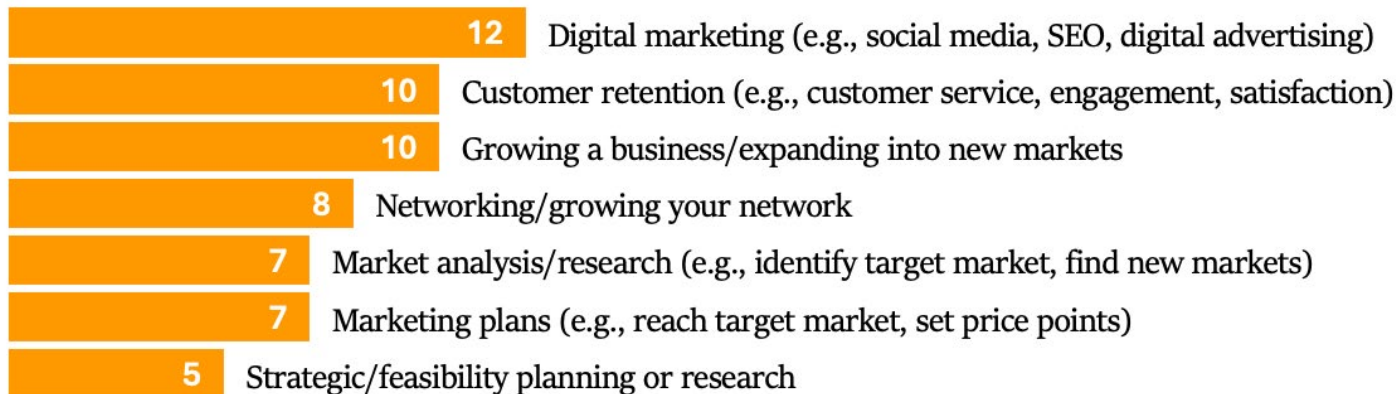


“  
We perceive ourselves as having business acumen under our belt.  
– 7 YEARS IN CURRENT BUSINESS

“  
There’s so much to running a business. This project couldn’t have come at a better time. It’s the first time I’ve owned a business and I’m going by the seat of my pants. I’m sure I could do it with the right training.  
– 8 MONTHS AS AN ENTREPRENEUR

# SERVICES & SUPPORTS FOR BASHAW BUSINESSES

## Market Growth & Development



## MARKETING PLANS, ANALYSIS & RESEARCH

### *Identifying Target Markets / Market Analysis & Feasibility Research*

Entrepreneurs in Bashaw expressed the most interest in support for growing and marketing their business. They described challenges with identifying target markets and successfully appealing to and drawing in customers. This affected all owners from new/startup businesses to mature/stable businesses. For example, one interviewee had not yet set up a business because they did not know what would do well in Bashaw, or how to match their skillset to the kinds of services customers would want. A new business owner did some market research through a local community events page to find out what services people would want but was struggling to market and cater their services to a rural community.

Experienced owners also identified barriers to business growth and reaching new markets. One entrepreneur was unsure if they should expand to sell retail products in addition to their services. Another offered a variety of products but was unsuccessful in attracting new customers despite rotating their offerings. Several businesses were utilizing technology to conduct market research, such as analyzing customer data in Square to identify profitable products and inform what they should and should not keep. One entrepreneur reviewed Google Analytics and identified a gap among rural customers but did not know how to address the issue. One business had a customer relationship management (CRM) system but had not yet used the data to inform how they could reach new markets and grow the business.

Some owners felt they needed to grow to remain profitable but encountered barriers they did not know how to overcome. Several businesses would need a larger physical space or facility to accommodate growth, and the owners had not been able to assess the cost/benefit of the investment. One business would need to expand their inventory to compete with big box stores but did not have either the space or cashflow to do so. Others identified Bashaw's population size as a limit to their customer base but did not know how to expand their appeal outside the town.

“

It's been hard trying to target people in town. Everybody's used to their current brand. We started out with two options to keep it simple. It took off with some, but not as big as we were hoping.

- EXPERIENCED OWNER

“

We aren't using our CRM system properly. Unless you have 2 to 3 years of history, the information isn't very useful.

- EXPERIENCED OWNER

“

We only have so much space and cashflow to bring stuff in. To compete with the larger companies, we'd need to have the products in the store.

- EXPERIENCED OWNER

“

How big can you grow your business in a small town?  
You'd have to reach out further.

- EXPERIENCED OWNER



## Reaching Target & New Markets

Businesses in Bashaw struggled to reach local, regional, and online markets to get the word out about what they have to offer. A new business was struggling to let people know they had opened and to communicate their services and products. A mature business experienced limitations with attracting local customers who worked outside of town and did not frequent the downtown area. Another owner thought there was potential to attract new customers from Edmonton and Calgary and would like guidance on how to expand their marketing. Several owners noted time as a limitation - that they were too busy operating their business to spend time on promotions.

“

I have a good idea what products people need here and why. We just need to get our name out there and let everybody know what we do and what services we offer.

- NEW/STARTUP OWNER

“

Some people live in town but don't come downtown or know what it has to offer. Some didn't know we were here even though we'd been open for six years. That baffled us.

- EXPERIENCED OWNER

“

I don't think 5% of those who live here come into our store

- EXPERIENCED OWNER

“

Competition is a challenge, but mostly it is time. I couldn't do the legwork to get my name out there because I was busy running my business. I am always in the shop

- EXPERIENCED OWNER



## Customer Retention & Setting Price Points

Multiple entrepreneurs found it difficult to find the balance between setting prices high enough to be profitable but low enough that customers would be willing to pay. High costs of inputs put pressure on customer retention when products or services could be bought elsewhere or online for a lower price than local businesses could afford to charge. One business is exploring options for setting up a customer loyalty program, but others had no strategies of how to balance profitability with customer retention and would welcome support in this area.

“

We're investigating a loyalty program. We have a handful of clients that will exclusively use us. Other than that, if we don't have it in stock, they buy it somewhere else.

- EXPERIENCED OWNER

“

I'm always guessing what to charge people. It's a weird dynamic because people in small towns expect things to be cheaper. However, you're doing more driving to get those items, and I can't order in bulk because I don't have high volume. It's hard to figure out what people will buy, and how to price things so they'll buy it.

- EXPERIENCED OWNER

## DIGITAL MARKETING

To reach their target markets, most business owners immediately thought of digital marketing as well as traditional advertising as the most important strategy to attract more customers and grow their business. Most had used a variety of marketing strategies with mixed results. Support to develop effective and affordable digital marketing and other advertising strategies was the most frequently requested area of support by Bashaw business owners.

### *Websites & Search Engine Optimization (SEO)*

Businesses reported varying levels of success in using a website as a marketing strategy. One business did most of their sales online and was considering investing in SEO. Another owner had expanded their business and felt their website needed a new marketing plan and strategy to better communicate what products they offered. They were also interested in better understanding if their website was reaching their target audience and how effectively it was showing their products to online markets. A third business reported that their website and online store had been ineffective in increasing sales. A fourth had paid someone else to set up their website and now does not know how to update the content.

Despite these diverse experiences, all entrepreneurs would like support to understand if and how a website could help their business, as well as how they could maximize its value through strategies like SEO and customer analytics.

“

We're letting our website go because it's never really done anything for us in seven years. It's an expense that's not bringing in business. Nobody ever ordered from our online store. I didn't do SEO or analysis because I didn't know enough about it.

- EXPERIENCED OWNER

“

I think a lot of people get lost with the term SEO, but it's where we've got to be.

- EXPERIENCED OWNER

“

I understand what SEO is, but I don't have anybody doing it. If we gotta pay the Google monster \$1,000 for the next 4 months then we gotta do it, right?

- EXPERIENCED OWNER



## Social Media

Businesses reported inconsistent levels of success using social media to reach their target markets. Most were using Facebook, and a few were using Instagram. One business found most of their contacts through social media and thought it was successful. Others did not have the time and/or knowledge to update their social media content, but felt any online presence was better than nothing to get the word out about their business. Customer reviews on social media were seen as a double-edged sword – good reviews might increase business, but negative views could be detrimental. Owners could use support with how to use social media effectively and efficiently.

“

I spent thousands on putting stuff through the mail and only got three calls. 80% of my contacts are through Facebook.

- NEW/STARTUP OWNER

“

I'm not a tech person and digital marketing isn't my forte. I can put something together and throw it up on Facebook, but is it doing what I'm hoping it's doing?

- EXPERIENCED OWNER

“

I badly neglect my Facebook page and Instagram. I'm just too busy to post updates about what I'm offering.

- EXPERIENCED OWNER





# TRADITIONAL MARKETING

## Offline Advertising

Entrepreneurs recognized that digital marketing may not be an effective strategy to reach some of their customers. Other strategies they had considered included placing ads in the Bashaw Star newspaper, putting signs along the highway, printing flyers and business cards to distribute and post on bulletin boards around town, getting logos for their vehicles, and promotion through word-of-mouth. They would like guidance on what strategies would be most effective and cost-efficient, or ideas for other approaches they have not thought of. Some would like more support from the Town to help promote their businesses through signage and bulletin boards in common spaces.

“

You have to think of the community. My farmer dad is not on Facebook and won't see anything I post. Who knows if the newspaper would work to reach farmers?

- NEW OWNER

“

We'd like to put up signage on the main street to entice traffic our way.

- NEW OWNER

“

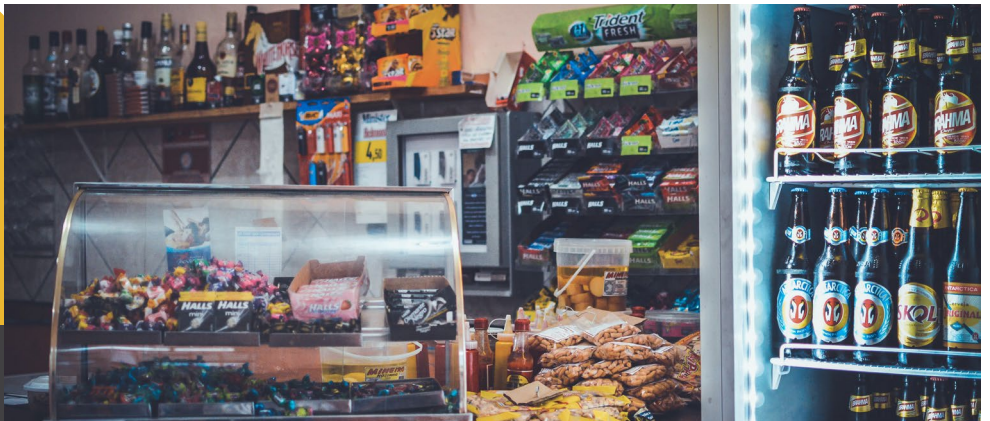
I looked into putting signs along the highway but the government charges \$1,000 per year. I didn't think it was worth the cost.

- EXPERIENCED OWNER

“

Any advertising support would be wicker. It's a good opportunity for Bashaw to say that we have a lot of different businesses that some small towns might not have.

- EXPERIENCED OWNER



## Networking

As a strategy for growth, entrepreneurs in Bashaw are interested in networking both among businesses within the town as well as regionally and within their industry. One new entrepreneur would like to talk to similar businesses elsewhere (e.g., not in competition with them) to learn about their operations (e.g., what insurance to get, which suppliers they use). Several businesses have engaged in events or donated their products/services to contribute and build community connections. However, several business owners, particularly those whose customers were local, felt there were not enough places or opportunities in town to network and meet people. One person acknowledged the efforts of the Chamber of Commerce to organize a meeting for local businesses to discuss improvements but was disappointed with the low attendance.

“

There's no support in town.  
There's no place to build  
platforms or meet people.

- NEW OWNER

“

If we did do networking, I would prefer to meet with  
businesses in town and talk together about strategies to  
make things better. It isn't useful for my business to network  
externally.

- EXPERIENCED OWNER



# Business Operations

8	Building/increasing business capacity
8	Operations (e.g., time management, business efficiency)
4	Taking/maintaining a business online
4	Business setup and structure, contract development

## OPERATIONS, EFFICIENCY & DIGITIZATION

Bashaw business owners have a strong interest in making their business operations more efficient, either to increase their capacity or to achieve a better work-life balance through streamlining. Some had already identified and incorporated efficiencies such as online appointment booking or selling through an online store. One owner had ideas for automating their customer service to free up time but needed support to identify and set up the technology to implement their vision. Another business wanted to add online order functionality to their website but did not know how. One business was experiencing technical problems with their website resulting in a large drop in online orders, which needed to be resolved quickly.

Some businesses had made progress to integrate technology into their operations but had limited knowledge of its full capabilities. One owner saw potential to connect their point-of-sale system and accounting software but was not sure how to set it up. One business reported losing customers to larger companies because, despite providing service manually within a short turnaround time, some customers preferred automation which they did not have. Other entrepreneurs were not sure what they needed to do to improve efficiency. For example, they were not able to assess if incorporating technology would improve their operations nor were they able to determine if the benefits would be worth the time and expense.

A few entrepreneurs wanted guidance on the ‘how to’ of their operations, mostly around legal and regulatory aspects. This included considerations for their business setup and structure (e.g., incorporation vs. sole proprietorship), types of insurance, developing contracts and liability waivers, and procedures for collecting from clients who had defaulted on a payment.

“

I'm doing Square booking and it's been pretty successful. The link is posted on my page and people can go in and book for whenever they want.

- NEW/STARTUP OWNER

“

I wonder if Square and QuickBooks are interchangeable. Can I set them up to read each other without having to put too much effort into the bookkeeping side?

- EXPERIENCED OWNER

“

Everything is done by hand. I can provide the same service as bigger stores, and quickly and locally. It's just trying to get people to see that.

- EXPERIENCED OWNER

“

I don't think I'm big enough to incorporate, but maybe I am? I'd like advice on incorporating vs. sole proprietorship

- NEW/STARTUP OWNER

# Financial Services

- 10 Securing financing (grants/loans)
- 8 Access to capital to grow your business
- 5 Risk assessment/management (e.g., plan for rising costs, supply chain issues)
- 2 Financial planning (e.g., budgeting, accounting, bookkeeping, tax filing/compliance, payroll)
- 2 Financial management (e.g., cashflow, cost recovery, long-term capital costs, investments)

## FINANCIAL & RISK PLANNING/MANAGEMENT

Financial planning and management were not selected by many respondents on the survey, but multiple interviewees expressed limited knowledge or experience with the financial aspects of their business. New entrepreneurs had little to no experience in areas such as business accounting, bookkeeping, tax filing, or using financial software. Some wanted to learn how to do this aspect of the business themselves. Others had an accountant or bookkeeper but thought they should learn the basics so they better understood the requirements and their obligations as a business owner.

Some owners would like support to identify their risks and to plan ahead. They struggled to manage cashflow due to increased input costs like electricity and shipping, ebbs and flows in revenue at different times of the year and setting funds aside to pay taxes. One owner was trying to balance current costs (e.g., building up inventory) and saving for the future (e.g., in case of equipment failure). Another had diversified their retail products to cover the off season, so was feeling financially stretched. One business was buying supplies at high price points and wanted help planning their annual cash flow cycle to get a better return on investment. One owner would like guidance on financial planning for retirement (e.g., CPP).

“

We have an accountant, but I'd like to know more about it personally.

- NEW /STARTUP OWNER

“

Taxes, accounting, bookkeeping, software. The whole thing. We didn't file taxes properly in our last business and it was a mess. I'm terrified of doing things wrong again.

- NEW/STARTUP OWNER

“

I didn't know you had to pay taxes on a business that's only been running for two months. For that or if equipment breaks down, we should be planning out a little bit.

- NEW/STARTUP OWNER

“

There are opportunities where we could potentially make more money on our products and get a better return on investment if we had the cash flow to be a little bit more strategic.

- EXPERIENCED OWNER



## SECURING FINANCING & ACCESS TO CAPITAL

Entrepreneurs would like assistance to identify available financing (e.g., loans, grants, access to capital) to grow their business. Several owners had investigated loans or lines of credit but encountered barriers to securing financing. High interest rates were a common challenge, which raised concerns about repayment. A few entrepreneurs already had loans or poor credit scores and had been turned down by banks when requesting funding. One person felt the paperwork burden was too high for the small loan they needed, while another was not aware that a business plan was required to apply for a loan.

A few entrepreneurs wanted strategic financial advice such as restructuring and consolidating existing debt or assessing risk in terms of the amount of debt they should take on. A few were interested in grants but did not know where to look. This included grants for hiring a college student, support for mental health and wellness, work with children or the elderly, events or economic development initiatives, startups in certain sectors, or underrepresented groups of entrepreneurs.

“

I was able to start up for a couple thousand dollars. My husband would need more like \$40,000. Do we have the credit to get the financing to do it? Should we do it?

- NEW /STARTUP OWNER

“

I don't know where to go for funding. Interest rates are crazy. Where do you go for help so you're not paying it back for the rest of your life?

- NEW/STARTUP OWNER

“

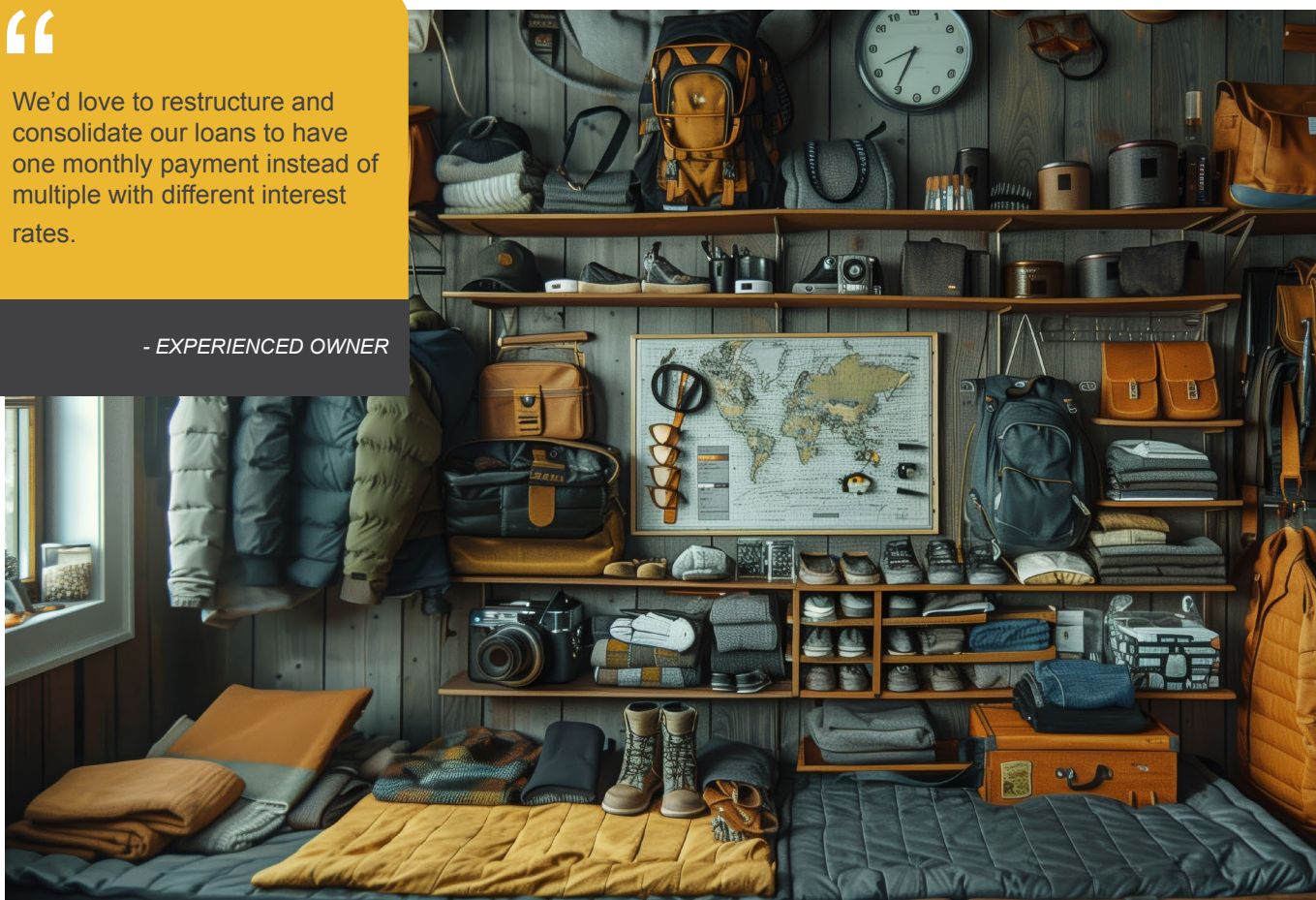
I'd need \$20-\$30K in capital for inventory to expand and grow my business. The bank did not want to loan me the money.

- EXPERIENCED OWNER

“

We'd love to restructure and consolidate our loans to have one monthly payment instead of multiple with different interest rates.

- EXPERIENCED OWNER

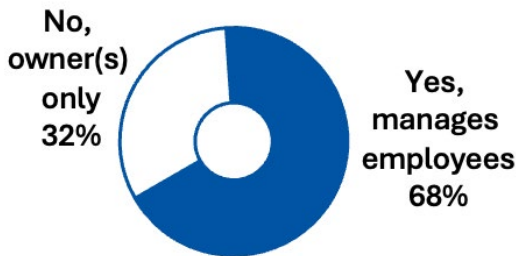


## Human Resources & Work Culture

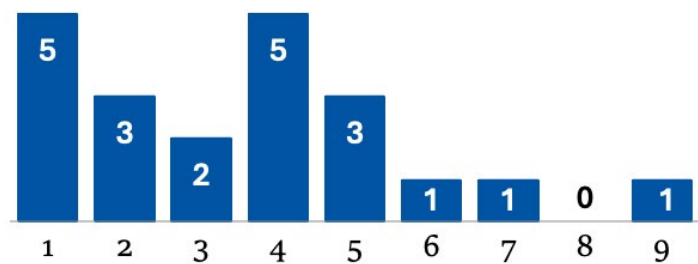
8	Mental wellness (e.g., fatigue, stress, anxiety, work/life balance)
7	Human Resources (e.g., attracting, retaining, managing, training, motivating employees)
7	Occupational Health & Safety (e.g., psychological safety, inclusivity, bullying/harassment)
5	Employment and labour laws (e.g., adherence to labour laws, WCB)
5	Succession planning

Human resources support would be relevant for 68% of businesses in Bashaw. These owners reported managing anywhere between 1 to 9 people.

### Management Role



### Number of Employees



## ATTRACTING/RETAINING EMPLOYEES & LABOUR LAWS

Some Bashaw business owners had reliable employees with the knowledge, skills, and experience that were an asset to the business. Others struggled to find dependable employees or were not able to retain them over time. The impact on owners was seeing no return on the time they spent training new staff as well as working longer hours to cover vacant shifts.

One solopreneur was doing so well they were turning down work. They were considering hiring a second person so they could take on more clients but did not know how to weigh the pros and cons of hiring staff. They would like help to assess the return on investment, how to screen applicants, and guidance around the requirements and processes for hiring. Several business owners who had only ever worked for themselves were now in the position of hiring others. They did not know the 'how to' of managing employees such as drawing up employment contracts, managing payroll, expectations around 'normal' workdays and overtime, managing performance issues, and generally complying with employment and labour laws.

A few people were nearing retirement and thinking about succession planning. Some did not know how to start this process or what they should consider. Two were struggling to find workers with the skilled experience required to potentially take over the business.

“

I'm so busy I probably could and should hire somebody to help me, but what do I know about all that tax and running a business stuff?

- SOLOPRENEUR

“

We've hired staff but I don't know how payroll works. What are normal hours and what is overtime? Should I get them to sign something so be both agree to what their duties are?

- MANAGES STAFF

“

I'll have a person start up, I'll do a certain amount of training, then they disappear.

- MANAGES STAFF

“

I'm over 60. I need help and need to find some new workers, but it's hard to find people who want to work in [my field] today.

- SOLOPRENEUR



## OCCUPATIONAL HEALTH & SAFETY

Some owners struggled with work-life balance, as time away from work for sickness or vacation often meant a loss of income. One thought they could achieve a better balance by being more efficient and organized in how they operated their business. Another would like more information about support tools or programs for burnout or mental wellness.

Several businesses expressed interest in occupational health and safety, in particular psychological safety and workplace inclusivity. Owners who attended the interviews were not able to explain this much further, although one reported struggling with psychological safety due to incidents of bullying and harassment in their workplace.

“

What tools or programs are out there for people who are struggling? Where do you point people who are getting burnt out?

- EXPERIENCED OWNER

“

Work-life balance is hard in a small town. I can't afford lots of employees. I would have to shut the shop down if I was sick.

- EXPERIENCED OWNER

# RECOMMENDATIONS FOR BUSINESS SUPPORTS

Based on the findings of the needs assessment, the following are recommendations for how to support current and aspiring entrepreneurs in the Town of Bashaw.

## *Workshops*

Deliver up to six workshops based on the most frequently requested topics, so they are relevant to the greatest number of businesses. The actual title for the sessions will need some marketing to ensure that the businesses would attend based off their expressed needs. Reevaluate what topics to continue in early 2025 based on the level of engagement with workshops offered in the fall of 2024.

Format: Many entrepreneurs were open to attending workshops either in-person or online, but several would prefer in-person because they find it more engaging, more focused/controlled, and provide an opportunity for networking. One found it difficult to engage online for long periods of time (e.g. >1 hour), particularly if there were distractions at home. If workshops are offered online, strategies to increase participation could include: 1) designing content to be delivered in sections for longer (half or full day) workshops and allowing participants to attend the sections most relevant to their needs; and 2) recording the workshops so others can watch the content asynchronously.

Scheduling: Business owner availability was mixed with no consistent time or day of the week that would fit most people's schedules. The best strategy is to book sessions in advance, so entrepreneurs have enough notice to set aside the time. If they are unable to attend, they could watch the recording later.

Topics:

1. Marketing Part 1: Identify your target market and keep customers coming back
  - Market analysis – Who is your target market and are there potential new markets?
  - Marketing plans – How to reach your target market and set price points?
  - Feasibility planning/research – Is growth feasible, viable, and desirable?
  - Customer retention – How to provide what customers want and keep them coming back?
2. Marketing Part 2: Getting the word out about your business
  - Digital marketing – Will websites, SEO, and/or social media reach my potential customers?
  - Traditional marketing – How do I network and attract customers who are offline?
  - Other ideas for marketing will be considered as the workshop are developed.
3. Leveraging technology for growth and efficiency
  - Growth – How can I use customer data to grow my business?
  - Efficiency – How can technology streamline my operations?

Example software: Point-of-sale, CRM, accounting, online stores, appointment scheduling



#### 4. Business structure and setup: Legal basics

- Business structure – Should I be a sole proprietorship, or should I incorporate?
- Business setup – Do I need insurance and permits?
- Contracts – How do I draw up sales and other contracts?

#### 5. Financial basics for people who hate financials

- Financial planning – How do I read financial statements?
- Financial management – What are my tax obligations and how do I plan ahead?
- Risk – How do I assess, plan, and manage for risk? What happens when costs go up?

#### 6. Human resources: Expanding beyond the solopreneur

- Hiring – How do I attract and retain employees? What are the labour laws?
- Psychological safety – How do I achieve a healthy work-life balance? How do I promote inclusivity and address bullying/harassment in the workplace?
- Succession planning – How do I plan for the future of my business?

## ***Coaching***

Offer up to 150 hours of coaching for up to 30 entrepreneurs. Sessions will be 1-on-1 and focused on the individual needs of the business owner. Sessions could be follow-ups after the workshops (workshop + coaching package) or be a topic requested by the entrepreneur. Coach(es) will be matched to each entrepreneur based on relevant expertise (and sometimes industry-specific).

Format: Entrepreneurs were open to coaching sessions delivered online, with the priority being to match them to a coach with the most relevant subject-matter expertise and experience.

#### Topics:

- Marketing Part 1: Target markets and market growth
- Marketing Part 2: Advertising
- Operations: Leveraging technology for efficiency and growth
- Operations: Legal & regulatory basics
- Financial planning & management basics
- Human resources: Hiring, labour laws, and psychological safety
- Self-identified topics

## **Resources**

Relevant resources will be researched and posted to a secure online business support webpage and organized by topic for easy navigation. They will include links to available programs, funding, and self-directed learning tools. The bank of resources will be added to iteratively throughout the project. Initial topic areas and resources identified through the needs assessment included:

- Technology/digital adoption
- Securing financing
- Financial planning and management
- Employment and labour laws
- Business plan development

## **Communications Strategy**

To maximize participation and benefits to businesses in the Town of Bashaw, the communications strategy should emphasize over-communication using multiple methods of information dissemination. Let people know about upcoming workshops, how to request coaching, and where they can find the provided resources through methods such as:

- Email (continue to update contact lists)
- Facebook posts on partner pages
- Voyent Alerts (continue to add people to receive the alerts)
- Phone calls
- Text messages

Have people sign up for the activities and send reminders as the date approaches. Schedule activities well in advance. Have all project partners and other community partners promote them (Town of Bashaw, the Bashaw Community Resource Centre, the Bashaw Chamber of Commerce and any others community groups identified through the interview process). Extend communications beyond current business owners to include aspiring entrepreneurs who could benefit from these supports as well. For example, family members who are not owners but support the business and those who are thinking of starting a business but need help to start.



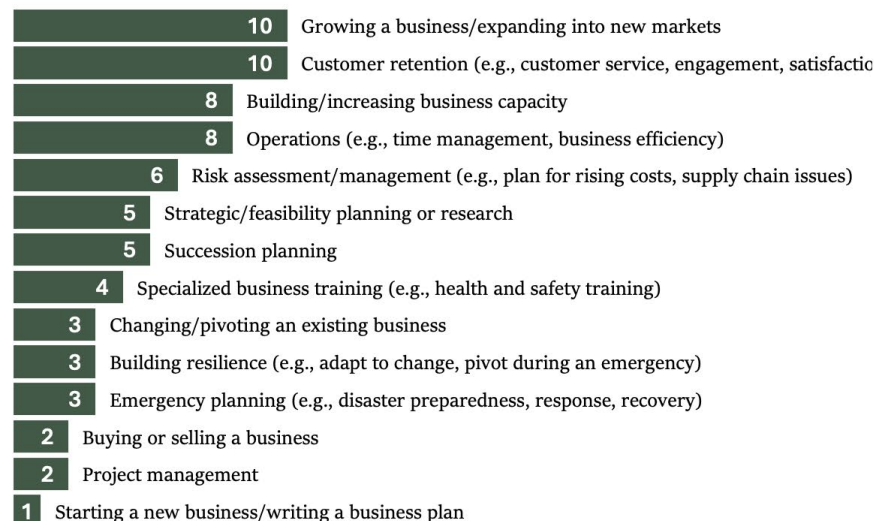


# What supports do entrepreneurs want in the Town of Bashaw?

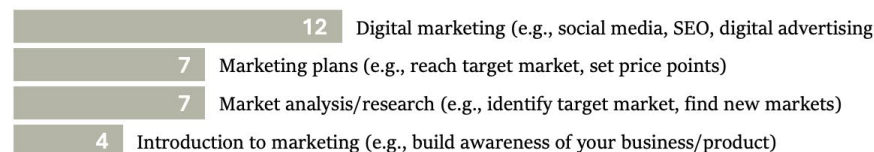
Based on input from **31 local businesses**, the top services requested were market growth/development including digital marketing, growing a business, customer retention, securing financing, building business capacity/efficiency, attracting staff, and networking.

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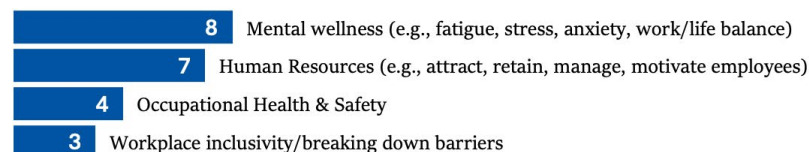
## Business Planning & Operations



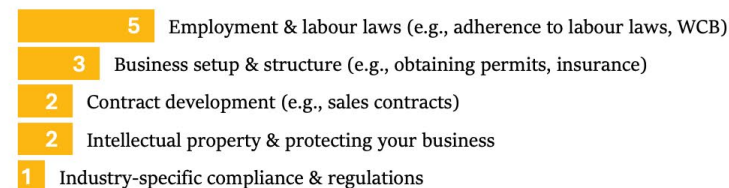
## Market Growth & Development



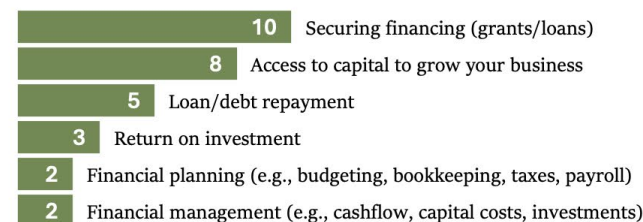
## People Management



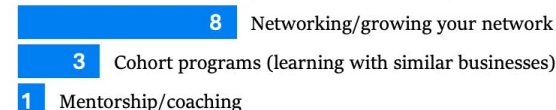
## Legal & Regulatory Services



## Financial Supports



## Business Coaching & Networking



## Physical & Technical Infrastructure

