

Scaling New Heights

An Advanced Training Conference
for Intuit Advisors

June 17-20, Nashville TN

www.ScalingNewHeights.com

“QuickBooks Consulting 2.0”

10 Proven Strategies for the QuickBooks Consultant

Presenter: Joe Woodard – The Woodard Consulting Group





Strategy 1: Consult on Additional Intuit Products

- QuickBooks Point of Sale
- QuickBooks Enterprise Advanced Inventory
- Field Service Management ES
- QuickBase
- QuickBooks Statement Writer
- QuickBooks Online



Strategy 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



Strategy 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



Strategy 3: Consult on at Least One QB-Integrated App

- Reporting and Business Intelligence
 - Xpanded Reports
 - QQube (with Excel or Crystal Reports)
 - KPI (webKPI, iLumen, ProftSee, Profitably)
- Inventory
 - ACCTivate!
 - Fishbowl Inventory
 - QuickStock
 - SmartScan
- Professional Billing
 - Spring Ahead
 - BillQuick
 - TimeSlips
- CRM
 - MethodCRM
 - ResultsCRM
 - LegrandCRM
- Field Services (e.g. Hindsite)
- Other → Explore the Intuit App Center



Strategy 4: Focus on Residual Income

- Commissions
 - SaaS Applications
 - Merchant Services
 - Desktop Applications with Lifetime Commissions
- Support Plans
 - QuickBooks Quarterly/Semi-Annual Analysis
 - Monthly Support Plans – Best ROI for the Client with ERP Applications
 - Pre-Paid Blocks of Support Time
- Monthly Value-Add Services
 - Business Analytics (BI/KPI)
 - CFO Services
 - Bookkeeping Services



Strategy 5: Streamline Bookkeeping Workload

- Data Entry...So 20th Century
- Leverage Third Party Applications
 - ScanWriter
 - Bill.com
 - Bill & Pay
 - Time Entry Portals
 - Expense Reporting Portals
 - Import Utilities (e.g. Transaction Pro Importer)
- Integrate As Many Transactional Sources as Possible (e.g. e-Commerce and EDI)
- Share Entry Responsibilities with the Client
 - QuickBooks Hosting
 - Method

Then....charge a flat fee for your services → significant increase in profit margin.

Strategy 6: Provide High Tech Services

- Data Conversions
- Custom Programming
- System Integration
- E-Commerce Integration
- EDI Integration
- Local Area Network Configuration and Support
- Crystal Report Design (Tip: Use QQube)



Strategy 7: Provide Business Process 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:
 - Platform Applications like Method
 - CRM Applications (e.g. ResultsCRM, MethodCRM and LegrandCRM)
 - Hyper-Vertical Applications
 - Custom-Designed Applications



Response 7: Provide Business Process Consulting

Tip: Explore Method
(www.methodintegration.com)

- Cloud-Driven, Free Form Database
- Instantly Networks Systems throughout the Company
- Includes Robust Application Templates for CRM and Sales Management
- Fully Integrated (and Pre-Integrated) with QuickBooks – within the limitations of the SDK



Strategy 8: Network...Network...Network

- Other ProAdvisors
- IT Consultants
- CPA Firms
- QB-Integrated Developers (VAR programs are Networking Relationships)
- Mid-Market Resellers (e.g. Sage, Microsoft, NetSuite)
- Sales Reps for Payroll Providers



Strategy 9: Leverage Upsell Opportunities

- The Opportunities Already Exist with Your Client Base
- To Leverage These Opportunities You Must:
 - Keep Yourself in Front of Your Clients (e.g. Lunch and Learns, Support Plans)
 - Provide 360 Degree Consulting Services
 - Direct Resources
 - Contracted Resources
 - Strategic Partnerships with Other Consultants
- Be Relational → Working On Rather than In Your Business



Strategy 10: Work on Your Business

- Hire or Limit Your Potential. Those are the only choices you have.
- Leverage CRM for:
 - Lead/Opportunity Management
 - Sales Management
 - Case Management
- The “Cobbler” Kids Need Shoes
 - Leverage the Automation Tools You Recommend to Your Clients
 - Employ the Process Excellence Systems You Recommend to Your Clients
- Develop a Business Plan
- Develop a Marketing Plan (Start with Social Networking)

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Questions

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