QuickBooks ProAdvisors & Developers
Partnering Together for Better Solutions
Intuit Developer Network Advisory Council

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The Evolution of the Role of the ProAdvisor: From Bookkeeping and QuickBooks Training to Working With and Becoming a Developer – Part V

Over the last four newsletters I've discussed the evolution of the ProAdvisors role, if you have missed any of these newsletters they are available in the Newsletter Archive, but for now here's a brief recap:

- **Part I** – Discovering the "need" for automation, the "search" for that automation, and the time-consuming "work-a-rounds" that we develop in order to obtain "some" automation.
- **Part II** – We delved into what it is like to work with a programmer (aka Developer) and my own evolution from Bookkeeper/ProAdvisor to Developer.
- **Part III** – We looked at "what it takes" to develop a QuickBooks compatible add-on, from program design to product release, and everything in between.
- **Part IV** – We examined the various "relationships" that we are all involved in – whether we are an Advisor or a Developer, and some of the pitfalls that happen along the way.

This month we'll talk about "how" ProAdvisors and Developers can work together to create relationships, and provide some tips to make those relationships really work…for the benefit of our customers and ourselves. We'll also talk about some very big pitfalls to the success of these relationships – mostly stemming from **lack of communication** and how that can be a major stumbling block for all concerned.

Before we start delving into how to create good relationships, I'd like to backtrack a little and add an "afterthought" to last months article on relationships – specifically about the often challenging relationship between Intuit, ProAdvisors, Developers, and customers.

By now we all are aware that QuickBooks 2007 is shipping, nearly a full month earlier than last year. Some of you may be aware of the changes to the QuickBooks Solutions Marketplace and changes to the relationship between Intuit and QuickBooks third-party developers….for those who may be unaware of the changes to the Solutions Marketplace, here is a brief overview:

> In an effort to provide end-users and ProAdvisors with more information about third-party applications listed on the Solutions Marketplace and the quality of those products, Intuit has changed the structure of the **IDN** (Inuit Developer Network). Previously there were three levels of Membership:
>
> - **Premier Developers –** They paid a higher annual fee to have "early access" to Betas of the SDK and the new versions of QuickBooks, and have their products listed on the Marketplace.
> - **Professional Developers –** They paid a nominal fee to purchase QuickBooks and gain access to the SDK.
> - **Community Developers –** These members could download the SDK at no charge, but would have to purchase QuickBooks on their own.
>
> With the revamp of IDN 2.0 and the Solutions Marketplace you'll now see ***Gold*** and ***Silver*** Developer products listed on the Marketplace.
>
> - **Community Developer** – Entry level membership

- **Silver Developers** – Products can now be listed on the Solutions Marketplace "provided" that they have one application that passes the **QuickBooks Technical Review** process
- **Gold Developers** – The highest level of membership currently available. Gold Developers must first attain "Silver Developer" Status, plus achieve minimum scores on IDN's **Customer Satisfaction Survey**, and submit **One Customer Case Study**

For more information on the new membership levels as well as what the Technical Review Process and the Customer Satisfaction Survey entails, visit the IDN Membership Overview page.

These are certainly good changes all around. For Developers it allows their products and their company to "stand out in the crowd" and higher annual fees. For Advisors and end-users it means more available information about Developers and their products, and addresses some of the questions about "which is the better product".

While some changes are for the better, certain areas could certainly stand improvement! One major area that needs a lot of improvement (in my opinion) is the manner in which Intuit communicates with its Developers vs. how Intuit communicates with its ProAdvisors. Now as a ProAdvisor you may be thinking that Developers receive much more information about upcoming releases of QuickBooks - however, this is simply not true.

> As a **Developer** we (Sunburst) signed up for the "Early Access" program (which meant that we were supposed to have access to Beta's of both the new SDK and QuickBooks 2007). In mid-July we received an email with the following schedule:
>
> > Download Betas of SDK 6.0 and QuickBooks 2007 available August 1 and August 15.
>
> You might be thinking "wow, that's early or wow, that's great"; ***however***, those items didn't become available until August 28 and September 1st. Now you may be thinking, well that's not so bad, it's only a couple of weeks behind schedule, but what you don't know is that after downloading Beta 3 of QuickBooks 2007; we found ourselves sitting with 3 products that no longer worked correctly with **any** of the currently supported versions of QuickBooks. Needless to say, this was cause for panic – even though we realize this was a **Beta**, which means bugs and problems are not uncommon, but still……
>
> So we report the problems, and wait….hoping that their will be another beta and the problem will be soon corrected.

Let's flip the coin and look at the **ProAdvisor** side for a moment…..

> On September 15th, I receive my ProAdvisor Newsletter full of information about QuickBooks 2007 and a full schedule of release dates! Including the all important "available to pre-buy" and "scheduled ship dates" of the 2007 versions!

As a Developer I have absolutely no knowledge of this information! As a matter of fact I'm still sitting with 3 products that don't work to my satisfaction and hoping for another beta with the problems corrected, so I can really ***begin testing***! Imagine our anger over this – only because as a ProAdvisor I am made aware of pre-buy and shipping information and yet as a Developer there was no communication to us.

Finally, on September 21st we receive an email notification from IDN that "final release" versions of QuickBooks 2007 were available to download and in the middle of this email there is mention of shipping schedules. Not a lot of advance notice for Developers, and certainly not a lot of time for *thorough* testing! ***Luckily the problems we encountered with the Beta had been corrected with the final release…..but what if those problems hadn't been corrected? What would have happened then?***

For those of you who know me, you'll know that I seldom "mince words" and tend to "tell it like it is", for those of you who don't, well you'll find that out in the rest of this article.

This lack of communication for Developers is TOTALLY unacceptable!
As an Advisor, this information is important – but for a Developer this information is **crucial** and frankly Developers should be the first ones to obtain this information – not Advisors! As an Advisor, I never had 2,000 clients who depended on me – but as a Developer I do have 2,000+ customers who do depend on us and our software.

What if the problems in the beta hadn't been corrected with the final release version - who would have been blamed by the end-user? Who would have received the angry phone calls? **Ultimately the Developer!**

Hopefully you can now see why communication is such an integral part of the whole relationship picture – and what potential pitfalls can occur when there is a huge lack of communication.

With that having been said, we'll get back on track…

So, how do ProAdvisors and Developers create a relationship?

Like any other relationship – it takes willingness, time, communication, trust, and the realization that no two individuals are exactly the same or will do things in exactly the same manner. Ideally Intuit should have been involved in establishing relationships between ProAdvisors and Developers; but it seems that we've been left to our own devices on this matter – so I'll offer up some hard-learned advice.

Willingness

While this may seem basic, you need to be ***willing*** to look at a Developer as a potential partner rather than a potential threat to your clients' data, or a potential threat to your client's loyalty to you.

> Developers are NOT out to steal your clients from you, nor are they out to make you look less knowledgeable to your clients. In fact, a good relationship with a Developer may mean a referral source for new clients.

You also need to be willing to admit that the complicated spreadsheets you have devised for your clients to solve certain problems are not the "only or best solution" available.

> Developers write software to make peoples lives easier. Imagine life without QuickBooks or other accounting software…where would we be? Still doing books on paper! No thank you!

You also need to be willing to investigate third-party products and make a commitment to the time that is involved to do so, if a client asks you to check out a specific product or group of products. Think of it as "continuing education," the more you know about third-party products the better you can serve your clients. Education is more than "billable time".

> It's all too easy to say "oh that product will never work with QuickBooks or do what it claims to do," as I've had many customers tell me their Accountants or ProAdvisors have said. End users are willing to take the time to investigate ways to automate critical tasks to make their lives easier and so should you.

You also need to be willing to venture out there into the unknown by picking up the phone and talking with a Developer and realize that you may make mistakes along the way. Remember back when you started your QuickBooks practice and the thoughts of the "unknown" challenges? In reality it is no different, it's just that we've gotten "comfortable" with the ways things are.

Time

This one is tougher. Time is a precious commodity for most all of us. We are focused on serving our customers and don't necessarily have a lot of extra time, and time can be a double-edged sword for both Advisors and Developers, especially unbillable time.

As Advisors:

- We don't always have time to thoroughly research a Developers application
- We make our living selling our expertise in blocks of time
- We may have clients in several industries
- We may be a one-person operation

As Advisors we need to define "due diligence" when it comes to researching a third-party application. Some Advisors feel that in order to recommend a third-party application that they ***must*** know every intricate detail of how the program works and every possible nuance in which that application can be modified to meet a specific clients needs. With 400+ applications currently listed on the Solutions Marketplace, that is quite a daunting task! One that no one feels that they can accomplish. Those intricate details are best left between the client and the Developer; after all only a Developer really "knows" how their product can be "tweaked" to meet certain needs, and they are the only ones who are truly capable of making programmatic adjustments.

Researching and learning about third-party applications is an on-going process; much like our own QuickBooks practices – we didn't go into it knowing absolutely every little detail – we learned along the way. Quite frankly we are still learning, otherwise we wouldn't be attending QuickBooks training seminars or taking advanced QuickBooks certification classes. It's all about education or learning, and we certainly don't charge our customers for the time that we take to attend a seminar such as the Sleeter Group's Annual Conference. We do these things to better ourselves and learn how we can better serve our customers. If we take that same philosophy and apply it to researching third-party applications, we will all be much better off.

As Developers:

- We don't always have time to answer the most basic questions from Advisors that are covered in detail on our website or our listing on the Marketplace
- We make our living selling our product(s) and supporting our customers
- We focus on one industry or industry segment
- Our business may consist of 1-??? employees

As Developers most of us provide the bulk of the information about our products on our websites, making it easily available to anyone at any time. Our focus is our customers and listening to customer feedback to make our products more functional in their eyes.

We don't always have time to answer basic questions that are covered in detail on our website; and frankly Developers get just as annoyed with these basic questions as an Advisor does with a client who calls to ask the most basic of questions about QuickBooks.

As Developers with products geared toward a certain industry, or industry segment, we have made it our business to be knowledgeable about one specific task or group of tasks; and are often times experts in our own rights.

Communication:

Another tough one. However we simply need to talk to one another and put our personal feelings aside.

As Advisors we need to "talk" with our clients and learn about their pain points, get right in the trenches with them and discover what it is that they need to automate and why. Then we need to turn around and have a discussion with a Developer and talk about "how" their program can fill this need.

As Developers we need to learn to be less technical in our explanations. *(More on communication later.)*

Trust:
Trust is something that is gained over time as relationships are established. However many times trust starts with our initial contact or first conversation with someone. Our "gut feeling" usually tells us if the person we are talking to would say anything in order to make a sale, or if what that person had to say was genuine. So needless to say, first impressions count for a lot.

Realization:
We each need to realize that everyone does things differently and that most of the time there is no single "right" way of doing something that will meet everyone's needs. There are, however, often "better" ways of doing something.

Communication……

Communication is probably the biggest roadblock that Advisors and Developers face when dealing with each other. I know it was one of the most difficult areas in the development of our software between Ben and myself. I would speak in what he called "accounting speak" and he spoke in "code speak" to me, or so it seemed. In reality I talked about the end result – what the product had to do, and would do, when it was finished; while he spoke about how to build the program to make it accomplish the end result that was required. While they are quite different aspects of the situation – they really aren't. Everything has to have a beginning and an end. It just depends on "how" you get there.

Another example on the importance of communication. As a Bookkeeper/Advisor how many times have you picked up the phone; called a Developer and asked:

- "How does your software work?" You may have been given a long technical tirade of information that you simply didn't end up understanding, or maybe a response that you felt didn't answer your question.
- "How does your software access the QuickBooks data file?" To this you hear another long tirade of information that you didn't end up understanding, much less care about.

Have you ended up feeling frustrated at the end of the conversation? Feel like your questions were not answered? Have you ever said the following to yourself (in total frustration) after hanging up the phone:

> "All I really wanted to know was does your software write information back to QuickBooks; and are there safeguards in place to ensure that the integrity of the data file remains intact…can't you answer a simple question!"

If you haven't had this exact type of conversation, I'd hazard a guess that you've had one that is similar.

Communication & Relationship tips…

- **Be specific:** It's difficult for Developers (and even sales/support reps) to answer generic questions such as those above. Even I hesitate for a moment when faced with ***"how does your software work"***, and many times I will start my response with "Is there something specific that you would like to know?" If you want to know what information the 3rd party application writes back to QuickBooks, then that is the question you want to ask – not how does your software work.

- **Identify yourself as a ProAdvisor or CPA:** As Developers, we are more used to dealing with end-users and become familiar with the questions that they ask and the concerns that they have. Identify yourself as a ProAdvisor; we do realize that you will probably have different concerns and ask different questions than an end user will. This simple step may help you get a different or better answer to your questions.
- **Do your homework:** Take the time to visit the Developers website and/or their listing on the QuickBooks Solutions Marketplace before picking up the phone to ask the most basic of questions – such as what is the price of your product or what kind of support do you offer.
- **If you aren't 100% familiar with the problem – don't "act" like you are:** As an Advisor you may have clients in several different industries – when this happens it's tough to be an "expert" in all areas of each individual industry. Developers on the other hand tend to focus on one industry or a segment of that industry. So the bottom line here is – if you aren't 100% familiar with the problem or why the problem exists; don't act like you are – because a Developer will know. Better to be up front and honest.
- **Ask, Don't Demand:** If you'd like a free trial or evaluation copy, by all means feel free to ask the Developer…..but for heaven's sake don't demand it or even expect it. Developers are small-business owners just like you, and let's face it, how would you feel if someone demanded that you give away your time and expertise for free?
- **About commissions and reseller programs:** Not every Developer will offer this, frankly they are a nightmare to administer for the Developer, and certainly don't make it a pre-requisite to recommending a product! Just because a Developer doesn't have this type of program doesn't mean that they wouldn't be willing to work with you in other ways – such as customer referrals. What's worth more….a 10-30% one time commission or an on-going client?
- **Realize that you each have a responsibility to, and a relationship with, the end-user:** As an Advisor purchasing a third party application for a client; don't withhold client contact and address information from the Developer (that is one of the most frustrating things that I run into as a Developer). The client is not just your client, they are also the Developer's customer and we all need to be able to communicate with one another.
- **Don't feel like you have to know every intricate detail about all of the 3rd party applications listed on the Solutions Marketplace before making a recommendation.** As an Advisor I can understand why some of you might feel that you have to know this in order to help your client solve a problem or make a recommendation – but in reality that is a daunting task! Due diligence is the best "service" that your client can ask for.
- **Realize that Developer products may not be able to solve absolutely positively every situation:** This is a tough one for all of us to swallow, but unfortunately it happens. As an Advisor when you run into this type of situation you may feel that the Developers product is "*no good"* because it cannot solve a specific problem. Before you make that statement, realize that Developers who create 3rd party applications do so using the Intuit SDK, and that Intuit controls what data can be accessed from the QuickBooks file and how that data can be accessed. A good example of this is with our Certified Payroll Program – one of the items that is required on the final reports is the number of Federal Withholding Allowances, which we all know is in the QuickBooks Employee Record, however, the Intuit SDK does not allow us to access that information, even on a read-only basis, so the end-user has to double enter that data. Does it mean our program is therefore *"no good"?* No. It just means that we have to work within certain parameters that you may not be aware of.

Changing times, changing attitudes, and changing methods…..

As ProAdvisors become more and more aware of the many third party QuickBooks compatible software applications that have been, or are being, developed for different industry verticals; you find that you are no longer just selling your time (a subject of much friction) but are now able to offer up solutions to solve problems which can drop savings straight to the clients bottom line.

Whether you are meeting with a new or existing client you can now ask the following questions:

1. How can I help you improve productivity (an operations question)
2. How can I help you improve profits (a QuickBooks question)
3. What tasks take the most time to complete (a productivity question)

When you are able to ask these types of questions and offer suggestions that will greatly automate the clients pain points, you are no longer viewed as simply someone who "helps them with QuickBooks and perhaps does my taxes." Now you are viewed as someone who "helps them with their business ***and*** is a trusted and valued partner".

You as their partner may also have many other partners, and we all need to work together for the benefit of the end-user, after all that should be the main goal of all of us – Intuit, ProAdvisors, and Developers.

This concludes our series on the Evolution of the ProAdvisor role, I hope you have found it useful to "see things" through the eyes of a ProAdvisor/Developer.

Best of luck to you all on your journeys; it's a very interesting road to follow!

Nancy