NOLAN Accounting Center

Program Curriculum

STEP 0: WELCOME!

- ☐ Welcome & program tour
- ☐ E-learning navigation
- ☐ Welcome Toolkit

STEP 1: YOUR BUSINESS PLAN, BUDGET, AND CASH FLOW

- ☐ Do you need a business plan?
- ☐ Exercise: Mind mapping a business plan
- ☐ Mini workshop: 4 Step annual road map
- ☐ Budgeting 101
- ☐ Managing cash flow

STEP 2: ENTITY CHOICE & MANAGEMENT

- ☐ Business entities 101
- ☐ Selecting the right entity type
- ☐ Setting up your entity
- ☐ Maintaining your entity

STEP 3: FINANCIAL INTELLIGENCE

- ☐ Financials 101
- ☐ Balance Sheet
- ☐ Profit & Loss ("P&L")

STEP 4: KEY PERFORMANCE INDICATORS (KPIs)

- ☐ KPIs 101
- ☐ Mini workshop: KPI Design
- ☐ KPIs in Action

STEP 5: INCOME MANAGEMENT

- ☐ Income in your business
- ☐ Accounts Receivable
- ☐ Sales taxes

STEP 6: EXPENSE MANAGEMENT

- ☐ Expenses in your business
- ☐ Reimburse it!
- ☐ Inventory

STEP 7: BUSINESS BANKING & FUNDING

- ☐ Business banking 101
- ☐ Funding for your business 101
- ☐ Mini workshop: What funding is right for you?
- ☐ How to manage debt

STEP 8: OWNER COMPENSATION & FRINGE BENEFITS

- ☐ How to pay yourself as a business owner
- ☐ How to set up owner payroll
- ☐ Owner comp & cash management
- ☐ Owner comp & taxes
- ☐ Business ownership perks (fringe benefits)

STEP 9: EMPLOYEES VS. INDEPENDENT CONTRACTORS

- ☐ What is an employee?
- ☐ What is an independent contractor?
- ☐ Understanding the difference

STEP 10: ALL ABOUT EMPLOYEES

- ☐ Recruiting into your culture
- ☐ Modern management & retention
- ☐ How to fire an employee properly
- ☐ How to pay employees
- ☐ Employee benefits

STEP 11: SOCIAL SECURITY & RETIREMENT

- ☐ Retirement basics
- ☐ Optimizing Social Security
- ☐ Navigating retirement plans

STEP 12: INVESTMENTS & INSURANCE

- ☐ Smart investments for small business owners
- ☐ Protecting investments with insurance

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STEP 13: TAX PLANNING

- ☐ How to optimize your tax situation
- ☐ Easy tax strategies for business owners

STEP 14: REAL ESTATE

- ☐ Leasing Real Estate
- ☐ Buying and Owning Real Estate
- ☐ Leasing vs. Buying

STEP 15: TECHNOLOGY

- ☐ Technology Today
- ☐ Building Your Technology Plan
- ☐ Automation
- ☐ Cyber Security

STEP 16: INTRODUCTION TO MARKETING

- ☐ Marketing Basics
- ☐ Ideal Customer Persona Analysis
- ☐ Marketing Plan & Activities

STEP 17: YOUR BRAND

- ☐ Branding Basics
- ☐ Your Brand Identity & Strategy
- ☐ Delivering & Growing Your Brand

STEP 18: CUSTOMER EXPERIENCE

- ☐ Your Unique Offering
- ☐ Designing a Memorable Customer Experience
- ☐ Delivering the Experience

STEP 19: INTRODUCTION TO SALES

- ☐ Mindset for Success
- ☐ Goal & Action Plan
- ☐ Sales Techniques & Strategies

STEP 20: LEADERSHIP

- ☐ Leadership Basics
- ☐ Leadership & Personality Styles
- ☐ Practicing Leadership

STEP 21: COMMUNICATION

- ☐ Communicating in Business
- ☐ Improving Your Communication Skills

STEP 22: TIME MANAGEMENT & DELEGATION

- ☐ Time Management Basics
- ☐ Time Management Techniques and Strategies
- ☐ Delegation

STEP 23: WORKING "ON" YOUR BUSINESS

- ☐ Working "On" vs."In"
- ☐ Transitioning from "In"to "On"

STEP 24: BUSINESS CONTINUITY

- ☐ Your Business Continuity Plan
- ☐ Preparing a Business for Sale

Congratulations! You've completed our program.

Thank you for taking the time to complete this program. We hope it has been a valuable tool for you and your small business!

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