

# Scaling New Heights

An Advanced Training Conference  
for ProAdvisors and Intuit Solution Providers

May 24-26, 2010 – Atlanta Georgia

[www.ScalingNewHeights.com](http://www.ScalingNewHeights.com)

## “Is QuickBooks Consulting Dead?”

**Presenter:** Joe Woodard – The Woodard Consulting Group

**Panelist:** Robin Hall, President – VARC Solutions

**Panelist:** Laura Madeira - ACS, Inc.

**Panelist:** Wendy Rohrsen – The Woodard Consulting Group

**Panelist:** Dylan Hanna – The Woodard Consulting Group

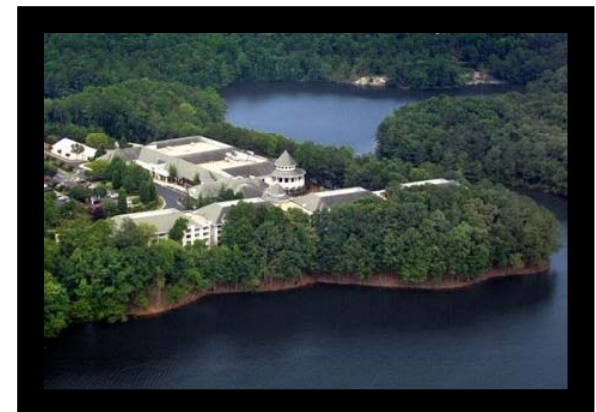
**Panelist:** Stormy Hansen – The Woodard Consulting Group





## About this Year's Conference

- General Information
  - Conference Sessions: May 24-26, 2010 – Atlanta, Georgia
  - Stone Mountain Climb, Picnic and Laser Show: May 23
  - Golf Tournament - Sunday Morning, May 23.
- Your Investment in the Conference Provides You with:
  - Practice Marketing, Management & Development Training
  - In-Depth, Intuit-Centric Professional Education
  - Networking Opportunities
  - Exhibition Floor
  - Professional Distinction





## Worth Mentioning

- 3 Days of Extreme Technical Training + 2 Power Breakfasts
- Golf Tournament – Sunday Morning - May 23
- Stone Mountain Networking Activity – Sunday Afternoon/Evening – May 23
  - Optional Hike/Mountain Climb (5:30-7:30)
  - Networking Dinner/Networking Social (7:30-9:30)
  - World Class Laser Show (9:30-10:00)
- Featured Speaker Lineup
  - Georg Gerstenfeld – Senior VP – Intuit Accountant Professional Division
  - BJ Schaknowski – Director of the Intuit Solution Provider Channel
  - Dan Schroeder – Partner, IT Audit & Assurance Services, Habif, Arogeti & Wynne
- Overflow Hotel Upgrades
  - Hotels are 2-5 Minutes Away by Shuttle
  - Shuttles Will Run on Demand from 6:00 a.m. to 10:00 p.m. Sunday through Wednesday
  - Hospitality Suites as “Pit Stops” for Offsite Guests
  - Meeting Rooms as Productivity Spaces for Offsite Guests
  - Discount Rate of \$99/night

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# Is QuickBooks Consulting Dead?



## QuickBooks Consulting Defined

- Not Bookkeeping Services
- Not Year End Cleanup As Part of a Larger Engagement (e.g. Tax Return)
- Not a “Side” Effort Designed to Funnel Clients into Your Practice
- Proactive, Non-Seasonal QuickBooks Support – For Example:
  - Data File Setup
  - User Training
  - Periodic Data File Analysis/Corrections
  - Expanding Client Use of QuickBooks
  - Creating Custom Reports within QuickBooks



## Timeless Challenges for the QuickBooks Consultant

- QuickBooks Retail Price Point → Lower Price Expectation for Consulting
- An Inherent Conundrum for QuickBooks Consulting
  - Mom & Pops Need It But Can't (or Won't) Pay for It
  - Mid Market Users Can and Would Pay for It but Don't Need It (or Need Less of It)
- QuickBooks' Over-Estimated Ease of Use
- Overlap Between the ProAdvisor Program Efforts and Intuit Direct Support



## New and Evolving Challenges for the QB Consultant

- Current Economy → Limits Consulting Budgets to the Essentials
- QuickBooks Longevity in the Marketplace
  - User Confidence and/or Over-Confidence
  - EA/CPA Confidence and/or Over-Confidence
  - Phenomenal Growth of the ProAdvisor Program
- EAs, CPAs and Bookkeeping Services Providing Some Level of Consulting as Part of a Larger Relationship



## New and Evolving Challenges for the QB Consultant

- Prevalence of Free, Online Resources for Users and IT Professionals
- Billing Rate Dilution within the Marketplace → QB Consulting as a Commodity?
- Enhancements to QuickBooks for Accounting Professionals
  - Client Data Review
  - Closing Date Exception Report
  - Reconciliation Discrepancies Report
  - Etc.



## Response 1: Consult on Additional Intuit Products

- Intuit QuickBooks Point of Sale
- Intuit Warehouse Management ES
- Intuit Field Service Management ES
- Intuit QuickBase



## Response 2: Move to the Mid Market

- Develop an Industry-Specific Specialization – Choose Wisely!
- Develop a Human Resources Strategy
  - One Product – One Consultant?
  - Join with Other Advisors in Your Area?
  - Be Prepared to Work Primary on Rather Than In Your Business
- Apply for Membership in the Intuit Solution Provider Program and Certify on All of Intuit's Mid Market Product Line
- Network, Network, Network
- Re-Brand Your Practice if Necessary



## Response 3: Consult on at Least One QB-Integrated App

- Distinction within the Marketplace
- Distinction within Networking Circles
- Bill Additional Services for Existing Clients – While Often Saving them Money over Alternative Solutions
- Better Retention of Larger Clients
- Often Receive Leads from the Developer
- Residual/Passive Income Generation
- Increased Internet Traffic to Your Website
- More Effective and Definable Professional to Professional Networking Opportunities
- Propel Your Practice into the Mid-Market



## Response 4: Go “Geek”

- Data Conversions
- Custom Programming
- System Integration
- E-Commerce Integration
- EDI Integration
- Local Area Network Configuration and Support
- Crystal Report Design



## Response 5: Process Excellence Consulting

- Process Excellence Consulting Defined
  - Holistic approach to the client's needs – beyond just accounting
  - Expands Your Role Beyond the QuickBooks Application to Incorporate One or More Third Party Add-ons → The Conductor of an Orchestra
- Allows You to Provide Direct or Sub-Contracted Consulting on:
  - QuickBase and/or Method
  - CRM Applications (e.g. Results CRM)
  - Hyper-Vertical Applications
  - Custom-Designed Applications

## Response 5: Process Excellence Consulting

### About Intuit QuickBase

- Cloud-Driven, Free Form Database
- Instantly Networks Process Systems throughout the Company
- Includes Robust Application Templates for CRM, Sales Management Project Management, etc.
- Somewhat Pricey due to High Buy-in Point but One User Account Provides Access to Multiple Applications
- Integrates with QuickBooks in Limited Ways and Each Integration requires Custom-Integration Work

## Response 5: Process Excellence Consulting

### About Method

- Cloud-Driven, Free Form Database
- Instantly Networks Systems throughout the Company
- Includes Robust Application Templates for CRM and Sales Management
- More Affordable Due to Multiple Editions and Lower Buy-in Point
- Fully Integrated (and Pre-Integrated) with QuickBooks – within the limitations of the SDK



## Response 5: Process Excellence Consulting

### We Consult on Both Solutions

- Method's Unique Strengths
  - Tight QuickBooks Integration
  - More Robust Customization Options
  - Outlook Integration
  - More Affordable for the SMB
- QuickBase's Unique Strengths
  - Much Easier to Learn (for the Implementer)
  - Stronger Project Management Application Templates and Capabilities
  - Easier to Scale (e.g. to 5,000 plus User Accounts)
  - Intuit Product → Increased Credibility within the Marketplace

## Summary

### Is QuickBooks Consulting Dead?

No...QuickBooks consulting remains an opportunity full of potential if you add one of the following to your QuickBooks consulting services:

- Consult on Additional Intuit Products
- Move to the Mid Market
- Consult on at Least one Product that Integrates with QuickBooks
- Go “Geek”
- Adopt Process Excellence Consulting

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Questions and Answers

