# Profit First Certification Overview

This document is an overview of the Profit First Certification System. This structure has been created to take six months to complete and is calculated to require approximately 12 - 15 hours monthly to accomplish. Although the system is typically completed in six months, training can be completed within two to three months.

Profit First Training is detailed and documented in Trello via an automated checklist. All compliance is required in order to achieve Profit First Certification and will be appropriately assessed by the Profit First Guide.

## Pre - Training To-Do's

- Read the book and agree to the principals
- Interview with Co Founder for selection process
- If accepted: Review Welcome email and schedule orientation call with your assigned Guide/Coach
- Attend Onboarding Call with your Profit First Guide
- Complete Reference Release Form
- Review and Sign Rules of Engagement
- Introduction to community: Profit First University and Members Only Facebook Group
- Introduction to Certification Tracking Tool, Trello: We provide access to Trello and instructions on how to use it.
- Accept invitation to Private facebook group
- Review your login credential to Profit U. Snoop around in Profit U and on FB. Search for terms and phrases that are on interest to you. Get familiar with Profit First University landscape.
- Announce yourself in FB group
- Connect with Profit First Professionals on Social Media Platforms: FB, LinkedIn Twitter, Instagram etc.
- Introduction to Zoom- Bridging Gap Calls with peers and PF Founders
- Subscribe to Profit First and Grow My Accounting Practice Podcasts
- Complete your profile in Profit First University
- Schedule your call with your guide and put monthly Global Calls in your calendar
- Schedule future Topic Calls

## Profit First Foundational Training

- Review Profit First Book
- Attend Topic Call 1: Profit First University Walkthrough
- Watch the Profit First Quick Start Rocket Launch videos in Profit First University

- Read Profit First FAQs
- Read the Profit First Overview

## Profit First Implementation in Your Business

- Research banks in your local area
- Open your Profit First Bank Accounts
- Access Profit First Assessment Tool
- Attend Topic Call 2: Profit Assessment Blueprint Tool Walkthrough
- Watch the Profit Assessment Blueprint Video
- Complete the Profit Assessment Blueprint on your business
- Walk through your Profit Assessment Blueprint with your Guide
- Complete Quiz 1
- Complete Quiz 2
- Attend global calls

## Profit First Implementation in Your Client's Business

- Attend Topic 3 class: Choosing your beta clients and preparing your presentation of Profit First
- Pick two clients for beta implementation
- SCHEDULE a one-to-one call with your guide to walk through your beta clients' assessments
- Read ECROP document
- Determine compensation structure for beta assessments
- Run Profit Assessments on beta clients
- Devise your game plan for implementation
- Attend ONE-TO-ONE CALL to walk through beta clients' assessments
- Listen to client discussion of Profit Assessment Blueprint
- Complete Quiz 3
- Complete Quiz 4

## Profit First Branding

- Attend Topic 4 class: The Importance of Branding
- Update your email signature
- Update your voicemail outgoing message
- Update your social media profiles
- Update your website to reflect your Profit First services
- Update your business cards with your Profit First designation and logo

## Implementation Review

- Have Profit First discussion with Beta Client #1
- Have Profit First discussion with Beta Client #2
- Attend Topic 5 class: Client question review/implementation questions
- Attend Topic 6 class: Implementation review in your business
- Complete Quiz 5
- Complete Quiz 6

## Profit First Sales

- Pre-sales to do: Branding
- Attend Topic 7 class: Sales and Marketing tools and training
- Understanding Prospects: The Pain, Your Fix, The Benefit Training
- Pre-sales to do: Elevator pitch
- Pre-sales to do: Create announcement for current clients
- Pre-sales to do: Create Sales Systems
- Pre-sales to do: Develope Forms
- Pre-sales to do: Document Questions
- Pre-sales to do: Pre-Call Planning
- Pre-sales to do: Outcome based thinking
- Pre-sales to do: Create a Sales Script
- ONE-TO-ONE CALL for sales call role play
- Sales Follow Up: Proposals
- Sales Follow Up: Sequence and Scripts
- Sales Follow Up: New Client Onboarding
- Attend Debra Angilletta's Sales Mastery Program (recommended, not required)

## Certification

- Attend Topic 8 class: Review for certification exam
- Review the Profit First FAQs, the Overview and if necessary, the Profit First Book
- Complete your certification exam

## Upon Passing Certification

- Attend Convocation. Held twice a year, Convocation is a gathering of new and newly certified Profit First Professionals. Meet the Homebase team and members of your Profit First Certification class in person, and get an introduction to the Fortress experience.

- Join a Fortress. Fortress is our signature mastermind group, and members who are in a Fortress report tremendous business success.
- Spend an hour per week in Profit First University. Look for new content, listen to one-to-one calls, and browse for new ideas.
- Stay engaged in the Members Only - Profit First Professionals Facebook group.
- Listen to our podcasts as they are released.
- Dial in for the Global Call at noon Eastern time on the third Tuesday of each month. Details and recordings of prior calls are available here: http://www.profitu.us/event/global-calls/
- Come to ProfitCON! This is YOUR conference. ProfitCON is always an uplifting and motivational experience. Details about the next ProfitCON are here: http://www.profitu.us/event/pfu-events/
- Attend one of Mike Michalowicz's speaking engagements. If Mike will be speaking in your area and you want to attend, notify your guide. We can often get you a ticket to the event. Mike's speaking schedule is updated weekly and can be found here: http://www.profitu.us/event/mikes-events/
- Consider joining Mastery! Mastery members are constantly taking their businesses to the next level. Some benefits of Mastery membership include monthly Deep Dive calls, office hours with Mike, priority scheduling, two Mastery meet ups, and more.
- Go through the Surge process. Niche specialization is the best way to scale your business. Look for special classes, or go through the process here: http://www.profitu.us/training/surge/
- Complete our Value Pricing curriculum. Look for special classes to be announced. http://www.profitu.us/training/value-pricing/
- Stay connected with your guide! Just because you are certified doesn't mean you can't still have regular check-in calls with your guide.