

Bodhi Beard

☎ (919) 555-6724 ✉ bodhi.beard@example.com 💼 linkedin.com/example/bodhibeard 📍 Durham, NC 27701

SUMMARY

Small business advisor and former owner with 13 years of experience helping entrepreneurs and established owners make sound decisions across **venture creation**, operations, finance, accounting, marketing, and strategic growth. Provides confidential one on one counseling grounded in **concept development**, **feasibility analysis**, business planning, licensing research, budgeting, **financial forecasting**, cash flow review, and capital planning. Direct ownership experience supports practical guidance that reflects client goals, resources, operating realities, and business stage. Reviews plans and financial information, identifies risks, documents counseling activity, and connects clients with training programs, lenders, accountants, attorneys, and specialized resources. Collaborative work with founders and owners has strengthened decision quality, clarified next actions, and supported responsible growth. Ready to contribute careful judgment, empathy, and practical business insight in a part time small business coaching role.

EXPERIENCE

Senior Small Business Advisor, Client Counseling

January 2023 - Present

Triangle Venture Advisory Group

Durham, NC

Lead confidential advisory engagements for startup founders and established owners across service, retail, and professional businesses. Structure counseling around decisions, risks, financial realities, training needs, and practical next steps while coordinating referrals and maintaining accurate client records.

- Counseled founders through concept development, feasibility analysis, licensing research, budgeting, and capital readiness decisions.
- Reviewed **business plans**, **cash flow statements**, budgets, and forecasts, clarifying risks before financing or expansion.
- Advised established owners on **growth planning**, operations, pricing, marketing priorities, and management challenges.
- Recorded **confidential counseling notes** and follow up commitments in **Center IC** within required service periods.
- Connected clients with classes, lenders, accountants, attorneys, and specialized resources after assessing training needs.
- Applied business, finance, and accounting judgment while protecting **client confidentiality** throughout each counseling engagement.

Owner and General Manager, Specialty Retail Operations

March 2019 - December 2022

Oak City Market Works

Raleigh, NC

Founded and operated a neighborhood specialty retail business, owning decisions across planning, licensing, **finance**, purchasing, marketing, staffing, customer service, and orderly closure. Used direct ownership experience to balance growth opportunities with liquidity, capacity, and long term operating needs.

- Built startup plans, licensing checklists, vendor strategies, budgets, and cash requirements for business launch.
- Managed bookkeeping review, cash flow, purchasing, pricing, inventory, and expenses through seasonal demand shifts.
- Created **marketing** plans using partnerships, email outreach, promotions, and retention activity tied to sales patterns.
- Evaluated financing and supplier terms against repayment capacity, inventory needs, and working capital requirements.
- Established procedures for customer service, purchasing, cash controls, records, and consistent daily operations.
- Completed an orderly ownership transition by reconciling vendors, inventory, records, accounts, and outstanding obligations.

Business Counselor, Entrepreneur Advisory Services

July 2016 - February 2019

Carolina Enterprise Resource Network

Greensboro, NC

Provided confidential counseling for aspiring entrepreneurs and existing owners, translating business concepts and financial information into practical plans. Guided clients through feasibility, cash planning, operations, marketing, training selection, and referrals while maintaining clear boundaries around specialized professional advice.

- Counseled entrepreneurs on customer definition, feasibility, startup requirements, licensing, and written **business plans**.
- Reviewed financial projections and challenged unsupported assumptions linking revenue, expenses, cash timing, and decisions.
- Prepared cash flow exercises showing working capital needs and potential financing pressure points.
- Supported owners with structured discussions covering operations, marketing, growth choices, and follow up actions.
- Matched clients with **seminars** and community resources based on bookkeeping, marketing, lending, and regulatory needs.
- Referred specialized matters to accountants, attorneys, lenders, and other professionals with clear role boundaries.

Operations Manager, Business Services

June 2014 - June 2016

Blue Ridge Business Services

Winston Salem, NC

Managed daily operations for a small business services firm, coordinating scheduling, vendors, billing, purchasing, documentation, and service delivery. Partnered with ownership on budgets, cash activity, marketing choices, software reviews, process decisions, and protection of sensitive information.

- Coordinated scheduling, vendor relationships, billing workflows, purchasing, and service delivery across a compact team.
- Built operating budgets and reviewed income statements, highlighting obligations affecting liquidity and service decisions.

- Standardized client intake records so staff captured requirements, deadlines, and follow up actions consistently.
- Supported marketing planning through customer segments, referral partnerships, service packages, and recurring needs analysis.
- Compared software and vendor options by cost, implementation effort, and expected service impact.
- Protected sensitive client and financial information through controlled records and disciplined communication procedures.

Business Planning Associate, Entrepreneur Support

September 2013 - May 2014

Capital Launch Partners

Raleigh, NC

Supported consultants serving local entrepreneurs through business plan preparation, market research, startup **budgeting**, cash flow modeling, licensing research, and meeting coordination. Organized sensitive information into clear assumptions and practical next steps for client discussions and referrals.

- Organized customer, competitor, operating, and financial research for entrepreneur **business plans**.
- Built startup budgets and cash flow schedules under senior review, clarifying capital and monthly cash needs.
- Researched licensing and permit pathways, documenting questions for agencies and professional advisors.
- Prepared meeting materials connecting client goals with feasibility findings, financing, marketing, and operations.
- Maintained confidential files and session documentation for sensitive concepts and financial information.
- Coordinated referrals to training programs, accountants, attorneys, lenders, and industry specialists.

PROJECTS

Small Business Cash Flow Clinic 📅 2025

Created a practical workshop format using cash flow statements, budget reviews, and forecasting exercises to help owners connect daily choices with liquidity needs and financing decisions.

Neighborhood Retail Ownership Transition 📅 2022

Planned and completed an orderly business wind down, reconciling inventory, vendor obligations, records, accounts, and transition decisions with care.

LEADERSHIP & AWARDS

- SCORE Workshop, Small Business Financial Management, 2025
- Volunteer Entrepreneurship Mentor, Durham Community Enterprise Program, 2024 to Present
- MBA Academic Achievement, North Carolina State University, 2018

EDUCATION

Master of Business Administration

2018

North Carolina State University GPA: 4.0

Raleigh, NC

Coursework: Strategic planning, financial management, marketing management, operations management

Bachelor of Science in Business Administration

2013

University of North Carolina at Greensboro GPA: 4.0

Greensboro, NC

Coursework: Accounting, business finance, entrepreneurship, organizational management

CERTIFICATIONS

- SCORE Workshop, Small Business Financial Management 📅 2025
- Master of Business Administration, Business Administration 📅 2018

TECHNICAL SKILLS

- **Business Planning:** Business plans, feasibility analysis, venture creation
- **Financial Analysis:** Cash flow statements, financial forecasting, budgeting
- **Accounting Practices:** Bookkeeping review, income statements, expense analysis
- **Strategic Planning:** Growth planning, operating plans, market positioning
- **Marketing Tools:** Email outreach, local partnerships, customer retention
- **Operations Management:** Workflow review, purchasing, inventory management
- **Capital Planning:** Sources of capital, financing options, working capital
- **Client Records:** Center IC, confidential notes, client data
- **Training Resources:** Classes, seminars, college programs
- **Professional Referrals:** Lenders, accountants, attorneys
- **Compliance Research:** Licensing research, permit considerations, regulatory topics

- **Advisory Methods:** One on one counseling, structured discovery, follow up

SKILLS

- Small Business Counseling
- Entrepreneurship
- Business Ownership
- Business Management
- Strategic Planning
- Growth Planning
- Business Plan Review
- Feasibility Analysis
- Cash Flow Statements
- Financial Forecasting
- Budgeting
- Finance
- Accounting
- Marketing
- Operations Management

PROFESSIONAL AFFILIATIONS

- Durham Community Enterprise Program, Volunteer Entrepreneurship Mentor, 2024 to Present
- SCORE, Small Business Financial Management Workshop Participant, 2025
- Local entrepreneur resource network participant, connecting owners with practical education and professional referrals

LANGUAGES

- English (Native)
- Spanish (Intermediate)

ADDITIONAL INFORMATION

Work Status : Authorized to work in United States. No sponsorship required.

REFERENCES

AVAILABLE ON REQUEST