

**Tamika Lewis**  
**Next Generation Graduate**  
<http://www.nextgenerationgraduate.com/>

**NEXT GENERATION**  
**G R A D U A T E**

### **Business Structure**

Sole proprietorship

### **Type of Clients Served/Niche**

I work with two sets of clients: middle-upper and low income students. In order to do so I use a sliding scale for low-resource families. My ideal client is a student/family that is motivated, appreciative, and flexible. I suppose that's everyone's dream client. I'm currently developing new products and services that would allow me to reach an even wider audience. Super excited about this!

### **My Launch Story**

I was laid off as a counselor for LAUSD in 2011 and decided to go it alone. I wrote a book called Next Generation Graduate: College Readiness for Low-Income Students and began building my business. I've since been rehired as a permanent counselor, but continue to run my consulting business on the side. I'm able to take on about 5 (comprehensive package) students per year, and still manage a roughly 300 student caseload at school, which officially makes me nuts!

### **Marketing (How Clients Find Me)**

Being a high school counselor definitely has its perks. As an IEC, it gives me more credibility with clients as well as other school counselors. I also found that my book opened doors for me as a presenter and facilitator, which is how I booked some of my first clients. I have dabbled in running FB ads, running contests, etc. and I also cross promote on other blogs. This is still a work in progress, and I have learned a great deal. For example, videos have far greater reach than anything else when it comes to attracting students. If you can create and market videos they go viral a lot faster. I also know that millennial's are now primarily on twitter, Instagram, and vine. So these are definitely the social media platforms to master. I find that my FB ads have had more success reaching parents. I did get one client from running ads, which was a \$1,500 to \$200 yield. There is a way to promote online without spending lots of money. I'd say building a list is crucial and maintaining ongoing contact with that list is even more critical.

### **Pricing Services**

This is still a pain point for me. It takes guts to charge what your worth. But I realized that the higher my prices, the more quality experiences I had overall with clients. People value things more when they come at a greater cost. For more inspiration read the Blue Ocean Strategy and Now Discover Your Strengths. The key really is to offer a service that makes you unique from anyone else, thereby eliminating competition. My unique angle is that I'm also an LCSW, so my clients and families get therapy and college guidance. Score! And sometimes they need a whole lot of therapy! I'm able to build great rapport with them and create long lasting relationships,

which means more referrals. My pay scale for packages ranges from \$800 to \$1,500. Next year they're going up.

### **Legal Stuff**

I do have a contract. I think the greatest shock I've found in this business is that people will pay you a lot of money, and yet still not follow through on basic steps to ensure best results. I like setting the terms of services guaranteed and what is expected of the client in order to see results. This way it's clear if there are any disagreements or disappointments with outcome.

### **Best Practices**

When you're starting off, I say go above and beyond to woo clients. Any personal touches, bonuses, extra time, anything you can do to create a happy client are well worth it. I also believe in good fit. Knowing your ideal client is important. This can be a long drawn out process and the last thing you want is a year stuck with a client or family you can't stand.

## Lynette Mathews The College Planning Center



### **Business Structure**

Have you ever wanted to just spend time counseling students, and leave the business efforts to someone else? No worries about liability insurance, accounting, pricing, marketing, contracts, sales, taxes, employment regulations and more?

The College Planning Center is a corporation that employs professional Educational Consultants that want to focus on educating and guiding students. The College Planners are all either full-time or part-time W2 employees that receive payroll checks with appropriate payroll taxes. The College Planning Center is a corporation. We are owned by two partners that run the business. We save about 15% in taxes over an LLC structure.

We have an innovative Center that is a gathering place for students – meetings with assigned College Planners, SAT/ACT prep, Community Service Fairs, Group Writing Workshops, Speaker Series, College Fairs, Monthly Scholarship Club and more! We do not go to client's homes or provide services outside of our Center.

### **Type of Clients Served/Niche**

The College Planning Center is what we consider a Socially Responsible For-Profit Corporation that strives to serve all types of students in our community. We work with about 500 students each year, so we see lots of variety. Each of our College Planners has an area of expertise: Student Athletes, Ivy League, Visual Performing Arts, Special Needs Students, B/C Students, Community College, Distance Counseling, etc. Although a student is assigned to a specific Planner, we often collaborate and share information and expertise.

The College Planning Center has a program to scholarship college-bound, low-income students in our community. They are nominated by the local high school counselors, teachers, and church youth pastors for pro bono services, we are known in our community for assisting foster youth, homeless, and low income students.

### **My Launch Story**

Lynette Mathews founded the company ten years ago. Lynette earned a business degree and gained business expertise in the software industry prior to earning a College Counseling Certificate from UCLA. She added a business partner, Terri Streetman, last year to help grow the organization and fulfill the vision of making college planning services more accessible to communities.

### **Marketing (How Clients Find Me)**

Location, location, location! Our first Center is located in a suburb outside Sacramento, in a high-end outdoor mall. We get walk-in and drive-by traffic from the mall as well as lots of referrals. We have developed a reputation as the Community experts through leading a Parent

Education Series at the local high schools and non-profit organizations, and publishing articles in local newspapers and magazines. We have a presence online with our website, Facebook, and Twitter.



### **Pricing Services**

We sell predominantly a comprehensive college planning service to freshman – seniors in high school. We offer hourly services for Community College and graduate students. We also sell ACT/SAT prep. We choose to do a high volume of business in order to keep our costs down and profits up!

### **Legal Stuff**

We go “all-in” when it comes to legal stuff. We have a corporate attorney, CPA, liability insurance with the added errors & omissions clause. We have a simple Sales Agreement, but choose not to call it a “contract.” Our Curriculum and marketing materials are all copyrighted, our name and logo trademarked (in process).

### **Best Practices**

In order to grow the practice, it was imperative that we “productized” our services. We authored a College Planning Curriculum that provides our students and parents with the education to empower them to make good college decisions. We see College Planning as a combination of education related to college admissions and trusted guidance. The concept of a “Curriculum-based service” has allowed the organization to grow by:

- Delivering a high level of quality and consistent message among College Planners
- Providing tangible deliverables at each step of the process
- Allowing for ease of training new College Planners
- Offering families a roadmap of services and defines the deliverable

The College Planning Center has a separate profit center that sells, supports, and offers training on the Curriculum to High Schools, Non-Profit Organizations and Educational Consultants.

Lynette Mathews - The College Planning Center - [LMathews@TheCollegePlanningCenter.com](mailto:LMathews@TheCollegePlanningCenter.com)

**John Raftrey**  
**Raftrey College Advising**  
<http://www.johnraftrey.com/>



### **Business Structure**

Sole Proprietor. Income, expenses and Taxes reported on my 1040. Separate credit card for business expenses.

### **Type of Clients Served/Niche**

Upper Middle Class Silicon Valley families that generally don't apply for financial aid. My students have a wide range of academic performance. I do not focus on the high end, upper class families who are well served by counselors that focus on the "Tiger Mom" market. I do have special expertise for students who want to play their sport in college. However, given the high academic focus of Silicon Valley students, sports are more of a hook to help get into a selective college, than a first step to a professional career. Most students are focused on the west coast and many don't want to leave California.

### **My Launch Story**

Started working with my own 3 sons, and branched out to immediate circle of friends. Took UCSD College Counseling Certificate Courses. Left a high tech career to launch and run this business full time. I now work mostly with families I do not know and only a few families who are friends.

### **Marketing (How Clients Find Me)**

Marketing resembles a grass roots political campaign. The more people I meet, the more business I get. My main networking is through organizations that know me well: the Intel Alumni Network and the Palo Alto Soccer Club. I give an annual presentation to both groups and friends have also invited me to speak to other groups. My focus for 2014 is on getting more involved with my college alumni groups, Michigan and Columbia. I have also gotten business from my LinkedIn profile and my website. I consult with other college counselors on their students who want to play their sport in college. Independent counselors have referred students to me when they are full. Happy families recommending me to their friends is growing and it is the best marketing promotion. I've just starting writing a blog with Lori McCormick, Thinking About College, for the Palo Alto Weekly. Check it out at <http://www.paloaltoonline.com/blogs/>

### **Pricing Services**

I charge an hourly fee for consulting with 8th through-11th graders. Once the real work begins in summer before senior year, I charge a flat fee for all services connected with the college admission process from July through January. I'd be happy to discuss pricing specifics with anyone who would like to have a conversation. My prices are low compared with the geographic market I am in, but I believe there is a large underserved population of families in the \$1,000 -

\$3,000 range who have realistic expectations regarding the top competitive schools and consequently are easier to work with than the high value, high expectation families.

### **Legal Stuff**

Professional Liability Insurance through Forrest T. Jones. <http://www.ftj.com/EducatorLiability>. I think it would be helpful to have a legal seminar at every conference!

### **Best Practices**

#### Go all in

I have found it very hard to launch a new business. So you have to jump in with both feet. I don't think you can have a "day job" and start a counseling business. My business started to grow after I left my high tech job. You have to believe in yourself. My informal poll of college counselors, stockbrokers, insurance agents and real estate agents shows that it takes 3-5 years to actually have an ongoing business. Perseverance is key.

#### Do the minimum to launch

I learned this from while I was consulting with a start-up. You don't need everything to go into business. Job 1 is to get the first paying clients. You can do this with almost no infrastructure. You don't need college counselor software, a website, blog, newsletter, business bank account, business credit card or a logo. After a bunch of people pay you, you will need most of these!

#### Disappoint early and often

It's not fun telling a second semester sophomore that his 2.9 means he won't be going to Berkeley or UCLA even though still he has two and a half years of high school left to improve. I spend a lot of time having them find safety schools. I am paranoid that I will have a student who doesn't get in anywhere because he aimed too high. I don't want to have a discussion with a family that paid me real money and whose child didn't get into college.

**Archana (Archie) Sudamé**  
**Admission Crew**

<http://www.admissioncrew.com/>



**Business Structure**

- LLC (Limited Liability Company) with husband as my business partner
- Independent associates with contracts: W-9.
- Time commitment: full time. Associates are on a part time basis.
- Areas of expertise: General, STEM, Learning differences (LD) and Liberal Arts, and FAFSA. All associates have a UC Berkeley Extension certificate; understand basic college advising but also some unique expertise.

**Type of Clients Served/Niche**

- Practice is limited to the STEM (Science, technology, Engineering and Math) and business majors. Associates are more versatile. I am comfortable in my narrow niche because of my own background (Ph.D. in Biological Sciences).
- Lived on the East Coast and in California, in Texas, and Florida. Visited 168 colleges/universities to this date.
- Select 25-30 rising seniors to work with each year—number is limited based on a good fit. Although, 80% of my clients are Asian Americans (mostly Asian-Indians/Chinese), approximately 5-6 clients fit the stereotype of being exceptional or high achieving. Most students are mid-C to high B students.

**My Launch Story**

- I had been helping 3-5 students each year since the year 2000-01.
- I was also teaching Biology as an Adjunct at Santa Clara University and helping some of my undergrads with med school and grad school applications--while simultaneously helping their younger siblings with college applications or coursework selection/activities selection.
- After having a baby in 2008, I realized that teaching at Santa Clara offered me very little flexibility.
- Finally I decided to do the UCBx College Advising course in 2009-10 (a friend recommended) and I got some formal background in college advising.

## **Marketing (How Clients Find Me)**

- External reader for Santa Clara's EA and regular season in 2011-12
- I worked pro-bono with a high school counseling office for 2 years. This is the largest high school in Northern California.
- I shadowed a transfer counselor at our local community college for a semester to understand the community college transfer process.
- Progressive and slow growth in practice. We are selective about who we work with. 2014-15: 35 rising seniors.
- I have an office suite in the central area (business area) of my city i.e. Fremont, CA. Clients come to me. I do not go to their home.

## **Pricing Services**

In the first year, I did a local event at a community center. I advertised it in the local news-papers and on Facebook.

## **Legal Stuff**

We carry a professional and general liability insurance. The professional liability is also called E&O. We work with a business attorney for creating contracts. We also work with a CPA.

## **Best Practices**

Good contract is essential

- NACAC SPGP. Ethical code
- Comprehensive contract is essential
- Having your advising philosophy in writing helps.
- Proper business plan also helps--with goals and mission statement.
- Slow and steady growth with some selectivity. Word of mouth helps.
- Giving people some idea about the correlation between # of hours and the fees that they pay gives them an understanding of how our work will be distributed.
- Constantly updating our knowledge via conferences, educational webinars and practical opportunities



**Wei-Li Sun**  
**AskMsSun.com**  
<http://askmssun.com/>



### **Business Structure**

I'm a sole proprietor, I looked into incorporating but the tax liability in my city (Los Angeles) makes it not worthwhile unless I break \$100k per year.

### **Type of Clients Served/Niche**

I only serve students who apply to undergraduate programs at the UCs (high school and community college students). I always get asked how I could make a business out of such a narrow niche, but I think I'm successful because of it. I'm the only person online who's talking about UC admissions nonstop, so anyone spending a decent amount of time Googling about UC admissions will eventually find me. Last year (2014 application cycle), I had 28 students applying, and the year prior, I had 37 students; so having a narrow niche is not a limitation but an asset (I bumped my fee up by about 25% between last year and the year before in an effort to reduce the number of clients I was getting).

### **My Launch Story**

I started volunteering with Cal as an alumni ambassador at high school college fairs in 2005 and I was absolutely horrified by how uninformed some students were on preparing for the UCs. To remedy the situation I started a blog, because that was the thing to do back then, and eventually I had a following and students/parents began asking for one-on-one help. When I was laid off from my full-time work in 2009, I officially launched a consulting business.

### **Marketing (How Clients Find Me)**

I utilize a new form of marketing (I think someone is writing a book about this phenomenon): online experts. It's free but time consuming. I still spend a lot of time answering questions for free online (I used to be on Yahoo! Answers, then on College Confidential, now I'm on Ask.fm, and I'm looking into moving to Quora; I go where the students are). I also publish timely advice, updates, and reminders through a variety of social media platforms (LiveJournal, Facebook, Google+, Tumblr, LinkedIn, Twitter; I just got sucked into all of the available channels and now I have enough following on them that I can't turn them off).

### **Pricing Services**

I spent years regretting not charging more because I always do 4 to 5 times more work than I'm being compensated. I look at it as "under-promise and over-deliver" but quite frankly I'd rather be properly compensated.

The best advice I ever heard about pricing came from a friend who was a career coach and also an entrepreneur: whatever number you come up with, double or triple it (this applies to those new to the profession). Every entrepreneurship book I read said that people start out

undercharging, it's a pervasive phenomenon across ALL industries. If you don't come up with a high number, you'll just regret it later.

Few things to keep in mind when you start out: 1) the more you charge, the better clients you'll get (true across all industries); 2) we are in an industry of one-time purchases, so adjust your prices every year if you need to (I do!); 3) if you can differentiate yourself (for example, I only do the UCs), you can pretty much charge whatever you want (it's like shopping for mattresses, no two are alike so you can't comparison shop); 4) there are plenty of pricing research available, I recommend *Priceless: The Myth of Fair Value (and How to Take Advantage of It)* by William Poundstone (yes, it's a little dry, but it's got everything you could possibly want to know about pricing and then some) and *Bargain Fever: How to Shop in a Discounted World* by Mark Ellwood (it's got more updated research and from a consumer perspective than the Poundstone book; it's not written as a pricing book per se, so you kind of have to dig for the lessons to take away).

### **Legal Stuff**

I did a survey as part of my UCSD College Counseling certificate program asking 19 consultants about whether they have a contract/agreement in place and if they thought it was important to have (also if any disputes ever arose that required legal action; the answer was no across the board to that question). I ended up deciding that the benefit of having one didn't outweigh the drawbacks (like firing clients at will; more on that later).

I started carry liability insurance when my fees went above \$1,000. For the most part, it's really just CYA. Since I have no overhead, I can always just refund part or all of the money if a client got really annoying.

I'm married to an attorney so he takes care of all of the legal stuff.

### **Best Practices**

It's ok to fire clients! The energy and time you spend dealing with problem clients can be better spent on finding good, non-whiny clients who are willing to pay promptly.