



Building Your Firm of the Future

MB Raimondi, CPA, CITP

Presenter

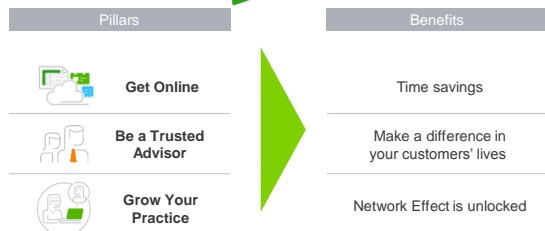
MB Raimondi, CPA, CITP

Masters of Taxation

- Advanced Certified QuickBooks ProAdvisor – Online & Desktop
- Certified: Enterprise Solutions and Point of Sale
- 16+ years teaching QuickBooks nationally
- Charter Member, Intuit Trainer / Writer Network
- Certified Information Technology Professional (CITP)
- Member / Instructor, National Woodard Network
- Steeler Group Certified Consultant / Speaker
- Intuit Premier Reseller
- Insightful Accountant Top QuickBooks Online ProAdvisor, 2016
- Insightful Accountant Top 100 ProAdvisor, 2016 & 2015



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Get Online



Growing Online

By FY17, QuickBooks will grow to 2M subscribers

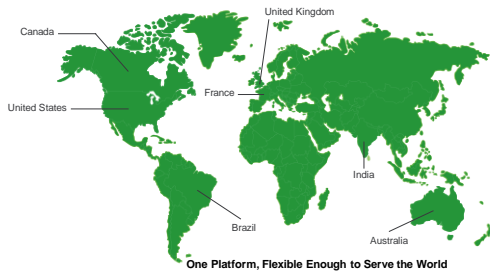
- At the end of our Fiscal Year 2015, we reached one million QuickBooks Online subscribers.
- 60% of new customers choose QuickBooks Online over QuickBooks desktop.



Join the conversation #QBFirmOfTheFuture @jim_mcgininis

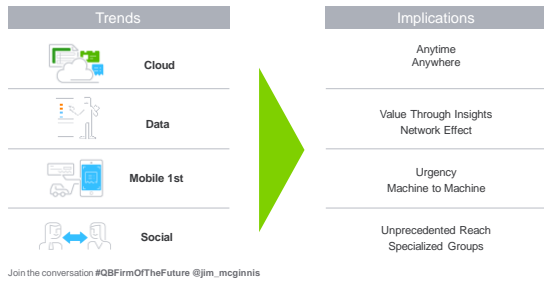
QuickBooks Online 'Plan', not 'Aspiration'

Why Get Online: Global Expansion



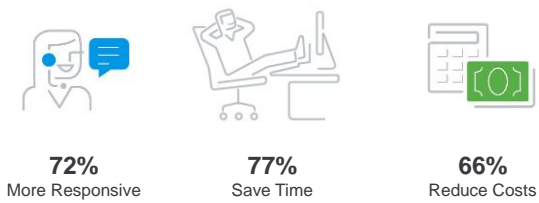
One Platform, Flexible Enough to Serve the World

Tomorrow's Industry Transformations



Accountants and the Cloud

Firm of the Future Survey



QuickBooks Online
and
QuickBooks Online
Accountant



Why QuickBooks Online: Technical Benefits

- Cloud-based software <https://qbo.intuit.com>
- No expensive equipment or networks to maintain
- QuickBooks Online Apps
- Accessible across multiple operating systems and devices
- Real-time, multi-user access from anywhere
- Hosted, updated and secured by Intuit's Servers using 128 bit encryption



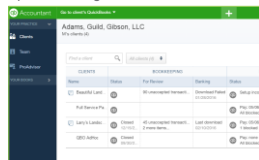
Why QuickBooks Online: Workflow Benefits

- Integrated document management
- Ecosystem of apps with seamless integration
- Less data entry and more advisory services
- One login for all your client companies
- Accountant's Toolbox



Why QuickBooks Online Accountant

- For Professionals (Bookkeepers, CPAs's, EA's, Consultants, etc)
- Access many companies from ONE access point
- Special tools/features to manage and monitor client companies
- Your window to view QuickBooks Online companies through



How do I get QuickBooks Online Accountant?

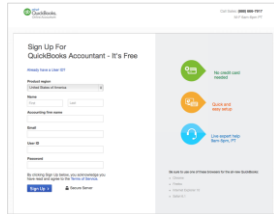
Sign up for QuickBooks Online Accountant (QuickBooks Online Accountant)

http://bit.ly/qboasignup

(all lower case)

OR

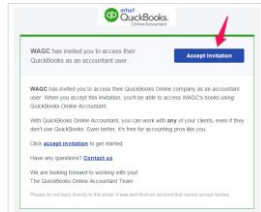
www.quickbooks.intuit.com/start/qba_signup



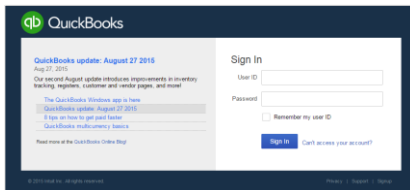
How Do I Get Clients to Show on QuickBooks Online Accountant?

Existing QuickBooks Online users must **Invite** you to access their file

Gear Icon > Manage Users

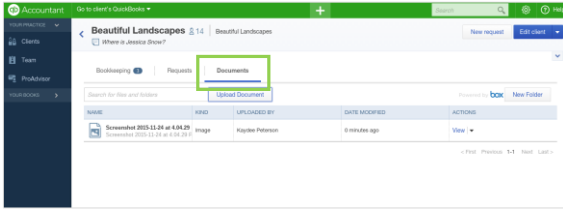


How do I log in to QuickBooks Online Accountant?

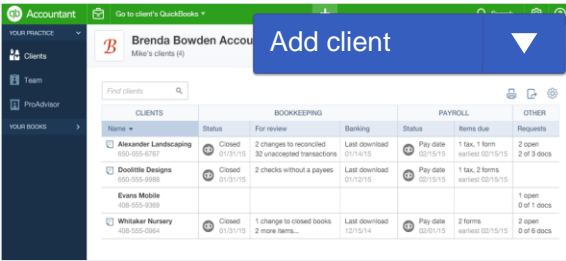


QBO.intuit.com

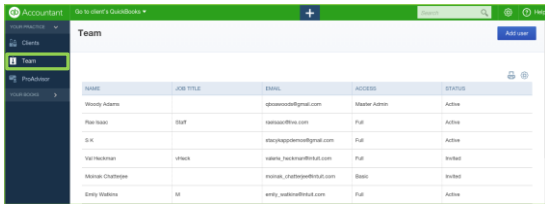
QBOA: Manage Documents



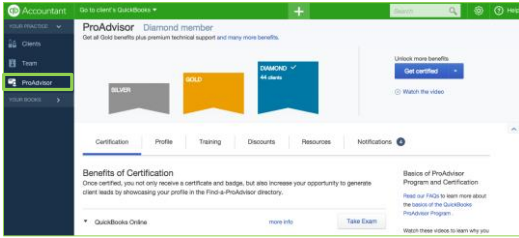
QBOA: Add Client



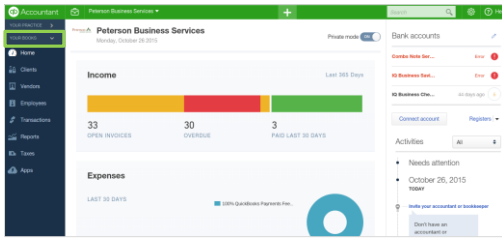
QBOA: Manage Your Team



QBOA: Access Your ProAdvisor Benefits

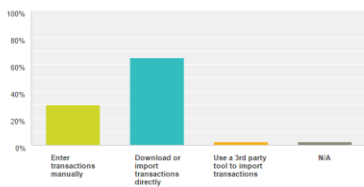


QBOA: Manage your firm's books with a free subscription to QuickBooks Online

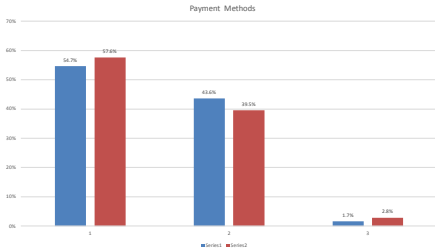


QBO Helpful Features: Bank Feeds

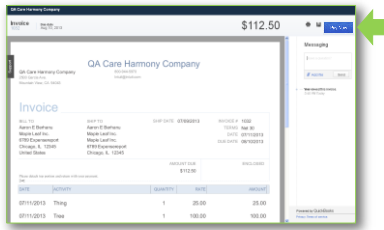
When I need to get bank or credit card transactions into the accounting system, the method I prefer to use is



QBO Helpful Features: Accepting Online Payments or Credit Cards

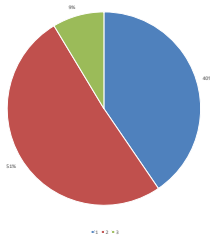


QBO Helpful Features: Accepting Online Payments or Credit Cards



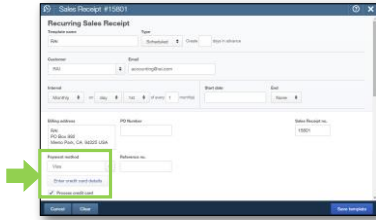
QBO Helpful Features: Recurring Charges

Set up recurring charges to automatically charge monthly and/or payroll clients

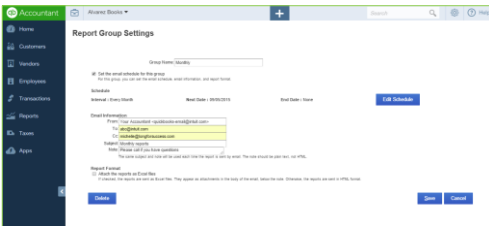


QBO Helpful Features: Recurring Charges

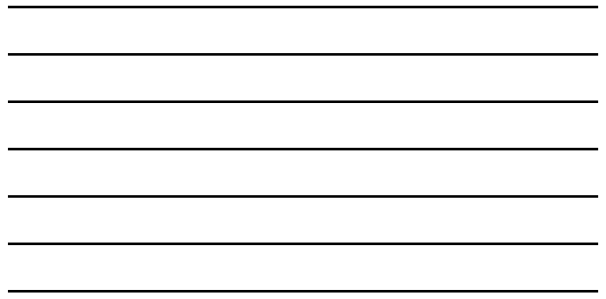
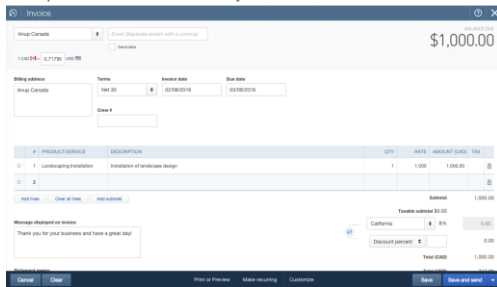
Set up recurring sales receipts and collect credit card payments automatically



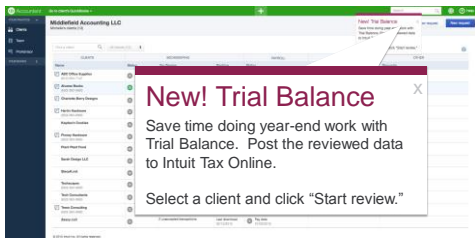
QBO Helpful Features: Emailing Reports



QBO Helpful Features: Multicurrency

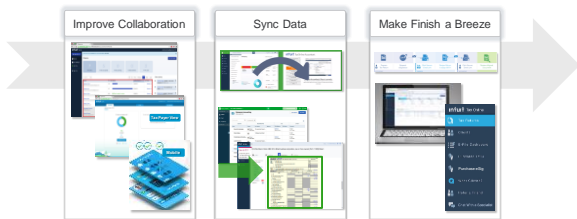







Trial Balance is accessible only to accountants, from within QuickBooks Online Accountant.

Saving Time in the End-to-End Tax Preparation Workflow





Be a Trusted Advisor



Be a Trusted Advisor – Impact on Client Relationship

Higher level of services
Data management and analysis vs.
data entry



**Trusted advisor vs. “just” the
bookkeeper/accountant**

Win for Clients + Win for Us!

Be a Trusted Advisor



Hourly

Fixed

Rewards Time Not Value
Not Scalable
Penalizes Efficiency

54%
want to be seen as an
accounting expert

40% Offer Value Pricing
56% Stay Competitive
70% Better Value

Be a Trusted Advisor: Value Pricing



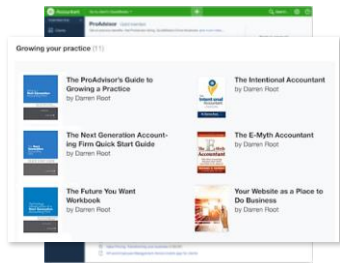
The Basics **Just Right** **Growth Plan**
Solid framework *Powerful efficiency* *Scalable solutions*

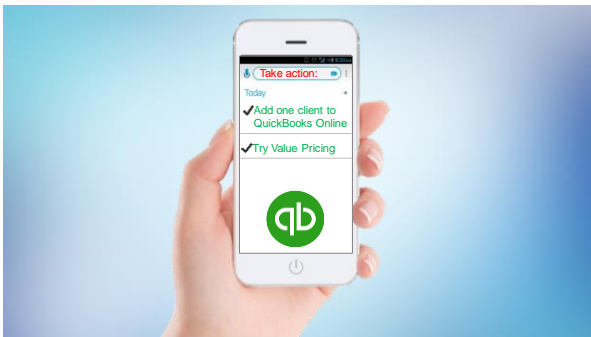
Accounting Hub	✓	✓	✓
Paperless Workflow	✓	✓	✓
Reconcile & Close	1	2	3
Banking Activity	25	50	75
Chart of Accounts	standard	standard	custom
Frequency	monthly	monthly	weekly
Controller Call	--	30 min	1 hour

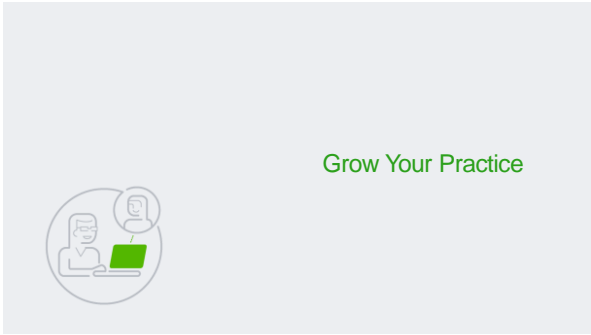
Be a Trusted Advisor: Insights



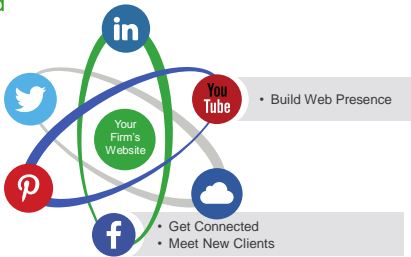
ProAdvisor Membership Website



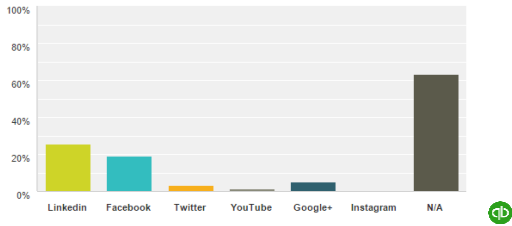


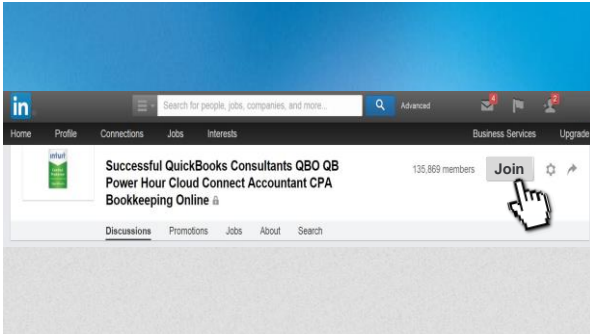


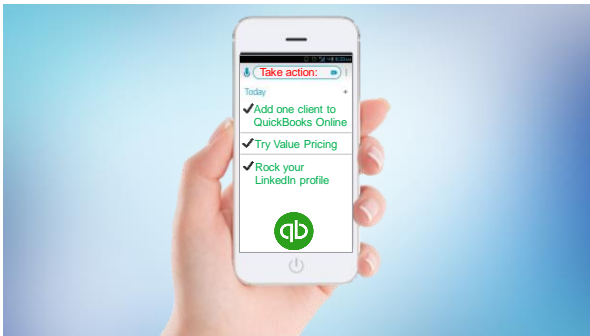
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Thank you
