

TWO STEPS TO FIND A SERVICE PROVIDER

INTRODUCTION:

This Brief takes you through a TWO STEP PROCESS to find a Service Provider that is focused on the selection parameters that fit your situation.

The process starts with a simple “google search,” but uses some key search phrases [listed below] that will help sharpen and customize the focus of your search results.

STEP ONE: - Search Setup

SEARCH PROCESS:

- A. From the seven Service Provider Categories [in Appendix A] select the one that fits your needs.
- B. Within that category, find the detailed “search terms” that most closely reflect the type of service you need, or craft search terms that specifically reflect your need.
- C. Enter the “selected terms” into your browser [Google, IE, Chrome, ETC.]. *Note that if you use Google you will not only get the search results but typically a lot more information about an individual result when it is selected (user reviews, map to location, picture of facilities, etc..) that will be helpful in Step Two.]*
- D. BEFORE you start the search and AFTER you have entered the “search terms”, add the location of where the product/service will be used. [*This will narrow the search results to vendors near you if that is appropriate.*]
- E. Execute the search and proceed to STEP TWO below

STEP TWO – Qualification of Search Results.

- A. Look at the search results and select three of them to begin your evaluation. *[Using three will provide you variation in cost, approach, etc.]*
- B. For each potential vendor, begin your qualification process by:
- a. Selecting that potential vendor’s search result and looking at the user reviews and detailed information
 - b. Looking at the comments/qualifications as shown in: Google Reviews, Angie’s List, Trip Advisor, Better Business Bureau, etc., to gain more information about each vendor.
 - c. Calling each on the phone for a 5 minute discussion of their services and costs.
 - d. Reviewing your three selections with your SCORE counselor to prioritize which ones to begin spending more of your time with.
 - e. By far the best “qualification” of a potential vendor is your opinion when you have a face to face meeting with them.
 - f. Asking for a no cost face-to-face, 15 minute consultation in their place of business with the potential vendor to see if you feel you have a good fit with them and you are their kind of customer.
 - g. Asking each potential vendor for three references, then calling several of them.
 - h. Asking and interviewing a minimum of three current client/users of the potential vendor that your rank first, before you make a final selection.
 - i. Touching base again with your SCORE mentor.
 - j. OK you have done about as much as you can, so select one and get started.

APPENDIX – A

LIST OF SERVICE PROVIDER CATEGORIES and SEARCH TERMS

1. ACCOUNTING:

Bookkeeper, CPA or certified public accountant, Tax accountant, QuickBooks bookkeeper, QuickBooks CPA, business valuation, business broker, IRS agent

2. BANKER/FINANCING:

Personal loan, Business startup loan, Business working capital loan, Equipment purchase loan, equipment leasing, Capital purchase loan, Property purchase loan, project loan, business broker, International Letter of Credit

3. INSURANCE:

Business liability, Business buy-sell, Business car insurance, Business errors and omissions, Personal liability coverage, Key Man Insurance, Errors and Omission Policy, Group Health insurance, Group dental insurance, Workmen’s compensation coverage, IT Liability Protection, Employee benefits

4. LEGAL:

Corporate formation, LLC formation, Operating agreement, Small business attorney, Patent help, Business loan. Selling a business, buying a business, contract review, partnership agreement, purchase order terms, terms of sale

5. SOCIAL MEDIA APPLICATIONS [excluding web site issues]:

Facebook setup, LinkedIn setup, Twitter setup, Pinterest setup, YouTube setup, ETSY setup, google places, pay-per-click, google analytics management, web site update, e-commerce site, smart phone app development

6. WEB SITE APPLICATION:

Small web site development, Fix web site, Update web site, Web site e-commerce, Web site SEO, Web site Google Analytics, Web site AdWords setup, pay-per-click setup

7. COMPUTER TECHNOLOGY:

Infrastructure:

Office network, Office systems security, Office business software, PC and office network hardware, data security, disaster recovery, data backup, IT Support services, internet access vendor, phone systems, camera systems

Applications:

Accounting software, line of business software, point of sale software, email systems, CRM software, remote conferencing applications

If you would like to request a Cincinnati SCORE counselor please [click here](#).

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