

## Kirstin: Networking Explanation & CDB Challenge

Kirstin: Okay, everyone. I think we are ready to get started on the next session, which is me. I am going to talk with you about our Greet Day tomorrow. We have a really cool thing planned for tomorrow, and I think it's pretty unique. Just want to make sure that everybody can hear me okay, since I've been having some microphone issues.

Kirstin: Got it. Okay. Good. Okay. Awesome. Yay. Okay.

Kirstin: So, we're getting towards the end of the day, but we do have one more session after this, so don't check out just yet. But I wanted to go ahead and talk about what we're doing tomorrow, because it's a little weird. I'll admit, it's a little strange. But first I wanted to give a bit of a background of how we came up with this idea.

Kirstin: So, there's been a mastermind of sorts called bookkeeper elite that Ben put together. Oh gosh, I think it was like in 2018 or so. I'm not exactly sure when it started. And for a while now, we would meet in person three, four times a year. And these meetups became somewhat of, they made up a core group of people, and they became kind of a lifeline to a lot of us. Okay. Some say 2018, some say 2019. I don't know. But we started meeting and it's been fantastic. And we were supposed to have one, we were supposed to have a meetup in March of 2020, and we all know what happened in March of 2020 and that meetup got canceled. And because several of us thrived with those meetings, we struggled with this one getting canceled. We were all ready, we were anticipating it to get started, and to go and meet up with everybody. And so, when it got canceled because of COVID, we didn't know what to do with ourselves.

Kirstin: So, we decided that we were going to have a happy hour on zoom instead one night. And it was amazing. We had a blast. And so, then we had another one and it was a blast too. And then it turned into a thing and we started meeting weekly. The people who could make it changed from week to week, but almost every week, since March, somebody has been meeting. It might only be two people, but in some form or fashion, there has been someone meeting almost weekly since March. We don't always talk about business, but naturally, since we're all business owners, we're all bookkeepers. We usually do talk about our businesses somehow, but that's not the ultimate goal of our meetups, of our zoom meetings. The goal that we have is to build relationships with our colleagues.

Kirstin: And so sometimes we were on topic. We would talk shop, if you were, whatever that means, but we didn't always talk about that stuff. Like we learned about Justin Boynton's YouTube channel called Suburban Woodchopper, and it's about chopping wood. You should check it out. Like I said, Suburban Woodchopper on

YouTube. We learned about super soft fuzzy robes. We learned about ginormous blankets that like are almost room-sized. There was one time we even tossed around the idea of transporting chickens by Uber. There was miscommunication. They were talking about processed chickens. I thought they were talking about live chickens. There was just this whole big weird thing.

Kirstin: So, we had crazy conversations. But in the middle of all of that, we got to know each other well, and we did talk about business quite a bit. And we found that as a result of these meetups that were so informal, our businesses grew. We were able to stay focused because we kind of had that one thing to look forward to. Okay. The nights changed over time, but okay, like Thursday night is happy our night and I can work, work, work, or work, and I'm going to get focused on work so that I can go to happy hour on Thursday.

Kirstin: We were held accountable by the people that were there. If I said, "Oh, I really need to talk to blah, blah, blah, about whatever." The next week, someone would probably say, "Hey, did you talk to blah, blah, blah, about whatever it was?" So, I was held accountable that way. We would get ideas from other people. Like when Ben Day switched from Monday to Click Up, we all tuned in and it was like, I don't know, like we were watching Dallas again. I just dated myself. I think we were all just focused on, Ooh, he switched to Click Up. Stuff like that. It was crazy.

Kirstin: We collaborate. We share ideas with each other. We solved problems. If someone know, man, I'm running into this issue and we would all brainstorm and help each other out. It would be motivating to talk to these people and to get all these ideas and not just stay in our heads so often.

Kirstin: And I work from home. Most of us work from home and that can be a fantastic thing. Because of that, we miss out on the relational aspect of working in an office. Now, sometimes that's a good thing. Sometimes we don't want to deal with the people in our office. I get it. But at the same time, sometimes it can be a bad thing. We're missing out on this interpersonal stuff that helps our businesses grow.

Kirstin: And so that is where our Greet Day tomorrow comes in. There are going to be 12 different meetings tomorrow covering the entire day. The plan is for them to be just like zoom happy hours that I've been a part of. And here is our schedule. We've got everything from 10:00 AM Eastern to 7:00 PM Eastern and you'll notice, and they're going to be about an hour and a half long. We're not, like there's not a timer or anything like that, but that's just kind of what we've planned on. But you'll notice that they're not all an hour and a half apart.

- Kirstin: And that was on purpose. We purposefully scheduled them in such a way that it'll be difficult to attend every single one, because we don't want you to feel like you have to attend every single one. We're encouraging you to visit, I don't know, two or so, two or three. We tried to accommodate all the time zones. You're welcome, Michelle Sloan, in Hawaii. We tried to be mindful of people who have conflicts during regular business hours. That's why we've got some evening things. And then some people, they are able to do this type of meeting better during the day because of family conflicts at night. So, we really tried to balance it between both sets of people.
- Kirstin: Like I said, we want you to find at least two to visit, to try and find your tribe. In addition to these meetings tomorrow, we are planning for this to become a regularly occurring thing. So, within your groups, we would like you to come up with some sort of regular schedule to meet. It might be weekly. It might be monthly. It might be during the day. It might be during the evening. Whatever works for your schedule. I am going to be collecting information about when the meetings are decided on, when they're going to be happening and I'll be posting them so that others can join in, even people who aren't here today or who aren't participating tomorrow, DBA members will be able to join in later whenever they want. They can choose a meeting and attend.
- Kirstin: Or say the group that you meet with tomorrow ends up, their regular meeting, ends up being at a time that isn't good for you. It's totally cool to switch to a different group. You're not bound to the group that you're in tomorrow. That is not the one that you have to stick with forever. And you can even hop around. You can switch from week to week. It doesn't matter. Just try and find something, that the group fits with you.
- Kirstin: Like tomorrow. I don't know. You might find a group and it just doesn't click. I don't know what it ... Sometimes you click, sometimes you don't. And if it doesn't click, then just visit a group next time until you do find someone that you click with. We plan to expand the number of groups available, in time. So this isn't all that we have. We're planning to grow. And I've actually had some people who couldn't host tomorrow, that have said, "Oh yeah, I can do it on a regular basis at a later time. No problem." So, we are planning to expand this list.
- Kirstin: Now, I know that as bookkeepers, there are a lot of us who are introverts. I obviously am not one of them, but I don't want y'all to get freaked out about this. I want you to participate too so that we can get to know you, but I promise we're not going to put you on the spot. We're not going to make you talk the whole time. We would like you to introduce yourself and we would like you to tell about your business. But the rest of the time, if you just want to sit there and listen, that is totally okay. We want you to talk as much as you want to talk,

which if that's not very much, that's okay. Just sit back and absorb, if you want to.

Kirstin: So, like I said, these groups starting tomorrow, but continuing on are designed to form a community. Ben talked a couple of days ago on a DBA webinar about how we've got this large community of DBA and then these small communities, that this is the small community part of it. I think that this is going to be one of the things that really sets the DBA apart. Many other organizations, you're just kind of in this group, but you don't really associate with one another except maybe at a convention or something. And so, you don't really form relationships or a community and DBA is a community and so that is what we are aiming to do.

Kirstin: So that is the Greet Day schedule and what's going to be happening tomorrow. Now what I'd like to talk about is our CDB talent.

Kelly: Kirstin?

Kirstin: Yes.

Kelly: Can I interrupt for a second?

Kirstin: Yes.

Kelly: So, first of all, getting a lot of good feedback. People are loving this idea.

Kirstin: Yeah.

Kelly: Gabrielle put it really, really well. She said, "It's an informal mastermind." I love that. It's an informal mass.

Kirstin: Yes.

Kelly: And speaking of introverts and all that, I'm a weird case. People see me as an extrovert, but I'm actually, I don't know. I'm kind of a combination. When I know people, I can be the life of the party and whatever. But when I don't know people, I don't know how to make conversation. Hi, how are you? That's it. That's all I've got.

Kirstin: I get it.

Kelly: So, I just really encourage those introverts. When you get in there, it may take you a few times of coming to these sessions before you feel like it. But imagine you're in a party with 1,000 people, hard to talk to anybody. Right? But when you're in a group of five people or 10 people, so much easier. You get to know

these people. And like she was saying, one week somebody says something and then the next week you're like, you've got something to say, Hey, did you do that thing? Or, Hey, I noticed last week you were talking about that. Like Justin, Oh, I went to your YouTube channel, Justin. That's really great what you're doing. That's so cool. I thought it was awesome. You have something to talk about because people talked last week.

Kelly: So even if you're an introvert, I really encourage you guys to get in there because when you're in that small group setting, it's so much easier to come out of your shell because that's the big thing with introverts, it's not that you can't talk to people. It's usually more of kind of the large group and you feel overwhelmed by that. And these won't be that at all.

Kirstin: Right.

Kelly: I mean, we don't know what the mix will be tomorrow. You may end up coming to one where there is only three people. You may go to one where there's like 20 people on there, but it will weed itself out and it'll all kind of settle into something. Because remember, tomorrow people are going to go to multiple ones. So, you won't be attending multiple ones in the long run. So, but give it some time, go to these, really try to get that community. And imagine like in the future, for those of you come into BKC, like you get to show up to an event now with hundreds of people, hopefully, if COVID restrictions loosen up a little bit.

Kirstin: Yeah.

Kelly: And you already know people, like you get to walk in and see your friends that you -.

Kirstin: It's like a family reunion.

Kelly: Exactly. It's not just like when you see their name tag, you're like, Oh yeah, I've seen you in the group. You post a lot in the Facebook group and you just know a name. Like this is literally people that you're seeing their faces, you're talking to them every week. And now, it is, it's like a family reunion. You walk in and you're like, woo hoo. I've been talking to you for months. So anyway, that's all I wanted to say. So, I'll cut out now.

Kirstin: Oh, no. That's fine. And we actually were asked about niches. This isn't about niches either. It doesn't matter what niche some of these hosts are in. We can all learn from one another. And we aren't, I mean, we can talk about niches and I'm sure that people probably will, but that's not going to be the focus of these groups. Like, Oh, this is the real estate group or, Oh, this is the attorney group or whatever. This is mostly a, I don't want to say social, but in a way it's like a

business social setup type of thing. Not we're going to have trainings or presentations or anything like that. So, it's going to be pretty informal. These poor hosts, when I asked them to do this, they were like, "So what are we supposed to talk about?" And I'm like, "I don't know." It's really loosey goosey, but that's by design. So.

Kelly: You can think of it as an office party.

Kirstin: Yeah.

Kelly: When you go to a party, you're inevitably going to talk business, because that's what you all have in common. But you're also just going to talk about your life, your kids, the vacation that you just took and all that kind of stuff. So, think of it more as an office party, it's all of your kind of peers. Work definitely will come up, it should come up. Y'all should, like you said, hold each other accountable and give each other ideas, but that it isn't some kind of scripted today we're going to talk about and the focus of today's happy hour is ... It's just a gathering. It's a bunch of peers meeting up for a drink or for dinner after hours to just shoot the shit.

Kirstin: Exactly. Exactly. Okay. So Great Day, talked about that. Now we are going to talk about the CDB challenge. And I mentioned earlier that we have 12 people who have earned their CDB so far and to guess who is not one of those people. That would be me.

Kelly: Wa wa wa.

Kirstin: Yeah. Exactly. I feel like I'm at an AA meeting. Hi, my name is Kirstin Reeder. I'm the executive director of the DBA and I'm not certified by the organization that I'm the executive director of. So yeah, it's a little embarrassing to not have my certified digital bookkeeper certification. And my reasons are probably the same as so many of your reasons, which would be I'm busy working. I don't have time to take a test. So, I put it on the back burner, again and again and again. I think to myself, oh yeah, I really need to do that. And I never do it. I was even one of the original testers and I still didn't finish because I was busy. I was busy working and I didn't make it a priority. So, I completely get it, completely get it. It's been on my to-do list and it still hasn't happened.

Kirstin: So, because I know that I am not alone. We have come up with a plan to get several of us certified over the next several weeks. And this is our CDB challenge. If you participate in the challenge, you'll be able to get a 50% discount on the testing fees. And the promo code is I want my CDB. It starts Monday. You do not have to register or do anything special. Just join in. And like I said, the promo code is I want my CDB.

- Kirstin: It's going to run from February 8th to May 9th. We'll be completing one module and exam per week. And then you'll have two weeks to complete the final exam with a proctor and complete the other requirements to get your certification. I'm going to be posting in the Digital Bookkeeper Association Facebook group each Monday. And when you've taken the exam for the week, you'll comment, I'll tell you what to comment. I'll change it up from week to week. And then I'll update everybody on progress on the Friday of that week.
- Kirstin: Like Ben mentioned earlier today, we are not able to discuss what is on the exams or help each other with the material, but we can cheer each other on. We can encourage each other. If someone runs into, Oh, I'm not getting it done, we can troubleshoot to figure out how can we help this person get it done.
- Kirstin: I'm going to be in the trenches with you. I will be going through this challenge with you. And I know that you are busy, just like I am. It is one module a week. And so, set aside a time each week. Pick something on your calendar, put it on your calendar. If you use Google calendar like I do, label your status as busy so that your appointment scheduler won't try and schedule something over top of it from a client. Make this time a priority for you to work on this. One module, one exam, let's get it done.
- Kirstin: And again, I'm speaking to myself, totally here. And I'm in fact, as I'm saying all of this, I'm thinking to myself, I hope I can actually do this and make this a priority. That's literally what's going on in the back of my mind.
- Kirstin: The challenge will end on May 9th. It's a Sunday and the promo code will go away at that time. Anyone who earns their CDB, their certified digital bookkeeper designation, during that time, will receive special recognition from Ben. We're going to have a little ceremony of sorts where he makes a video recognizing all of the earners and you'll receive your certificate shortly after that, because he's going to actually have your certificate there on the video that he makes.
- Kirstin: What are all of the requirements for the certified digital bookkeeper designation? And you can find these on our website, [dba.org](http://dba.org), but you'll need to pass the proctored final exam, agree to the code of ethics, attest that you have one year of experience, meet the insurance coverage requirement and provide three letters of recommendation. This can be either two clients, plus a professional or three clients. Either one is fine.
- Kirstin: And some of these things, you can start to get them ready as you're finishing up the modules. Like say you're in week 10, you can go ahead and contact your clients and say, "Hey, I'm applying for this certification in a couple of weeks. Can you write me a letter of recommendation?" Etcetera. The rest of the

requirements shouldn't take much time at all. It's a couple check boxes, send in a copy of your summary letter from your insurance. You'll have two weeks to do the exam and get your application with all the other requirements in, at the very end of this challenge. All of these things will need to be finished before May 9th, in order to complete the challenge and receive the recognition from Ben. Not just passing the exam, but everything by May 9th.

Kirstin: If you know that you're going to be out of town for spring break or whatever, set yourself up for success. Decide ahead of time. Okay. I know I'm going to be out of town that week. So, the week before, I probably need to do two modules so that I don't get behind. But what if you do get behind? Don't quit. Either catch up or just keep going, just start where you are and keep going. If you don't actually complete this by May 9th, that is okay. You still made progress. And you're further ahead than what you are now. That is the important thing. That is what our main goal is in this.

Kirstin: Continue on after the challenge. Don't just get to May 9th and go, Oh, I didn't complete it by May 9th. I'm out of luck and I'm just not going to do it anymore. Keep going after that. You'll pay full price. You won't get the 50% off discount anymore on the testing and you won't get the recognition from Ben personally, but you'll still end up with your CDB and you'll still have that. You'll be able to put some cool letters behind your name. You'll be ranked higher in the DBA directory search results. We're working on having tiered benefits with some vendors where folks with their CDB get a bigger discount than the regular discount for DBA members. And you'll be on the ground floor of a new thing, the CDB designation in general.

Kirstin: So, join us on February 8th as we kick off the CDB challenge and get certified, get it off your to-do list. That is what this is all about. I am really excited about this. because like I said, it's one of those things that I've been putting off and putting off and putting off and I'm not going to put it off anymore and I am hoping that you will join us and we can get lots and lots of people to get their certification.

Kirstin: Okay. So, let me see how much time we have left and let's see here. Oh, yeah. Okay. We've got time for questions. No problem. Okay. What questions do we have about Greet Day tomorrow, about the CDB challenge? Feel free to type them in, Kelly, if you've found any.

Kelly: Yeah. I got a bunch in here.

Kirstin: I'm sure you do.

Kelly: And some of these, I'll just throw out the answers. Some of these, I'll need your help with.



Kirstin: Yeah. Okay.

Kelly: So, someone has completed, they're already part way through with the examination process. So, you can't redo any of the exams without paying for them. You have to pay for every exam. So, if you fail an exam, God forbid, you do have to pay to retake it. So, probably you don't want to go repay to take the exams, but you can go retake the practice exams. Each module has a practice exam and you, of course, can watch the content involved in each. So, you can review with all of that. And then just, lucky you, the rest of your testing is half off. So, you don't have to wait on us. Go ahead and get ahead of us. But if you want to hang back and go with everybody else on the challenge, that's fine too.

Kelly: I don't think either Kirstin or I know this answer. So maybe it's something y'all can discuss in the DBA group, but how much time to estimate for each module?

Kirstin: I don't know because I haven't been through it.

Kelly: I know. Right? So, I mean, and I think, I do know, because I was kind of overseeing the testing and I do know that as with anything, some of them were, I mean. I won't call any of them easy, but some of them were easier than others. Let's put it that way. And so, there were some that people really had to kind of study up on. It's very comprehensive. So, you may encounter things that, because of your niche or because of the clients that you serve, you don't really do that thing. So now you've got to go study it a little bit more. Where someone else, they do that thing all the time and so they breeze through it.

Kelly: So, I mean, it's going to be a little different for everyone, how much prep you have to put in it. And some tests are harder than others. That is the kind of thing that y'all can absolutely discuss in the Facebook group amongst yourselves, as we go through each week. Those of you who've been through that particular one, you can let people know. And again, you can't say anything about what's on the test or anything like that, but you can say, Oh, this one's really, really tough. Make sure you study up hard. Or this one was pretty easy. I breezed through it. Whatever. So, you can discuss those kinds of things as we're going through it. Just no discussion of actually what's on any of the tests. Let's see.

Kelly: Someone hasn't finished the BBL course. I mean, it depends. I mean, if you're practicing, I mean, we have a lot of people who get clients well before they finished the course. So, I mean, if you're practicing and you're doing it, I mean, I would try because here's the worst that can happen. If you get through three or four modules and you realize, wow, this is getting harder and I don't know this stuff. You got three or four modules done and you've got them at half price. And then when you're ready, you take the rest.

- Kelly: So try it. There is no penalty for trying. And if you take the first test, which I don't know if Kirstin said, the tests are normally \$20 a piece, 50% off, you'll get it for \$10. So, you take a test, you spent \$10, you failed it miserably and you realize I'm not ready for this. You lost \$10. No big deal. You come back when you are ready.
- Kelly: So just go as far as you can. Take advantage of this group mentality, this everybody encouraging each other challenge, take advantage of this discount and get as far as can.
- Kelly: So yes, it is 13 weeks. There are 11 individual modules on individual topics. And then there's the cumulative final exam, which is a proctored exam. All of this is 100% virtual, even the proctored exam is virtual. So, you'll get information of how to connect with our proctoring company and they monitor you. You have to kind of do a screen share and all that. So, 11 weeks of exams, plus two weeks to get your final exam done. And like Kirstin said, those last few requirements, the code of ethics, letters of recommendation, all of that.
- Kelly: Yes, there are templates for the letters of recommendation. We make it super simple. It's a fill in the blank. It's very short. We give them an example of what to write. It's a really simple, I mean, someone can do a letter of recommendation for you in a matter of minutes. So, we make it as easy for you guys and as painless for ... Everyone always, Ooh, I got to write a letter of recommendation. I don't know what to write. It's literally a fill in the blank. So, we make it as easy as we can for you and as easy on your clients and customers.
- Kelly: So, a couple of people are saying they don't quite have a year in business. You can still go through the examination. You can even finish the final exam. I'd have to double check, but I think that the final exam, between the time you finished the final exam and the time you actually complete your application, you have one year. So, you'll have a year of experience by that point. So again, go ahead and get this knocked out. Halfway through, three quarters the way through, all the way through. And then once you have your one year, you fill out the application and you're good to go.
- Kelly: Yes, you can retake any of the tests as many times as you want. Again, it does cost per retake, per take and retake.
- Kelly: There was already an email that's gone out for the networking groups. If you're brand new, if you just signed up, you might not have gotten it. Kirstin, is it posted in the Facebook group as well? The schedule for tomorrow and all the links?
- Kirstin: Yes, it is. The schedule was emailed and posted in the DBA group.

- Kelly: Great. The CDB, certified digital bookkeeper, if you log into your dba.org, click on that member access in the top right, you'll be on your profile page. If you've completed your profile, your top banner will say, earn your CDB. I don't remember exactly what it says. But it's a big blue banner at the top. If you haven't completed your profile, then it will still show you the three steps for completing your profile. And then you can just scroll down to where it shows certification in your profile. And there's a button there that says get certified, I think. So, it's right there on your profile page. It's either in a big blue banner at the top, or if you haven't completed your profile, just go down to the certification section and you'll see the button. So I mean, you can go there right now and look at it and start looking.
- Kelly: The 50% code will not be active until Monday. So, you can't get started soon. Sorry. Oh, Amy, who has been, I don't know, I can't remember if Amy certified or not yet, but Amy's been going through it. She said they were about an hour each for her. So see, that's not so bad.
- Kelly: Is it timed? The final exam is timed. The proctored final exam. I want to say it's two hours for 100 questions. You should have plenty of time. The rest of the 11 exams, no time limit on those.
- Kelly: Okay. I think that's it. There's no cost for the CDB program itself. Just the exam fee. So, this is included with your membership. You just have to pay the exam fees. So that's pretty much it. I think I got all the questions, Kirstin, about the CDB.
- Kirstin: I think so too.
- Kelly: But if you guys have any other questions, obviously, email us. Kirstin's going to be posting every single week with the challenge. So, we'll help you out in any way we can.