



**BOOKKEEPER**  
BUSINESS LAUNCH

PRESENTS

# 90 DAYS TO SUCCESS



This 90 Day Success Plan will be your roadmap through the first levels of the 21<sup>st</sup> Century Bookkeeping Hierarchy. You will learn the foundational elements of bookkeeping, transactions, and statement preparation. You will also learn the best, most efficient ways to land your first few clients.

## DAYS 1-15



### SKILLS: Foundations Unit

- Start Here
- Bookkeeping Basics
- Financial Statements, Journals & Ledgers
- Ethics & Laws



### BONUSES: Hacks & Facts Unit

- Introduction to Hacks & Facts
- Speed of Implementation
- Handling Overwhelm

# DAYS 16-30



## SKILLS: Setup Unit

Setup Introduction

Quickbooks Setup -  
Luxury Landscapes



## SKILLS: Transactions Unit

Cash Receipts &  
Accounts Receivable

Fixed Assets

Cash Disbursements  
& Accounts Payable

Notes Payable

Inventory

Other Liabilities

Bank Feeds &  
Reconciliation

Other Assets

Equity



## CLIENTS: Get Ready to Earn Unit

Marketing 101

You're a Business Owner!



## CLIENTS: Yakkity Yak Unit

How to Yakkity Yak

You Can Do It!



## SYSTEMS: Lifestyle Unit

Framework

Your Time



## BONUSES: Hacks & Facts Unit

Busy vs. Breakthrough

Your First Client

# DAYS 31-45



## SKILLS: Transactions Unit

Closing Project



## SKILLS: Statements Unit

Proof

Package

Prettify

Present



## CLIENTS: Networking Unit

How to Network

Mix & Mingle



## CLIENTS: Irresistible Selling Statement Unit

ISS Introduction

Creating Your ISS



## SYSTEMS: Your Money Unit

Money Truths

Getting Strategic

# DAYS 46-60



## SKILLS: Cleanup Unit

Cleanup Process

**Take time to review because now it's time for...**



## SKILLS: Final Exams Unit

Knowledge Exam

Practical Exam



## CLIENTS: Specialized Groups Unit

Where's the Party?

Get In There!



## CLIENTS: Consult to Close Unit

The Consultation

Proposal &  
Engagement Letter

Reviewing the Books  
& Pricing



## SYSTEMS: Processes & Checklists Unit

Key Processes & Checklists



## BONUSES: Hacks & Facts Unit

How to Know When You Are Ready

# DAYS 61-75



## Get your Quickbooks Online Certification

Get your Quickbooks Online Certification



## SYSTEMS: Templates Unit

Essential Templates

# DAYS 76-90



## SYSTEMS: Tools & Tech Unit

Helpful Tools & Tech



## RESOURCES: Launch Your Business Unit

Setup 7

The remaining lessons are designed to be completed AFTER you have obtained your first few clients. Once you achieve the milestones below, these advanced concepts will push you further up the 21<sup>st</sup> Century Bookkeeping Hierarchy toward The Most Trusted Advisor status!

## Milestone One

After you've onboarded your first client & have completed 2 months of statement preparation for that client...



### SKILLS: Interpret & Advise Unit

Review & Analyze  
Internal Controls

Income Taxes

## Milestone Two

After you have 3 or more clients...



### SKILLS: Clients: Advanced Unit

Get Your Website

Referral Marketing

Prospect Follow-Up  
System

LinkedIn

Email Outreach

Niches



### BONUS: Profit Maximizers

Profit Maximizers