

More Income. More Impact.



Stage A Business Breakthrough With Online Learning  
Linda Keith CPA CSP  
Canadian Association of Professional Speakers  
Saskatoon

While you wait, please enter your name, connect to audio and start chatting!



Click on the person icon and your name (Viewer #) is first on the list. Double-click on the name or hover over and select 'change my name'. Enter 'first and last name - two word description'. Example: Linda Keith - Credit Trainer

Call by phone may be better audio. Or Call by computer and adjust your microphone and speakers on this panel. Mute yourself and/or use headphones for less echo.

CHAT where you are today and what is your burning issue. CHAT to Jen if you need help.

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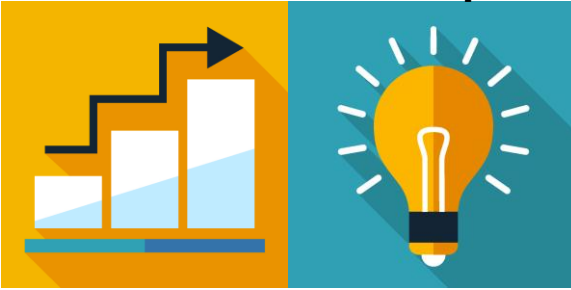
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More Income. More Impact.



Stage A Business Breakthrough With Online Learning  
Linda Keith CPA CSP

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WHAT ARE YOU EXPECTING?



**Business Growth, Innovation, Marketing and Sales Presentations with Impact, Interactivity and Idea-Oriented Action Steps to Increase Results!**

What makes Ford the top-choice speaker for companies as diverse as Liberty Mutual, IBM, and Subaru? Ford uses a fun, interactive style to engage audiences with his valuable business wisdom. Participants leave Ford's session with tons of ideas and ready-to-implement action steps to produce immediate results. Whether Ford is delivering a keynote address, giving a full-day session, or leading a breakout session, your organization will be all-ears for his most requested topics.

Download Ford's Speaker Preview Packet

Enroll or Log-in at [www.LendersOnlineTraining.com](http://www.LendersOnlineTraining.com) • Call 360-455-1569

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THREE POSSIBLE OUTCOMES:

1 ACTIONABLE INSIGHT

You identify an opportunity to add online learning or change your online learning offering and take steps to pursue it.

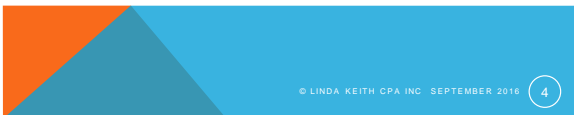
2 CHECK-UP GOES WELL

You conclude that you already do a good job with online learning and need to change nothing.

3 REJECT THE CONCEPT

You learn more about what it would take and reassess whether this is a direction you should go in.

Horizontal lines for notes corresponding to the three outcomes.



PLAN FOR TODAY

1 DECIDE WHETHER AND HOW WITH LEVERAGE AND SCALE

2 WALK-THRU OF LENDERS ONLINE TRAINING

3 CHOICES FOR DEVELOPMENT AND DELIVERY

4 SALES AND MARKETING

Horizontal lines for notes corresponding to the plan for today items.



CHAT in: Are you currently selling online learning?

Please type:

- Not yet, just looking.
- Not yet, but plan to.
- Yes, some.
- Yes, quite a lot.
- (Or something else.)

Horizontal lines for chat responses.

- 1 DECIDE WHETHER AND HOW WITH LEVERAGE AND SCALE
- 2 WALK-THRU OF LENDERS ONLINE TRAINING
- 3 CHOICES FOR DEVELOPMENT AND DELIVERY
- 4 SALES AND MARKETING

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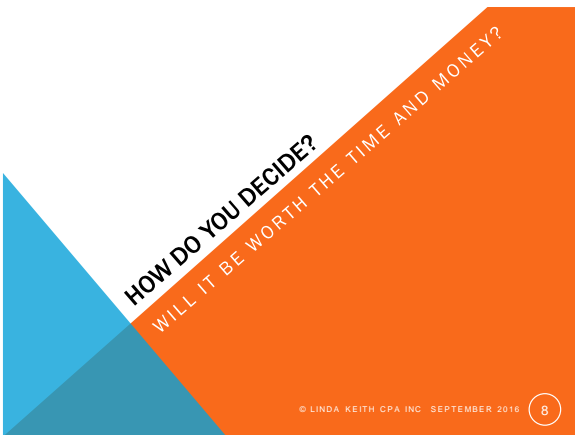
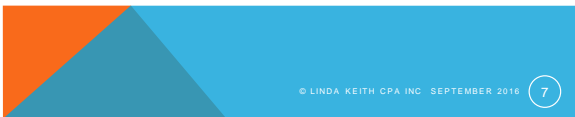
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HOW DO YOU DECIDE TO ADD ONLINE LEARNING ?

- ① Existing content **that is yours**
  - Speech, Training, Consulting, Book
- ② Existing market
  - Corporate – Following
- ③ Do you have the resources?
  - Can you reuse/modify something?
  - What is your time/money trade-off?

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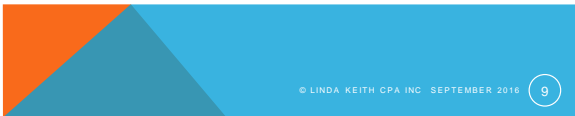
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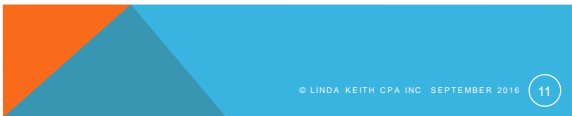
What prompted you to consider or develop online learning?

Horizontal lines for taking notes.

# The Multiplier Factor

*Leverage... (Re)Use something to maximum advantage*

Use leverage to decide what to pursue.  
Use leverage to decide how to proceed.



**Before**

**Tax Return Analysis in a Tough Lending Environment**

- Breaks the tax return down to find all add-backs
- Spot and make it not flag to avoid problem loans
- Dig for clues to find nonreporting or incorrect add-backs
- Ask good questions to get the story behind the numbers
- Make good decisions on loan and restructure requests

**Open Enrollment Workshops**

Burlingame CA	Oct 12 & 13, 2011
Pasadena CA	Oct 19 & 20, 2011
Anaheim CA	Oct 25 & 26, 2011
Portland OR	Dec 6 & 7, 2011
Seattle WA	Dec 13 & 14, 2011

**What You Learn**

- How to find all add-backs and 1099 forms
- How to spot and make it not flag to avoid problem loans
- How to dig for clues to find nonreporting or incorrect add-backs
- How to ask good questions to get the story behind the numbers
- How to make good decisions on loan and restructure requests

**Make Good Loans. Make More Loans. Tax Return Analysis**

- Understand all add-backs and 1099 forms
- Understand how to spot and make it not flag to avoid problem loans
- Understand how to dig for clues to find nonreporting or incorrect add-backs
- Understand how to ask good questions to get the story behind the numbers
- Understand how to make good decisions on loan and restructure requests

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Horizontal lines for taking notes.

**Next 35 Modules**  
30-minutes-or-less



Open Enrollment Workshops	
Burlingame CA	Oct 12 & 13, 2011
Pasadena CA	Oct 19 & 20, 2011
Anaheim CA	Oct 25 & 26, 2011
Portland OR	Dec 6 & 7, 2011
Seattle WA	Dec 13 & 14, 2011

Photo credit: Linda Keith



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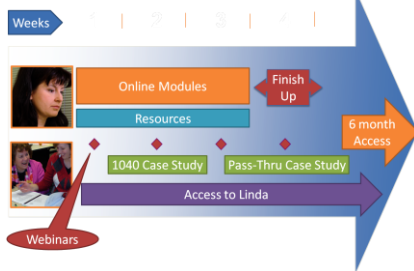
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**Now**

www.LendersOnlineTraining.com ~ VIRTUAL CLASS

- What elements did I already have?
- What did I have to create or modify significantly?



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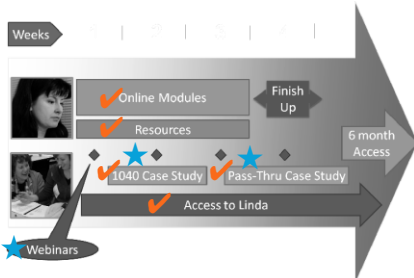
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TAX RETURN ANALYSIS ~ VIRTUAL TRAINING TIMELINE ~ LINDA KEITH CPA

- Put a check mark next to elements I already had
- Put a star next to elements I added



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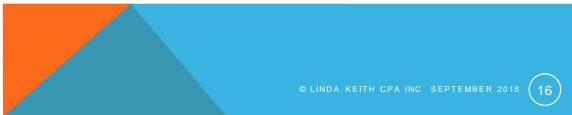
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### Leverage HOMEWORK

**List everything you already have that you can leverage into online learning content.**




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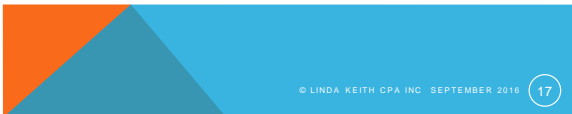
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## The Acceleration Factor

**Scale...** Allow for growth by planning for it

Decide how to handle ten times the volume.  
Design to scale up from the very beginning.




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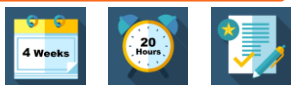
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### Your training choices

Modules, print resources, live webinars  
All participants of Lenders Online Training have access to over 30-35 minutes of live modules on tax return and financial statement analysis. Each module includes a 4 page handbook to complete and have on reference. And participants are invited to our monthly interactive webinars.

#### Online classes

If you or your team work better with more structure and accountability, the virtual class provides it. In about 20 hours over a four-week period, you choose between tax return or financial statement analysis. **Class case studies are submitted and then personally reviewed by our team.**




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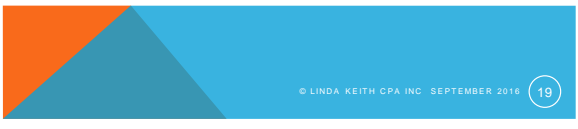
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# The Acceleration Factor

**Scale...** *Cause something to move faster*  
*Allow for growth by planning for it.*  
*Gain more income or impact from the same effort.*  
*Get out of your own way.*




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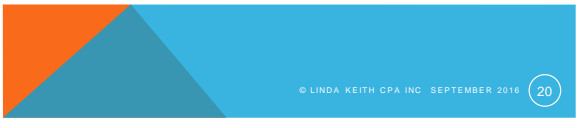
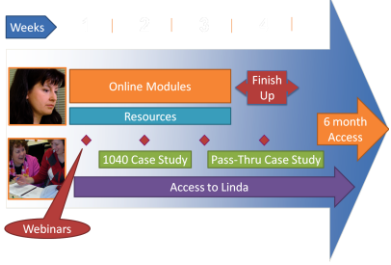
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## WHERE ARE THE CHALLENGES TO SCALE?




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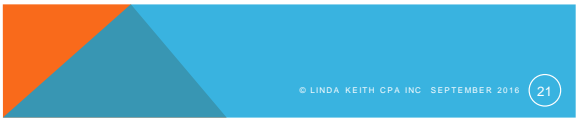
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## WHERE ARE THE CHALLENGES TO SCALE?

### Webinars Prefer <20 attendees

- Add webinars
- Hire someone else
- Restructure to accommodate 20+




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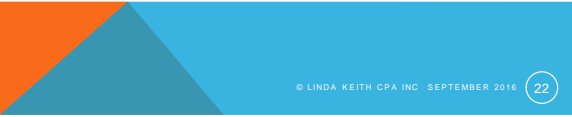
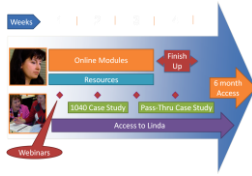
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WHERE ARE THE CHALLENGES TO SCALE?

Case Studies  
Offer personal feedback

- <10
  - I did it
- 10-20
  - Created a template, staff does the first cut, I review
- 20+
  - Hire someone else to do it




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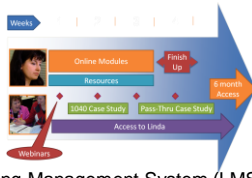
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WHERE ARE THE CHALLENGES TO SCALE?

Tracking and Reporting

- <20
  - Infusionsoft tags
  - Excel sheet
  - Emails to managers
- 20+
  - Installing LearnDash Learning Management System (LMS)
  - Enroll manager and give access to learner records
  - Learners upload assignments to LMS (no more emails)
  - All progress is tracked by the LMS (no excel sheet)




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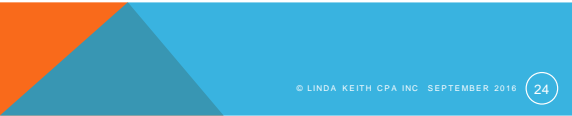
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**List considerations for scaling up. What are the limited resources (time, staff) that you must overcome.**




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- 1 DECIDE WHETHER AND HOW WITH LEVERAGE AND SCALE
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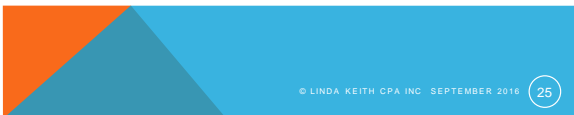
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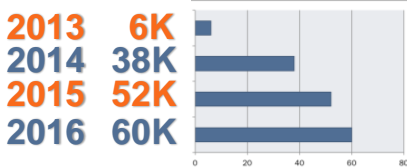
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In addition to the in-person training that continues.  
All webinars are on Tuesday.

## The Multiplier Factor




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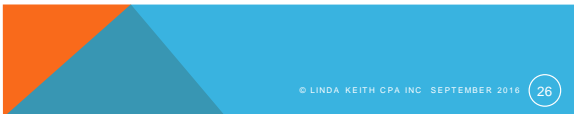
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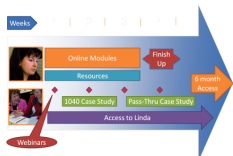
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## Walk-Thru HOMEWORK

Walk-thru for Speakers – [www.LindaKeithCPA.com/NSA](http://www.LindaKeithCPA.com/NSA)




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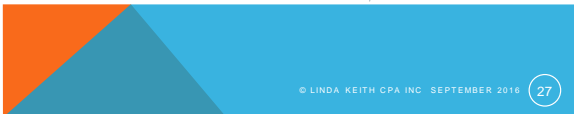
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Need help? Call us at 360-455-1569 or email support@lendersonline.com



HOME WHAT HOW ABOUT CONTACT ENROLL LOG IN

# Who do you want to lend to today?

Easier. Faster. With more confidence.™



Businesses

LEARN HOW



Farming Operations

LEARN HOW



Complex Borrowers

LEARN HOW

HOME WHAT HOW ABOUT CONTACT ENROLL LOG IN

## See previews of the modules

Select All Modules or the name of a virtual class you are planning to take. Virtual classes are an option to self-study, provide structure and accountability, and are included in your enrollment. Click on the module image to view the preview video.

All Modules / Financial Statement Analysis Virtual Class / Tax Return Analysis Virtual Class



1040 INTRO & METHODS



1040 B INTEREST



1040 C-1 BASICS



1040 C-2 DETAILS



1040 D & 4797



1040 E RENTALS



1040 F FARM



1040 F AGLENDERS

## HOW YOU LEARN

### You choose!

Some learn best on their own. Others succeed when in a more structured, interactive online class. Both options are part of Lenders Online Training. Once enrolled, you can go it on your own and/or sign up for either our Tax Return Analysis or our Financial Statement Analysis virtual class at any time.

### How do you prefer to learn?

Learn on your own



LEARN HOW

Join a 'virtual' class



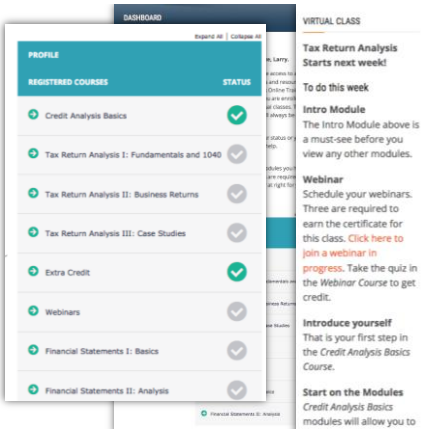
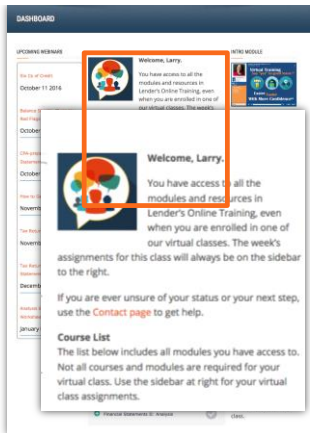
LEARN HOW

Series of horizontal lines for handwritten notes.



When participant logs in the welcome page they see depends on whether they are self-study or in a virtual class

- Self-Study
- Tax Return Analysis or Financial Statement Virtual Class
  - Pre-class, Week: One, Two, Three, Four, Archive
- Manager
- Taking the free trial




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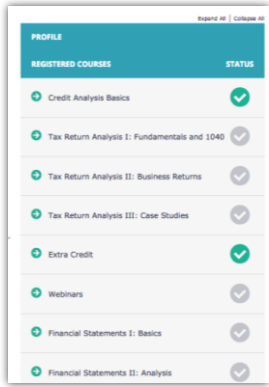
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### LEARNING MANAGEMENT SYSTEM

- Less work for us
- Visual progress for participants
- Easy reporting to managers
- What corporate expects
- **LearnDash** \$129 one time fee with one year support

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### 1040 Intro And Method

[BACK TO DASHBOARD](#)
[BACK TO COURSE](#)



#### Get Started with 1040s

- Adjust 1040 Page One income items to cashflow
- Understand the difference between AGI, SAM and hybrid methods
- Make the switch easier when you change companies
- Know what to look for on 1040 Page Two

#### LESSON TOPICS

1040 Intro and Method Module ✓

#### QUIZZES

1 1040 Intro and Method Quiz ✓

[← Previous Lesson](#)
[Next Lesson →](#)

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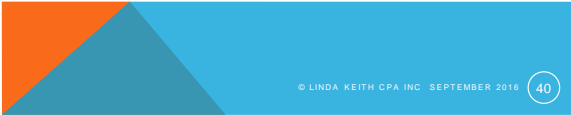
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# A simpler approach



## A SIMPLER APPROACH

**WISHLIST MEMBER**  
**\$197 ONE-TIME FEE WITH ONE YEAR SUPPORT**

**COMPARE TO MEMBERSHIP**  
**AT \$47/MONTH**

**MY VIRTUAL CLASS**



**Welcome, Larry. Let's get started.**  
Send us an email at [Class@LendersOnlineTraining.com](mailto:Class@LendersOnlineTraining.com) with a photo of you (goofy or fun, professional or personal) and the answer to these questions:

- How long have you been in a position that requires tax return analysis?
- What is your role?
- Have you received any classroom/formal training in tax return analysis? If yes, tell me about it.

- What is the most important thing you need to accomplish as a result of this virtual training?
- Tell me what you like to do for fun.

"I'll start." I am a sea kayaker which works well since I live on Puget Sound. I took up sea kayaking at the beginning of the "Great Recession" to let off steam and have some fun. I also enjoy kick-boxing and hiking.

**More on your pre-class to do list:**

- Test the webinar platform. If you have not already done it, email [Class@LendersOnlineTraining.com](mailto:Class@LendersOnlineTraining.com) to schedule a quick run-through, if you are part of a team, the team leader can do this for everyone.
- View the **Welcome Video** (below) to know what to expect and how our virtual class works.
- **Get started early if you like.** We have included a few of the Week One modules, some optional modules and the download for the 1040 Manual Section 1. No need to print the manual, just download it, take a sneak peek and keep it for reference.

**Welcome Module**

This module is designed to show you just how the modules work, and set you up for the class.

**Say 'Yes' to good loans  
Virtual Training**

## CASH VS ACCRUAL BASIS



[View module](#)

[Download handout](#)

Module length: 18 minutes. Plan on at least ten minutes longer for note-taking and exercises.

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**Find a vendor who**

- Converts your content into the needed format
- Provides the site and the server
- Includes the Learning Management System
- Includes the shopping cart
- Provides support, updates and new features

Lightspeed VT  
KnowledgeLink

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**HOMEWORK**

www.LindaKeithCPA.com/NSA  
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46

**GET OUT OF YOUR OWN WAY**  
Outsource the virtual training

**DIY VS DFY**

- More Cost
- Less Time
- Less Control
- Very scalable

**LightSpeed VT  
KnowledgeLink  
FlexTime**

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**CUSTOMER SERVICE TRAINING**  
24/7 · ON DEMAND

Learn to create an amazing customer experience.  
Create a collaborative corporate culture.  
Increase repeat business and revenue.

**INTRODUCTION**     **JOIN NOW**

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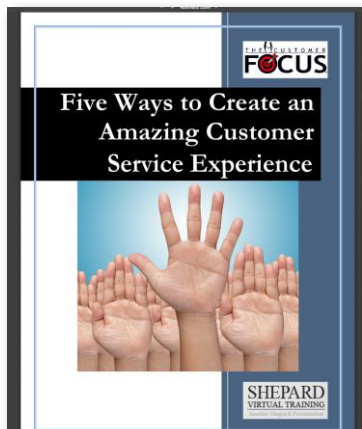
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QUESTIONS

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HOMEWORK

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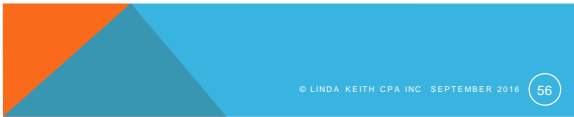
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- 1 DECIDE WHETHER AND HOW WITH LEVERAGE AND SCALE
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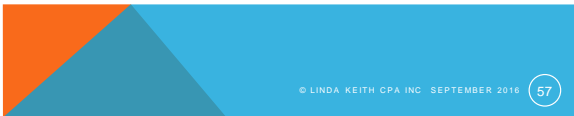
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**BUILD IT AND THEY WON'T COME!**

- Do you have a market?
- Can you bundle it with in person?
- Is anyone asking for it yet?



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# More Income. More Impact.



## Stage A Business Breakthrough With Online Learning

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