



Eugenia Mora-Flores Consulting™

Eugenia Mora-Flores



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Executive Summary

Mora-Flores Consulting is an educational consulting service that surveys, coaches, and equips educators in linguistically diverse schools. Throughout the fall of 2021, Ms. Eugenia Mora-Flores collaborated with a team of students from the University of Colorado Colorado Springs Bachelor of Innovation (BI) program to help establish an LLC, develop and prototype a website, create a logo and name for her company, and draft a business plan to address the expansion of her company.

Establishing an LLC can be a complicated and arduous process, and due to the demand for her business's services, Ms. Mora-Flores did not have time to complete this task. This led the team to compile documents required to create an LLC in California as well as research, vet, and select an online service that guided Ms. Mora-Flores through registering her company as an LLC. In addition to this the team also researched and provided Ms. Mora-Flores with the necessary form to change the name of her company. To publicize the new LLC, the team developed a website. The website streamlined the process of contacting and scheduling Ms. Mora-Flores and allows her to efficiently deal with growing demand. In tandem with the website the team also drafted several logo and name ideas. The logo and name convey the beliefs and purpose of Ms. Mora-Flores's company in a visually pleasing manner. Over the course of the project the team accomplished the primary goals and some additional goals set forth by the client.

The new website gives future clients ways to contact the company and provides information about the specific services that *Mora-Flores Consulting* offers. This was an essential

goal for the project, since the main issue Ms. Mora-Flores was encountering was the overwhelming demand for her services.

To allow Ms. Mora-Flores to convey the key aspects and beliefs of her company several different logos and names were generated and presented to Ms. Mora-Flores. Each focusing on a different key belief that her company was founded on.

The team recommends that Ms. Mora-Flores reapplies for a second BI team in January 2022 to further develop, streamline, and advertise *Eugenia Mora-Flores Consulting*. While the prototype of the website is visually appealing and has the necessary features, those features are not entirely functional. The completion of this aspect of the project would be very beneficial in the expansion of Ms. Mora-Flores's company.

Statement of Accomplishments

Objectives

At the beginning of the project the team established four key objectives. These objectives were to establish an LLC, develop and prototype a website, create a logo and name for her company, and draft a business plan to address the expansion of her company. The team also added an additional goal of researching and providing Ms. Mora-Flores with proper documentation to change the name of her company after its initial establishment as an LLC.

Strategies

To work towards and achieve the goals set by both the team and the client, the team broke down each goal into its individual tasks. To establish an LLC the first step was to give Ms. Mora-Flores a list of all the documents necessary. The next step was to research and provide Ms. Mora-Flores with a service to guide her through the actual process of registering her company as an LLC.

The other three major goals were similarly broken down into individual and measurable steps that needed to be taken in order to achieve the end goal. These individual goals were then divided amongst the team according to everyone's aptitudes and previous experience with similar tasks. This was done in order to ensure each team member's expertise or experience was being utilized in an efficient manor to produce the best results possible. However, every aspect of each deliverable was reviewed by all members of the team collectively. This was done to allow each deliverable to be examined by several different perspectives. This allowed the team to approach each deliverable from a variety of viewpoints. Meaning certain problems or missing aspects were

more likely to be found due to the diverse perspectives examining the same deliverable. This was another layer of checks to ensure the work produced by the team was the best quality possible.

Changes in Objectives and Deliverables

Because of the nature of the tasks there the team modified three of the four major project goals. Designing and prototyping a website is at its core an iterative process, meaning the website must go through constant changes and iterations according to feedback given by the client. The final prototype went through several iterations with each improving on the last in order to achieve the client's desired result. Things like having Ms. Mora-Flores's address on the website had to be removed due to privacy concerns. Also, items such as certain images or videos had to be added due to the client's desire to communicate her abilities and services. The process of designing a logo was similarly iterative with several different ideas being presented to the client and feedback determining which logos would move forwards or which forms or colors would be included or excluded.

During the pursuit of the first goal to establish an LLC, the team identified two additional goals - the first of which was to generate and provide Ms. Mora-Flores with several names for her company that aligned with the message that she wanted to spread. The second was to provide Ms. Mora-Flores with the required documentation to change her company's name after being established as an LLC.

The goal of developing and prototyping a website was extended due to the amount of feedback and ideas being generated from discussion between the team and the client. In order to

accommodate the clients desires the deadline for the final website prototype had to be pushed back.

End Products

The first major goal to be completed was the establishment of Ms. Mora-Flores's company as an LLC. The team provided the client with a list of all the necessary documents and a service to guide her through the process of establishing an LLC. This limits the risks that Ms. Mora-Flores would take by running her company as a sole proprietorship. In addition, an LLC may be sold in entirety or partially (its assets) if Ms. Mora-Flores were to pursue this.

A second accomplishment was the design and implementation of a prototype website created for *Mora-Flores Consulting*. It allowed potential customers to use a streamlined service in order to contact Ms. Mora-Flores and inquire about booking her services as well as the nature of the services themselves. It also provided a clear informative summary of each individual service offered by Ms. Mora-Flores. Throughout the website there were several examples of Ms. Mora-Flores's services and books and talks that she has taken part in or written. This provided potential clients a clear message of the beliefs that Ms. Mora-Flores stands for and founded her company on.

The team also provided Ms. Mora-Flores with several different logo ideas. Ms. Mora-Flores chose the logo seen on the first page of this report for her company. The team was able to convey the message that the client wanted through the design and coloring of the logo.

The final accomplishment of the team was the creation of a business plan focused on expansion and handling increased demand with limited additional costs. The business plan

identified key positions that Ms. Mora-Flores was in need of. It also included a number of recommended qualifications for the positions listed in order to find proper candidates for the jobs.

The major accomplishments achieved by the team will allow Ms. Mora-Flores to efficiently and affordably handle numerous new clients as well as allow her to publicize the values, services, and name of her company to a much larger audience.

Recommendations and Innovation Discussion

During the collaboration with Ms. Mora-Flores the team was able to provide the client with a number of innovative ideas regarding the businesses operation, marketing, and structure. While the team was able to complete all of the high level goals set out at the beginning of the project and even add some extra goals along the way there is still much more to be done. To this end the Fall, 2021, project team is recommending that Ms .Mora-Flores apply for a second BI team in January, 2022. In order to guide the second BI team in working with Ms. Mora-Flores please take into consideration the following information.

In order to effectively advise Ms. Mora-Flores on business and marketing actions in the future research should be done on the market that the client is currently operating in. Information regarding the contracts and methods of payment that the client uses in order to work with both private and government involved school systems could prove valuable to guiding the structure and expansion of the client's company. Another key piece of information is marketing strategies employed by companies similar to the clients in the educational consulting market. This could help guide the creation of promotional videos or presentations that could be utilized to spread the knowledge of our company's business throughout the educational system.

The team also has some actions to recommend to our client Ms. Mora-Flores. The main actions recommended are regarding the salaries of other companies with similar responsibilities as those outlined in the business plan and recommendations provided. In order to have competitive salaries and ensure you are not overpaying employees this market research is a necessary first step before hiring the suggested employees. The client may also look into the

benefits of a temporary presentation/teaching position in order to mitigate benefit costs if this is a viable method of conducting her business.

Conclusion and Discussion

The client, Ms. Mora-Flores approached the Bachelor of Innovation program with the desire to establish her company as an LLC. as well as working on a variety of different areas including marketing, structure, and a business plan. Her company was currently unable to handle the increasing demand for her services due to the lack of manpower and organizational tools. She was also looking for a number of marketing tools such as a website, name, and logo in order to promote her company and create a more established and professional company. At the time of the project's conclusion the team was able to provide the client with a number of different tools and plans. The team provided a prototype website in order to streamline communication with potential clients and provide information about our client and what she stands for. In addition to the prototype website both a name and logo were developed and provided to the client according to the wishes and feedback given throughout the process of development. The team was also able to complete the major goal of guiding the client through the process of establishing an LLC. Finally, as an additional goal a business plan and list of recommendations for the expansion of the clients company was drafted and given to the client. It contained information such as recommended positions, qualifications, and interview questions in order to help guide the client through the process of expanding. It also had recommendations for accounting services especially considering that the client could work with government agencies.

It was an honour for the team to collaborate with Ms. Mora-Flores during the starting stages of her company. The demand and foundation of Mora-Flores Consulting is present and noticeable. Due to this solid foundation and growth potential the team recommends that Ms. Mora-Flores applies for a second BI team in order to be exposed to more innovative ideas when

it comes to the expansion, development, and marketing of her company. The team is very confident in the future growth of Mora-Flores Consulting and will look forward to working with her again or hearing about her success.

Supporting Materials

Appendix A: Project Charter

Mora-Flores Consulting BI Team

Project Charter

Name of the Project: *Mora-Flores Consulting*

Name of the Sponsor: Ms. Eugenia Mora-Flores

Purpose of the Project:

The client, Ms. Mora-Flores, requested assistance from the BI program with marketing, creating a business strategy, and establishing her company as an LLC. The team will work towards these goals by utilizing combined knowledge to establish her consulting business as an LLC. Team members will also assist Ms. Mora-Flores with creating an expansion strategy to ensure the increasing amount of business and interest can be handled efficiently. The team will guide Ms. Mora-Flores through the process of creating a business plan to assist her in making decisions regarding the expansion of her staff. Another goal is to develop an attractive Wix website, where Ms. Mora-Flores can automate her prospective client contacting workflow and appointments, as well as have a clickable resource to incorporate in future social media accounts, business cards, etc.

High-level Project Description and Boundaries:

In Scope:

- Establish company as an LLC
- Create business growth plan
- Develop a prototype website

- Design company logo
- Create company name in correspondence with logo

Out of Scope:

- Contacting potential clients
- Filing documents for the establishment of an LLC
- Creating a fully complete website
- a detailed and complete business plan
- Hiring decisions
- Making key business decisions

Objectives and Success Criteria:

The objective of the project is to transition Ms. Mora-Flores's company from a sole proprietorship to an LLC, along with designing a functional website and a thorough growth plan:

- **Objective 1:** Ms. Mora-Flores' business is a registered LLC in the State of California.
 - Success Criteria: Recommend an online service for filing LLC documents.
- **Objective 2:** Make a functional and aesthetically attractive website.
 - Success Criteria: The website is easy to navigate and has a clean look. The site allows prospective clients to contact, gain insight, and program knowledge of Ms. Mora-Flores' company.
- **Objective 3:** Design a growth plan for Ms. Mora-Flores' quickly expanding company.

- Success Criteria: Determined supporting administrative positions for the LLC, and other steps that will allow Ms. Mora-Flores to better address the demand for educational consulting.
- **Objective 4:** Pick an elegant color palette, design aesthetic, and logo style that aligns with Ms. Mora-Flores' company values.
 - Success Criteria: Prospective customers and prior clients recognize the distinct logo and associate the mark with Ms. Mora-Flores' company and values.

High-level Requirements:

- The information and tools required to convert the client's business from a sole proprietorship to a LLC provided to the client by October 18th, 2021.
- A marketing plan consisting of tactics used by competitors as well as possible future clients in the client's area, and an attractive website delivered before December 18th, 2021.
- A business plan identifying admin roles including specified qualifications and duties delivered by November 29th, 2021.

Assumptions:

- The project team has business and legal knowledge to turn the company from a sole proprietorship to LLC.
- The project team has access to education department heads around the country to bring consulting for new clients.

- The project team has access to website development software and the knowledge to create an effective website for client use.
- The team has advertising expertise in order to bring qualified and efficient individuals to the consulting business to help grow the company.
- Team has insight to specific business' clients to build marketing strategy catered to them.

Constraints:

- Time Zone differences between Colorado and California.
- The team cannot induct employees or clients for Ms. Mora-Flores' consulting company.
- The team cannot conduct education client consultations on behalf of Mrs. Mora-Flores.

High-level Risks:

- Risk 1: Feedback
 - The team has been unable to meet with the client on a regular basis. If the team is unable to have weekly check-ins or communication, then the ideas and designs given to the client will not be guided by the client's feedback and will be unable to be used for the team's project.
 - Probability: Low
 - Impact: High
 - Planned mitigation actions: If communication through a Teams meeting is not possible the team will update the team's client at least weekly through emails to ensure the team's work and ideas meet with the team's client's approval.
- Risk 2: Website Limitations

- If the client desires features for the website that are not free, then the website may not look as professional as it could
- Probability: Low
- Impact: Medium
- Planned mitigation actions: Determine costs of pay-only features to share with the client and have the client pay for them. Alternatively, find free components that can be used in place of the pay-only features that still meet the client's requirements

Summary Milestone Schedule:

- **Milestone 1: Draft LLC**
 - List of required documents and steps to be taken to establish an LLC
 - October 12th, 2021
- **Milestone 2: Create Rough Draft of Logo**
 - A number of different logos will be presented to the client to give feedback on
 - October 19th, 2021
- **Milestone 3: Rough Draft of Website**
 - A general draft of the website having to do with format, color, and design
 - November 2nd, 2021
- **Milestone 4: Rough business Plan**
 - A rough business plan proposal detailing the things the team believes would be most beneficial for Ms. Mora-Flores' company and its expansion
 - November 9th

- **Milestone 5:** Prototype of Logos
 - A selection of more flushed-out logos based on feedback given on the rough drafts
 - November 16th, 2021
- **Milestone 6:** Prototype of Website
 - A flushed-out prototype of the website including company name, logo, and contact information. Will also have a limited amount of functionality having to do with displaying programs or services
 - November 23rd, 2021
- **Milestone 7:** Business Plan
 - Flushed out and finalized business plan for Ms. Mora-Flores, detailing necessary actions that the team believes will be beneficial and detailing structure that the team believe will also be beneficial
 - November 30th, 2021

Stakeholder List:

- Stakeholder 1: Ms. Mora-Flores
 - Ms. Mora-Flores is the head of the company and lead visionary for “Eugenia Mora-Flores Consulting”. She will be giving direction towards what she wants to become of the company and give vision to how she portrays her company’s overall success.
- Stakeholder 2: School Districts within California

- School districts of California have a large impact on Ms. Mora-Flores’s business due to their ability to expose Ms. Mora-Flores to many future clients. This requires them to be taken into larger consideration when creating a marketing and business plan.
- Stakeholder 3: Schools within specific districts in California
 - Californian schools influence the consulting’s impact and future reach of teachers and students for Mora-Flores Consulting. Each school will have different needs that the client's program will tailor their work towards.

- **Approvals:**



- _____ September 26, 2021
- Client Date



- _____ September 26, 2021
- Team member Date



- _____ September 26, 2021
- Team member Date

Joshua Brown

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Team member

September 26, 2021

Date

Derek Anderson

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Team member

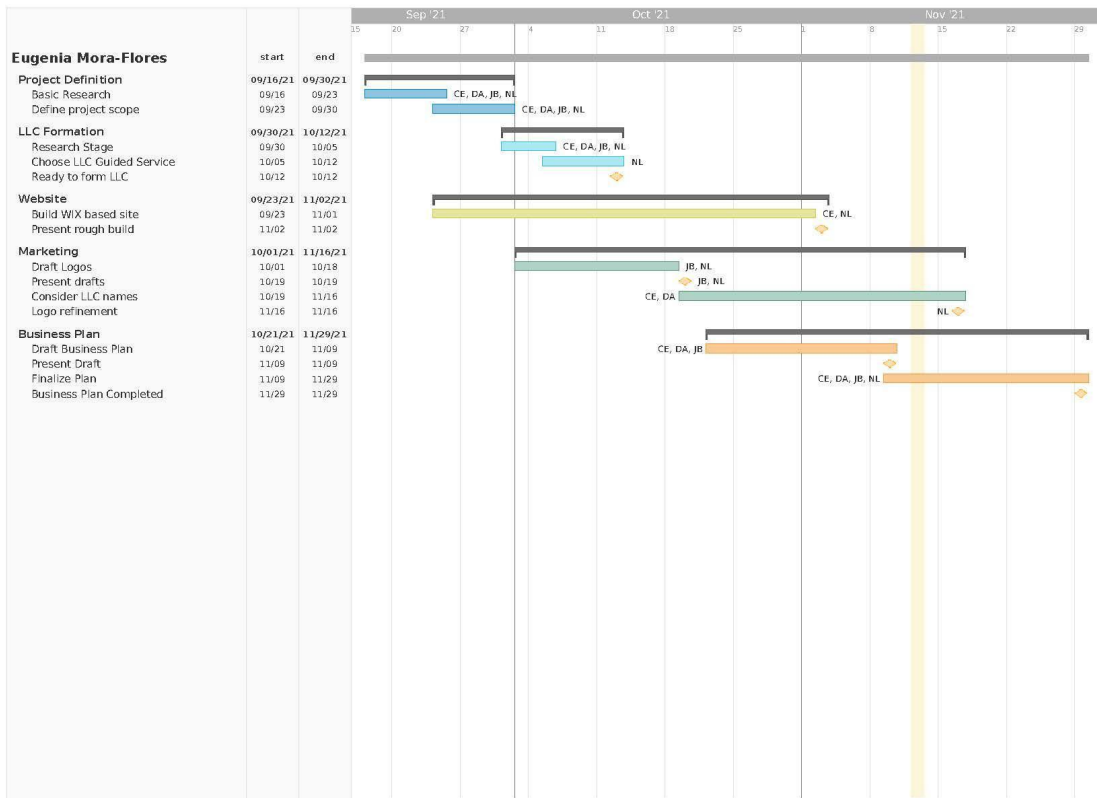
September 30, 2021

Date

Appendix B: Project Schedule



Printed: 11/11/2021



Appendix C: Mid-Project Executive Summary

Ms. Mora-Flores Executive Summary

Noah Lykins, Derek Anderson, Joshua Brisson, Cris Esparza

Goals

- The team's main objective is to convert our client's business from a sole proprietorship to an LLC. With this the team will research the necessary documents and steps required by our client in order to achieve this.
- Second, the team will help with the company's inner expansion by reaching out for administrative directors to help with scheduling and hiring, as well as team presenters for the company for further outreach to schools and districts.
- The team will help the client with website development for promotion and reference to the business. The team will create an online template that will help promote the clients existing products and programs for the company's future clientele.
- The team will develop a logo using visual editing software for client's business to help with marketing and recognizability countrywide.

Achievements

- The team completed the final prototype of the website as planned. Direct communication to Ms. Mora-Flores's administrative assistant was added to the site. A list of programs and services was displayed on the main page of the website for easy access and booking.

- A logo was developed, refined, and chosen for Ms. Mora-Flores's company. As a stretch goal we worked with Ms. Mora-Flores to register the logo with the appropriate authorities.
- The team helped Ms. Mora-Flores to create criteria for hiring an administrative director and team presenter. As a stretch goal we also worked with her to create a business plan so expansion went smoothly.
- The team listed the documentation and information required for the formation of an LLC in California. We assisted Ms. Mora-Flores in the registration process by providing a service to guide her through the process. As a stretch goal Ms. Mora-Flores was successfully able to submit her application to register her company as an LLC