



bookkeeper  
**LAUNCH**

PRESENTS



**THE BOOKKEEPER LAUNCH**

COURSE SYLLABUS



## A LIFE YOU ABSOLUTELY LOVE



**Hey, Ben Robinson here.**

In this document, you're going to discover what's waiting for you inside of your Bookkeeper Launch education center.

Bookkeeper Launch is made up of 4 main sections, each focusing on the 3 key areas of learning: Skills, Clients, and Systems.

**SECTION #1 - 21ST CENTURY BOOKKEEPING SKILLS** is all about becoming a high quality bookkeeper.

**SECTION #2 - 21ST CENTURY CLIENTS** is where you'll get your first handful clients to get your business off the ground.

**SECTION #3 - 21ST CENTURY BUSINESS SYSTEMS** is where you'll develop the systems you'll need to succeed (and run your business day-to-day.)

**SECTION #4 - CLIENTS (ADVANCED)** is perfect for when you're ready to grow your business and need.

**Let's dive into the specifics of each Section...**



## SECTION #1 - 21ST CENTURY BOOKKEEPING SKILLS



### Overview

The first thing that we're going to cover is skills. Remember when we looked at the hierarchy of bookkeeping, it starts with the foundational elements and transactions and then we move up from there to preparing the financial statements, and then to interpreting and advising.

Those are 21st Century Bookkeeping skills and they can help isolate you from the coming automation and artificial intelligence. Everything in here is getting you to the 21st Century level of bookkeeping.

### What You'll Learn

- The 21st Century Bookkeeping Skills you need to wow your clients
- How to clearly understand the role of a 21st Century Bookkeeper in the modern business landscape
- Everything you need to know about the 3 most important financial reports: Balance Sheets, Income Statements, Statements of Cash Flows
- How to deliver beautiful financial reports that will blow the competition away (most bookkeepers only share ugly spreadsheets... I'll show you how to package your work in a way that will impress your clients)
- How to give your client hope for a better financial future
- My proven system for doing "clean up" on a client's books (this will help you wrangle even the most chaotic financial mess into a neat, organized report that will make your clients ask "How did you do that?!")



## SECTION #1 - 21ST CENTURY SKILLS



### Foundations

- Bookkeeping Basics
- Financial Statements
- Journals & Ledgers
- Ethics & Laws



### Setup

- Setup & Software
- Example Client Setup



### Transactions

- Cash Receipts and Accounts Receivable
- Cash Disbursements and Accounts Payable
- Inventory
- Fixed Assets
- Notes Payable
- Other Liabilities
- Other Assets
- Equity
- Bank Feeds and Reconciliations
- Closing Project
- Final Project



### Statements

- Proof
- Prettify
- Package
- Present



### Cleanup

- Cleanup Process
- Analyzing the Statements
- Transaction & Bank Cleanup
- Bank Reconciliation
- Accounts Receivable
- Inventory
- Undeposited Funds
- Fixed Assets
- Accounts Payable
- Other Liabilities
- Opening Balance Equity



### Interpret & Advise

- Review & Analyze
- Internal Controls
- Income Taxes



### Overview

Now we move over to clients because great skills without clients isn't a business, it's a hobby.

So we want to make sure that you go out there and get clients... and get them in the most effective, proven ways. That's what 21st Century Clients is all about; the best way to get those first handful of clients.

### What You'll Learn

- The difference between busy vs breakthrough marketing work (and why you need to spend as much time as possible doing breakthrough work!)
- How to define your "ideal target market" in a way that sets you up for short-term and long-term success
- How to get inside your prospective client's head and understand what they're REALLY looking for
- The #1 mistake people make with their business card (this costs them lots of clients)
- The 3 stages of professional relationships...and how to quickly progress through them seamlessly
- Word for word scripts to use at a networking conference so you come across as professional, likeable and non-salesy!
- The secrets to coming across as confident in a professional setting (even if you feel terrified inside)
- How to craft a marketing and sales message that will make prospective clients EAGER to work with you
- The BEST place for you to find new, high-quality clients who will line up to hire you
- The 10 rules of pricing -- and why ignoring them is at your own peril!
- How to send proposals that your prospective clients will LOVE (and buy from)



## SECTION #2 - 21ST CENTURY CLIENTS



### Get Ready to Earn

- Marketing 101
- You're a Business Owner!



### Yakkity Yak

- How to Yakkity Yak
- Yakkity Yak - Take Action
- Feel the Fear
- 20X5 Challenge



### Networking

- How to Network
- Mix & Mingle
- 3 Stages of Professional Relationships
- Networking - When and Where
- What do you say?
- Networking - Take Action
- The Secrets of Confidence



### Irresistible Selling Statement

- What is an Irresistible Sales Statement?
- Crafting Your Irresistible Sales Statement
- Features vs. Benefits
- Benefit Brainstorming
- Irresistible Sales Statement Examples



### Specialized Groups

- Where's the Party?
- Specialized Groups - When and Where
- How to contribute
- Give to Get
- Move the conversation offline
- Getting Success - Interview with Callie



### Consult to Close

- The Consultation
- Understanding Your Prospect
- Consultation Questions
- Reviewing the Books & Pricing
- Proposal & Engagement Letter



### Overview

Next is systems. Remember, systems = sanity. Systems ensure that you get the job done as quick and efficient as possible. We want to make sure that you're doing the right things, which is effectiveness, and we want to make sure you're doing those right things efficiently.

The first lessons in systems are all about Lifestyle. The reason we have it first is because you want the 3-F Lifestyle. That's why you're doing this business, to create that life of freedom, to create that life where you don't have to choose between family and finances.

### What You'll Learn

- How to set up and manage your business in order to create your 3F Lifestyle
- Strategies for handling your money as a business owner (rather than an employee)
- My proven "business launch" checklists and templates to make you confident that you're ready to hit the "GO!" button with your business
- "The Breakthrough Framework" for getting more done (in less time)
- Secret "lifestyle management" hacks of 21st Century Virtual Bookkeepers
- How to bootstrap your bookkeeping business, so you have more money available for family life
- Key tools and technology to help you run an efficient bookkeeping business



## SECTION #3 - 21ST CENTURY BUSINESS SYSTEMS



### Lifestyle

- Your Lifestyle Framework
- Breakthrough Framework
- Your Time
- Your Calendar
- Over-Delivery vs. Doing Too Much



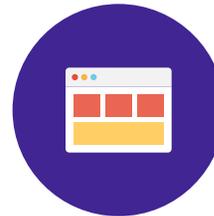
### Processes & Checklists

- Key Processes and Checklists



### Your Money

- Money Truths
- Getting Strategic
- Bootstraps & Budgets
- Business Bank Accounts
- Your Income Taxes



### Templates

- Essential Templates



### Tools & Tech

- Helpful Tools & Tech



## SECTION #4 - CLIENTS (ADVANCED)



### Overview

Once you've onboarded your first few clients, you are ready for Clients (Advanced). I've seen too many people take way too long to get their first clients because they try to START with fancy marketing before they've done the basics. I highly recommend that you ignore this section until you've gotten a handful of clients and you are ready to take your business to the next level.

Clients (Advanced) gives you multiple strategies to not only help you attract clients, but to have potential clients reaching out to YOU!

### What You'll Learn

- The 8 simple steps to set up your website all by yourself (no technical geniuses or advanced degrees required!)
- A simple prospect "follow-up" system to ensure that you never let a hot prospect off the hook
- The best strategies for effective email marketing
- How to make referral marketing the #1 generator of business for you
- How to engage with prospects online (and then seamlessly take the conversation offline in a way that they appreciate and engage with)
- The BEST way to use LinkedIn to get high-quality bookkeeping clients
- How to develop a niche that will make hiring you as a bookkeeper the "no-brainer" choice to clients in your niche



## SECTION #4 - CLIENTS (ADVANCED)



### Get Your Website

- Website Setup
- Website Customization



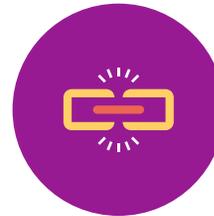
### Referral Marketing

- Effective Referral Marketing
- Referral Partners
- Referral Marketing Resources



### Prospect Follow-Up System

- Gather Intel
- Prioritize & Follow-Up
- Tools



### LinkedIn

- Effective LinkedIn Marketing
- Content & Engagement
- Lead Generation
- LinkedIn Accounts & Live Training



### Email Outreach

- Using Email Outreach
- Implementation
- Email Writing Tips



### Niches

- Your Niche
- Avatars



# FULL ACCESS TO THE BOOKKEEPER LAUNCH RESOURCE LIBRARIES



You also get access to the extensive Bookkeeper Launch “Resource Libraries”, which include guides, templates, technology recommendations and worksheets you need to start your successful bookkeeping business.

For example, in Hacks & Facts you’ll hear from other students who have had resounding success with Bookkeeper Launch. Our students Open the Kimono so to speak, and let you know, hey, here’s what I experienced, here’s how I succeeded.

We also have the Profit Maximizers bonus. We show you valuable additional services you can offer your clients, and they are very powerful. That’s why we call the Profit Maximizers. Profit Maximizers for you, value maximizers for your client.

## What You Get

- Tested and proven templates for Proposals, Engagement Letters and other key marketing materials so you can be confident in your sales process
- Results-Oriented Checklists for your key systems to make sure you don’t miss any important details
- Interviews with successful students on how they overcame key challenges in their journey so you don’t have to run into the same pitfalls
- Study hacks to show you the most effective learning methods so you can acquire your new bookkeeping skills as quickly as possible
- All library materials are based on what’s working NOW for the most active and successful bookkeeper
- Special software and tool recommendations for a virtual bookkeeping business, so you can be efficient and maximize your free time
- Quizzes, tests and final exams so you’ve proven that you know what you’re talking about



When you are ready  
to get your business  
started, simply follow  
our step-by-step plan to  
have your business  
set up in 7 days!



## What You Get

- My “business launch” plan that will show you how to legally form your business in 1-week FLAT
- Important tax setup information that you don’t want to make a mistake with
- A list of all of the licenses and permits that you’ll need to get (plus, a guide to help you get them all)
- The best way to setup your bank and merchant accounts so you can get paid (plus a handful of crucial mistakes that some people make while setting up their bank accounts!)
- How to onboard a client safely and smoothly



SUPPORT: GET HELP EVERY STEP OF THE WAY



## Hit a Roadblock or Challenge Along The Way?

## The Student Success Team Is Here To Help



When you join Bookkeeper Launch, you'll get immediate and direct access to the Student Success Team (SST).

The Student Success Team is there to help and assist you however they can in achieving your goal of becoming a bookkeeping professional.

You'll get direct access to the team through:

- **2 Weekly Live Q&As** - Each week we hold a Live Course-Specific Q&A and a Live Client-Specific Q&A. Join us to get the help you need to work through any specific questions, challenges, or opportunities you have.
- **Unlimited Email Support** - Perfect for any questions that come up that you need a more detailed or immediate answer to. While our response times can vary, our typical response time is 72 minutes during business hours, and we average a happiness rating of 97% (according to our customer service software reports)!

Some of the SST are past students who have become successful bookkeepers. Others are seasoned bookkeeping professionals who bring their years of experience to every interaction.

They've been in your shoes. They all started with zero clients. And they know what it takes to build a bookkeeping business from the ground up.



## LEGAL LUNCH

When we analyzed the costs involved in starting a bookkeeping business, the LARGEST expense was hiring a lawyer for a legal consultation on how to set up your business.

It can cost up to \$500 per hour to get answers to your questions about forming a legal entity.

So, I asked...what if I took on the cost as part of the program, and help you save \$500?

That's the idea behind Legal Lunch.

## What You Get

- Each month I invite a specialist lawyer into Bookkeeper Launch for a consultation call. You can ask any questions you have, live on the call, about setting up your business.
- This way you can save time AND money. The lawyers I bring in are highly qualified. They know EXACTLY what's involved in starting a bookkeeping business, and it won't cost you an extra penny!
- Of course, you should consult an attorney in your state to assist you as needed, but this has been a big help to our students to get some basic questions answered first.



# YOUR TRIBE AT “BL FAMILY”



## Overview

Something my students tell me, which I’m very proud of, is that the greatest support group **they have access to is our BL FAMILY community.**

They all point to this group as the “go-to location” to get the help and support they need...



I’m proud to say that one of the BEST resources inside of Bookkeeper Launch is the private Facebook community.

**This is our VIBRANT community of over 5000** students, graduates, and instructors, all full of encouragement, answers, and “been there, done that” wisdom.

Once you join, you’ll immediately surround yourself with the best and brightest bookkeeping business owners out there.

## What You Get

This is an exclusive community and only available to students of Bookkeeper Launch. Inside you’ll be able to:

- Discover what’s working for other bookkeepers, and learn from their failures and successes,
- Find encouragement and inspiration.
- Get answers to any challenges you have,
- Discover new opportunities for your bookkeeping business,
- Share what’s working for you.
- Share your successes (we LOVE to celebrate with you when you get your business set up, your first consultation and get your first client)

Even though the Bookkeeper Launch program is a powerful business launching program, the real power for your success is inside this community!

What would it mean to have 24/7 access to a group of supportive peers who are already successful 21st Century Bookkeepers and want to help you succeed?

Imagine having a dedicated group of fellow professionals that you can turn to when you need answers fast...

Imagine a network of trusted colleagues who are at your disposal 24/7...

Now, imagine they’re the friendliest and most supportive group of individuals you’ve ever met...

...all of whom share your passion for achieving a life of freedom, family, and finances!

That’s what’s waiting for you inside of our active members’ community. The largest community of its kind.



## GUARANTEE



Remember: when you join Bookkeeper Launch, you're covered by our unconditional, money back guarantee.

I want to make this decision as simple as possible for you by removing as much risk as I possibly can.

### **Our IRONCLAD 30-day “No Questions Asked” Money Back Guarantee**

Simply put: when you join us...if you ain't happy, I ain't happy. Whether that's 29 minutes or 29 days after you join...

When you are a part of Bookkeeper Launch, I want you to be absolutely thrilled with the program. I therefore guarantee that after your purchase, if you aren't completely satisfied with the program (for any reason whatsoever) you can request a full refund within the 30 day refund period.

If you're not satisfied, simply click the Cancel button within 30 days of purchase and we'll promptly return every last cent of the investment you made, with no questions asked.

Although we are generally able to respond within a few hours during normal office hours, please allow 1 business day for your refund to be processed and confirmed.