

# MARKETING NEW VIRTUAL BUSINESSES

## PROGRAM GUIDE



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Knowledge Bureau™ is Canada's leading national post-secondary educational institute for continuing professional development in the tax and financial services. It is focused on providing knowledge and skills required to navigate a rapidly changing environment in the tax and financial services.

Founded in 2003 by bestselling tax author and internationally acclaimed educational entrepreneur, *Evelyn Jacks*, Knowledge Bureau publishes and delivers close to 30 online certificate courses leading to continuing education certification and occupational skills diplomas. It is the home of the *MFA™ (Master Financial Advisor)* designation, which signifies specialization in retirement, business, and succession/estate planning in wealth advisory practices, as well as the *DFA-Tax Services Specialist™* and *DFA-Bookkeeping Services Specialist™* designations for professionals in the tax accounting services.

Knowledge Bureau hosts regional workshops and in-class events in major centres across Canada, taught by industry leaders in a blended learning opportunity with its online courses, and an annual international event, the *Distinguished Advisor Conference™*, which explores strategic wealth management for retirement in locales clients retire to. It also partners with corporate clients and academic institutions, custom-designing CE modules, webinars, and keynotes to meet organizational needs. Finally, Knowledge Bureau is a national publisher of *Knowledge Bureau Newsbooks*, which provide opportunities for Canadians and their advisors to make better financial decisions together through highly interactive news information and educational experiences.

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**CONGRATULATIONS ON YOUR INITIATIVE TO EXPLORE YOUR INTEREST IN A  
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**A MESSAGE FROM EVELYN JACKS, PRESIDENT**

*I am delighted to welcome you to Knowledge Bureau! We are excited to help you get started on a world class educational experience to maximize your learning opportunities. We are completely committed to your ongoing success in your professional development and strive to exceed your expectations, because we want to be your educational home.*

Here at Knowledge Bureau, we are proud to offer you a comprehensive, true-to-life learning experience so you can graduate from your program selections with the knowledge, skills and confidence to provide outstanding solutions to clients in your chosen field of studies.

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**Learn More Now:** This **Program Guide** features details about the Faculty you are interested in. Please take a moment to consider all of the courses in the program. Following that is a detailed course overview and lesson plans for the course you have shown interest in and the individual course you have selected to get started. Finally, there is an application form you can scan and email directly to us.

**Best of Luck with Your Studies!**

**Sincerely, Evelyn Jacks, President, Knowledge Bureau**

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**"I vow to continually get better.  
This topic is near and dear to me.  
If I know ... I can share."**

- Paul J. Vaneyk  
Executive Business Growth  
Specialist, Undergraduate

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Learn how to nurture micro businesses with strategic planning and the operational foundations to engage both new employees and new clients, while you help owner-managers transform into powerful leaders.

1

### Leading Teams

When a business grows beyond the work of a sole-owner-manager, it's important to build a team and a great team culture for getting results. That means leadership methods and styles must change to the benefit of all the stakeholders to growth of the business. This course will help you understand what is required to build your skills and to be prepared for continuous change as your business evolves towards expansion and maturity.

#### Knowledge Journal Topics:

- Scaling Up
- Your Leadership Career
- Your Vision and Goals
- Building a Sustainable Business Model
- Branding
- Building Team Culture
- Critical Accountabilities
- Making the Right Investments
- Making Technology Work for You
- Your Succession Plan

2

### Building Business Plans

Planning for income, profit and long-term sustainable growth requires a strategic approach to business planning. Learn more about how to structure and plan for the financial results you need to grow a market-driven business someone will eventually buy.

#### Knowledge Journal Topics:

- Business Planning Landscape
- Business Modelling
- What is Your Market Opportunity?
- Who Is Your Customer?
- Products and Services
- How to Get and Keep Customers
- Management and the Company
- Operations: Production and Support
- Financial Forecasting and Assumptions
- Approaching Financial Partners

3

### Scaling Business Operations

Business leaders recognize that client relationships are integral to long term success, but this can only be achieved with the support of the right management and operational environment. The focus of this course is on establishing and enhancing a company's operational framework around which client relationships can be built and retained.

#### Knowledge Journal Topics:

- Differing Perspectives
- Business Leader's Vantage Point
- Organizational Structure
- Policies, Procedures and Systems
- Finance and Administration Functions
- Sales and Marketing Functions
- Human Resources Function
- Building Products and Services
- Developing an Action Plan
- Implementation

**"In today's ever changing business world, all businesses (large or small) need to continue to grow and scale up in order to keep pace with their clients' needs and retain top talent. Knowledge Bureau's Executive Business Builder Courses can help you achieve the success you are looking for. They provide a straightforward road-map to help leaders (and aspiring leaders) cover all the bases required to move their business forward"**

-- Joanne Sigurdson, Author, Leading Teams

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4

### Understanding Employment and Contract Law

Every company requires the interaction with legal talent to develop contracts with the various stakeholders it interacts with. The course provides the background information business owners need to understand basic contractual agreements and templates for engagements

#### Knowledge Journal Topics:

- Introduction to Contracts
- Leases
- Real Estate Purchases and Sales
- Employment Contracts: Hiring
- Employment Contracts: Terminations
- Incorporation
- Business and Succession
- CASL and DNCL
- Intellectual Property
- Privacy Laws

5

### Building and Communicating Your Brand

The old ways of marketing no longer work and competition is fierce. This course focuses on the things that can be done immediately, without huge investment, to navigate these new marketing opportunities and make a market within a community with a compelling value proposition.

#### Knowledge Journal Topics:

- Principles of Entrepreneur Marketing
- Positioning Your Company for the Future
- Five-Step Marketing Plan
- Psychology of Marketing
- Packaging Your Big Idea
- Introduction to Branding
- Plotting Your Marketing Process
- Advanced Marketing Concepts
- Putting it All Together

6

### Team Structure: Recruit, Motivate, Retain

Never has working with people been more important. One can have the best ideas coming from the most talented leaders, the most innovative work structures, and the most accurate forecasts and business plans, but without expert execution by the entire team, the company will not get the results it wants. This course will challenge you to consider your specific role in change management - one which will allow you to take your own personal

#### Knowledge Journal Topics:

- You, The Leader
- The Team Structure
- The Plan
- The People
- Taking Time for Next Assessment and Evaluation
- Preventing and Addressing Performance Gaps
- Value and Investment Transactions
- Managing Top Performers Most Effectively
- Connecting Your Team to the Big Picture

Study online in the safety and convenience of your own home or office.  
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### About Knowledge Bureau:

Founded by tax expert, award-winning financial educator and best-selling author, Evelyn Jacks in 2003, Knowledge Bureau™ is a widely respected financial education institute and publisher based in Canada. Our world-class education solutions are innovative, informative, and in-depth, with a multi-disciplinary approach to professional development in the tax, accounting, bookkeeping and financial services.

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Over 850,000 Online course module registrations  
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**"Our team of educational consultants and instructors make all the difference. We are always by your side as you study in the convenience of home or office. We want you to make the best educational decisions for your time and money and we are here to help."**

- Evelyn Jacks, President of Knowledge Bureau

**"Everything so far has had value to it. These studies have added to my knowledge and skills and I have put this knowledge to use immediately for our clients or I gained new skills which has given me the opportunity to expand our services."**

- William S., ON

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Bureau®**  
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# Marketing New Virtual Businesses

<b>OVERVIEW</b>
The old ways of marketing no longer work and competition is fierce. This course focuses on the things that can be done immediately, without huge investment, to navigate these new marketing opportunities and make a market within a community with a compelling value proposition.
<b>APPROACH</b>
The marketplace has changed on a fundamental level. The old ways of doing things no longer work. Competition is fierce. Most financial products have become commodities. Regulations are stricter. New technology and business models are disrupting the established financial service providers. This marketing course will teach you how to successfully navigate these new conditions so you end up being a winners in today's marketplace.
<b>WHY IS THIS CONTENT ESPECIALLY TIMELY AND/OR IMPORTANT</b>
<p>This course has four major benefits:</p> <ol style="list-style-type: none"> <li>1. Help you stand out from your competition</li> <li>2. Attract and close more high-quality prospects</li> <li>3. Generate more revenue per client</li> <li>4. Avoid being disrupted, and become a disruptor.</li> </ol>
<b>WHAT YOU WILL LEARN?</b>
Acquire expertise in advanced marketing principles and strategies to grow your business. You will learn how to identify the right target audience for your business and develop a value proposition that is attractive to your clients and differentiates your company from the competition. You'll discover ways to find and attract more high-quality prospects and how to package your offerings to maximize sales and profit-per-sale. Learn how to project the image of an expert, not just a salesperson, and build a retention barrier around your clients so they never leave. You'll establish the groundwork for a business that responds quickly to changes in the marketplace which will lead to you making more money while having more fun.
<b>SCOPE OF THE CONTENT:</b>
<ol style="list-style-type: none"> <li>1. The 10 Principles of Entrepreneur Marketing</li> <li>2. Positioning Your Company for the Marketplace of the Future</li> <li>3. The Five-Step Marketing Plan</li> <li>4. The Psychology of Marketing</li> <li>5. Packaging Your BIG Idea</li> <li>6. An Introduction to Branding</li> <li>7. Plotting Your Marketing Process</li> <li>8. Advanced Marketing Concepts (Part 1)</li> <li>9. Advanced Marketing Concepts (Part 2)</li> <li>10. Putting it All Together</li> </ol>



# CHAPTER 1

## THE 10 PRINCIPLES OF MARKETING FOR BUSINESS BUILDERS

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### KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

Key principles of marketing

### NEW SKILLS TO BE MASTERED:

- Develop a client-first focus and mindset
- Understand key psychological underpinnings of effective marketing
- Understand the fundamental differences between sales and marketing

### READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

- What are ways to attract new clients to your business?
- How can you differentiate your business from your competition?
- How can you sell without being a salesperson?
- How to project the image of an expert?
- What are ways to get your clients to pay you more for your services?
- What are the most important things you need to know about your potential clients?

# CHAPTER 2

## POSITIONING YOUR COMPANY FOR THE MARKETPLACE OF THE FUTURE

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### KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

- Future trends and market conditions that will have a significant impact on your business
- A new way to conceptualize and build your business that will protect you from being disrupted by change
- How to take advantage of the opportunities these changes offer

### NEW SKILLS TO BE MASTERED:

- Understand how the marketplace has changed on a fundamental level
- Learn why the product/service-centric business model is obsolete

- Learn why a client-centric ‘value hub’ business model is more appropriate for today’s market conditions
- Learn a new five-step thinking process to design your business for the future
- Develop a value creation and innovation mindset

**READING GUIDE - KEY QUESTIONS TO BE ANSWERED:**

- What are the key changes in market conditions that will affect your business?
- Why is the old product-centric mindset obsolete?
- Why is a client-centric mindset more effective and more future-proof?
- Why do you need a *Big Idea* to differentiate your company from the competition?
- Why is free value the best way to attract new clients?
- What are new ways you can generate incremental income for your business?

## CHAPTER 3

### THE FIVE STEP MARKETING PLAN

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**KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:**

- How to create a marketing plan for your business
- The danger of not having a marketing plan
- A five-step planning process to follow

**NEW SKILLS TO BE MASTERED:**

- Learn how to identify and target the right client type for your business
- Learn how to see your business objectively from the viewpoint of your clients
- Learn how to identify the key value proposition that differentiates you from your competition
- Learn how to identify new solutions (products and services) you could provide to your clients
- How to communicate your unique value proposition (*Big Idea*) to potential clients
- Identify the free value you could offer to attract more potential clients
- Learn how to package a ‘membership program’ that delineates clearly what your clients will receive for the fees they pay
- Learn how to create a ‘value hub’ of additional products and services available to your members

**READING GUIDE - KEY QUESTIONS TO BE ANSWERED:**

- What are the key changes in market conditions that will affect your business?
- Why is the old product-centric mindset obsolete?
- Why is a client-centric mindset more effective and more future-proof?

- Why do you need a *Big Idea* to differentiate your company from the competition?
- Why is free value the best way to attract new clients?
- What are new ways you can generate incremental income for your business?

## CHAPTER 4

### THE PSYCHOLOGY OF MARKETING

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#### KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

This chapter teaches you about the psychology of marketing, expanding on principles and concepts discussed in previous chapters, that will help you develop a marketing plan based on how people think and feel in the marketplace.

#### NEW SKILLS TO BE MASTERED:

- Learn why people buy ideas, not products and services
- Learn how to identify the idea you are currently communicating to the marketplace, and assess what thoughts and feelings it evokes in your client and potential clients
- Learn why direct sales techniques don't usually work because they give potential clients a negative idea about you
- Learn why packaging a BIG Idea—something new, better, and different—can increase the perceived value of your products and services
- Learn why human nature can make it hard to launch a new product, service or business, and how to quickly start your new endeavor by creating the right psychological context
- Learn why people gravitate towards things that are popular and scarce

#### READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

- What is the idea you are currently communicating to the marketplace? What thoughts and feelings does it evoke in your audience?
- How could you change your idea so it evokes more positive thoughts and feelings, and also help you stand out from the competition?
- How could you create a line-up for your products and services?
- How could you use the Free Value concept in your business?
- Are you projecting yourself as a salesperson or an expert? What is the difference?
- How could you package your services as a 'special'?
- How could you change your sales process so you have more influence in dealing with your potential clients?

## CHAPTER 5

### PACKAGING YOUR *BIG IDEA*

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#### KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

This chapter teaches you about how to package your *Big Idea*, something new, better and different that differentiates you from your competition, and communicates a premium value proposition.

#### NEW SKILLS TO BE MASTERED:

- Learn the fundamentals of packaging, especially value that is intangible
- Learn why people buy more when they are given a choice
- Learn why creating three packages—small, medium and large—will help you sell more, and make bigger sales
- Learn why it's actually riskier not to offer your potential clients a premium package
- Learn how to get out of low-price thinking so you can confidently sell more expensive products and services
- Learn how to visualize, package and price premium packages
- Learn how to provide more gourmet-level value to your best clients

#### READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

- What are the three packages you should offer your clients? What is the small, medium and large?
- How much should you charge for each of your packages?
- If you could charge your clients ten times more, what new elements, services, and value could you provide them?
- How can you transform your practice from a hot dog business into a gourmet business?
- What can you do to keep our very best clients?
- What can you do to attract more potential clients like your best existing clients?
- How do you need to change your thinking in order to stand out from your competition and make more money?

# CHAPTER 6

## INTRODUCTION TO BRANDING

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### KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

This chapter teaches you about branding and packaging. It explores the full scope of what branding means and why it's so important for your business.

### NEW SKILLS TO BE MASTERED:

- Learn the difference between branding and packaging
- Learn the different elements that create a brand
- Learn why your brand is found not in your company, but in the minds of your customers
- Learn how to project the right brand for your company
- Learn how to make your brand stronger
- Learn how packaging your brand can significantly increase the value of your business
- Learn why naming your brand is so important, and how to do it

### READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

- What brand are you currently projecting into the marketplace?
- Are you projecting the right brand? Does it attract the kind of clients you want, and does it differentiate you from your competition?
- What brand do you want to project? What changes do you need to make to your packaging in order to project this new better brand?
- What should you call your brand?
- What is something new you can add to your value proposition that would give substance to your unique brand?
- What can you do to attract more potential clients like your best existing clients?
- Do you need to change the graphic design of your marketing tools?



# CHAPTER 7

## PLOTTING YOUR MARKETING PROCESS

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### KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

This lesson teaches you about how to create a marketing process.

### NEW SKILLS TO BE MASTERED:

- How to make sales without doing proposals
- How to use coaching techniques in your sales and marketing process
- How to assume a more powerful position in your relationship with potential clients
- Learn why asking questions is better than having all of the answers
- Why it is important to help your potential clients clarify their goals before you sell them something
- Why you need to plot out a step-by-step marketing process
- Why you need to be patient in your sales and marketing process
- Why a longer sales process can result in bigger sales
- Why your first 'date' with a potential client should be packaged as a special event
- Why it is often useful to get your potential clients to buy something inexpensive first, so you can sell them something more expensive later
- How to effectively convert a potential client into a paying customer

### READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

- What is the best sales and marketing process for our company?
- Would it be better if we stopped doing proposals?
- What questions should we get our potential clients to answer?
- Is our sales process too fast or too slow? Should we add or remove steps?
- Are we asking for the sale at the right moment?
- Does our sales process turn off our potential clients, or get them excited?
- What can we sell our potential clients first to get them to open up their wallet?

## CHAPTER 8

### ADVANCED MARKETING CONCEPTS PART 1

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#### KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

In this chapter, we look at advanced marketing concepts. We build on Chapter 6 and talk about how to create a theme for your business and your *Big Idea* and how to package and communicate important ideas and concepts related to your business.

#### NEW SKILLS TO BE MASTERED:

- How to tell an interesting elevator speech that excites the imagination of your potential clients
- How to develop a theme for your story that reflects who you really are, and what you are passionate about
- How to create a hook for your story that gets your potential clients asking questions
- Why using an object or key image makes your story more memorable and impactful
- Why making your story fun is useful
- How to use metaphors and analogies effectively
- How to organize and simplify the many concepts and ideas you want to communicate.

#### READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

- What ideas and images are we currently communicating? Are they the right ideas and images?
- What is the key idea we want to communicate to our potential clients about your business?
- Is this idea unique and memorable?
- How can you use a theme and/or object to make your idea more noticeable and memorable?
- What concepts and ideas do we need to communicate in order to educate our potential clients before they become a client, or purchase a product?
- What is the best way for us to organize our ideas so they are simple to understand?

## CHAPTER 9

### ADVANCED MARKETING CONCEPTS PART 2

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#### KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

This chapter teaches you advanced marketing concepts such as magnetic marketing, creating a mystery around your business, projecting an aura of popularity and scarcity, and creating a sense of urgency in your potential client.

#### NEW SKILLS TO BE MASTERED:

- How to project an image of an in-demand expert, rather than a salesperson
- Learn knocking on doors (aggressive sales techniques) are counter-productive in today's marketplace, and undermine the professional image of your firm
- Learn why you cannot project an image of both a salesperson and an expert at the same time
- Learn why being completely clear and straightforward in your marketing message may not be the best strategy
- Learn why creating a mystery in your marketing message gets people curious about you and your firm
- Learn why there needs to be an underlying story behind your marketing message
- Learn how to create a call to action
- Learn how to project an aura of popularity (potential clients are attracted to companies and products that are seen to be popular)
- Why creating an aura of scarcity instills a sense of urgency in your potential clients
- Learn why being available 24/7 for your clients actually undermines your image as a successful professional
- Why you need to set a deadline for a yes/no decision from your potential clients

#### READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

- What image do you currently project in the marketplace: as salespeople or experts?
- What could you do to project the image of an expert?
- How could you make your business look more popular?
- How could you create an image of scarcity so your potential clients feel urgent about buying?
- When should you ask your potential clients for a yes/no decision?
- Do you have any potential clients right now that you know will never become clients?
- What can you do to make sure you don't waste your time on potential clients who will never become clients?

# CHAPTER 10

## PUTTING IT ALL TOGETHER

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### KEY CONCEPTS AND ISSUES - WHAT YOU WILL LEARN:

In this chapter, we look at three final concepts to help you pull everything together. We explore the life cycle of Big Ideas and other marketing concepts, and why you always need to create something new. We look at the role ethics plays in the success of a marketing program. And we contemplate the virtue of patience in the long-term success of your business.

### NEW SKILLS TO BE MASTERED:

- Why you always need to be innovating and creating new *Big Ideas* for your business
- Why good intentions need to be the core principle of your business, and your marketing programs
- Why your potential clients and clients will ultimately assess you based on your intentions
- Why patience is key to the success of a marketing program
- How to plan for exponential growth in your business
- Why you need to proactively develop well-refined systems and procedures ahead of time

### READING GUIDE - KEY QUESTIONS TO BE ANSWERED:

- Are your products and services at the beginning, middle, or end of their life cycle?
- What new *Big Ideas* can you introduce to your clients and potential clients?
- What are your truest intentions? Are you honestly living up to those intentions?
- Are you patient enough to build your business properly for future growth over the long-term? Are you trying to rush things?



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