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

This article has been contributed by Nancy Smyth, CQA; Sunburst Software Solutions, Inc. and Managing Editor IDNAC Newsletter
September, 2006

The Evolution of the role of the ProAdvisor: From Bookkeeping and QuickBooks Training to Working With and Becoming a Developer - Part IV

Over the last three newsletters I've discussed the evolution of the ProAdvisors role. **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. In **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** – was all about "what it takes" to develop a QuickBooks compatible add-on. If you've missed these articles, they are available in the Newsletter Archives.

This month I'd like to wrap up this series by discussing the various "relationships" we are all involved in – whether we are an Advisor or a Developer. We'll look at some pitfalls that happen along the way, and what we each can do to avoid them, or at least make them more tolerable. – The goal is to have a "win-win-win" situation for everyone involved. As I wrote this I realized it was impossible to wrap this up 'nice and neat' this month; the relationships are much more involved than many might realize and it would be a disserve to just gloss over the intricacies of it, with that in mind there will be a Part V of this series.

Some who have been following this series may think the subject of relationships is an odd topic to be included in this series; if I were reading this series I might also feel this way. However, as both a ProAdvisor and a Developer I can assure you that "**relationships**" is the correct subject to discuss.

- As an Advisor I have a relationship with a Developer (my husband Ben), other Developers, other Advisors, Intuit, and my customers.
- As a Developer I have a relationship with Advisors, other Developers, Intuit, and my customers.

While each of these relationships are usually very rewarding, they are all very different, and can be very frustrating.

Relationships……

We are all involved in relationships everyday of our lives, both personal as well as professional. How do we deal with them?

- Do we find them rewarding?
- Do we find them frustrating?
- Do we find them making us defensive, as if someone were "threatening us?
- Do we think only of ourselves; our own wants needs and desires?
- Do we think first of what's best for others, first and foremost?
- Do we feel overly protective of the people we are involved with?
- Do we try to be everything to everybody?
- Do you like working with others?
- Do you feel that you have to do everything?
- Do you find yourself making promises to do "something" by a certain time, only to miss the deadline?
- Are you good at asking for help when you are overworked, whether at home or on the job?

- Are you open to suggestions on new ways to do things?
- Do you feel that your way of doing something is "the only way"?
- Do you "fear" failure?
- Do you "reach" for success?
- Are you trusting or distrustful?
- In your professional relationships with your clients do you get in the "trenches" with them to discover/get to know the issues that they face on a daily basis?
- In your professional relationships with your clients do you feel that you are there to perform a single task (train them, check their entries, do their taxes) and that's it?

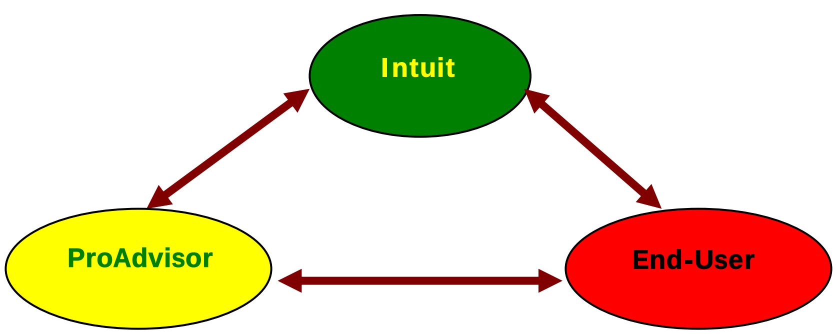
You might think these are odd questions; but really they aren't. How you answer these questions plays a very important role in how we deal with others in our professional and personal lives. But, I digress….so let's get back on track.

The "relationships" that I really want to talk about is between the following groups – Intuit, ProAdvisors, QuickBooks end-users, and third-party Developers.

Initially Inuit had a direct relationship with their end-user's and it remained that way for a very long time. Do you remember reading or hearing how Intuit would have tech support people in "box stores" like Staples, Office Max, Office Depot, etc. and how those support people would "go home" with end-user's who purchased Quicken off the shelf? They did this so they could *really know* the problems that these new customer's faced when they went to install the software on their home computer; so that they could in turn make it easier. Thus the "first relationship" was established.

The next relationship was formed when Intuit developed the ProAdvisor program in the late 1990's. One of the reasons the ProAdvisor program was developed was because Intuit realized they couldn't manage to provide *all the* support and training to its growing number of end-user's. The end-user's were seeking training from qualified bookkeeper's, consultants, CPA's, etc. who "knew" QuickBooks and could either help them setup and run the program or provide bookkeeping services for their growing businesses. So the "relationship" expanded.

- Intuit had a relationship with both ProAdvisors and end-users
- The End-user had a relationship with both Intuit and the ProAdvisor
- The ProAdvisor had a relationship with both Intuit and the End-User



This 3-way relationship worked well for a long time and was beneficial to all parties involved. Intuit provided the Advisor with training and new versions, End-users received the help they needed from qualified people, and Intuit received feedback from both groups.

However, like in all relationships…. things change over time and both groups wanted more! More features, more basic functionality, more industry specific solutions. Could Intuit make QuickBooks the right solution for *"everyone in every industry?"* That answer, was a **NO**. The next relationship to be established…..the 3rd party developer. Third party developers were a previously foreign and unknown entity, thus changing the basic structure of a long-time relationship. Let's take a look at "why" things brought about this change.

We live in a steadily accelerating and fast paced world when it comes to the accounting arena for businesses. Only the smallest of companies still do their "books" by hand, and it's no wonder when you consider:

- Computers in the workplace, at all levels, is more prominent than ever
- The decreasing price of computers, combined with increasing power and speed
- The sophistication, knowledge, and expectations that we, the "users' of information, require
- The need for instant information brought on by competitors
- Readily accessible and increasingly sophisticated software
- Automation – more things to do with no additional time to do them

Business owners want, and need, their information **RIGHT NOW** in order to be able to make better day-to-day business and financial decisions. The *need-it-right-now* feeling converts into wanting and needing instant access to more features, more basic functionality, faster processing time, and more industry-specific solutions than ever before. All of this means change…..but are ProAdvisors, bookkeepers, and CPA's ready?

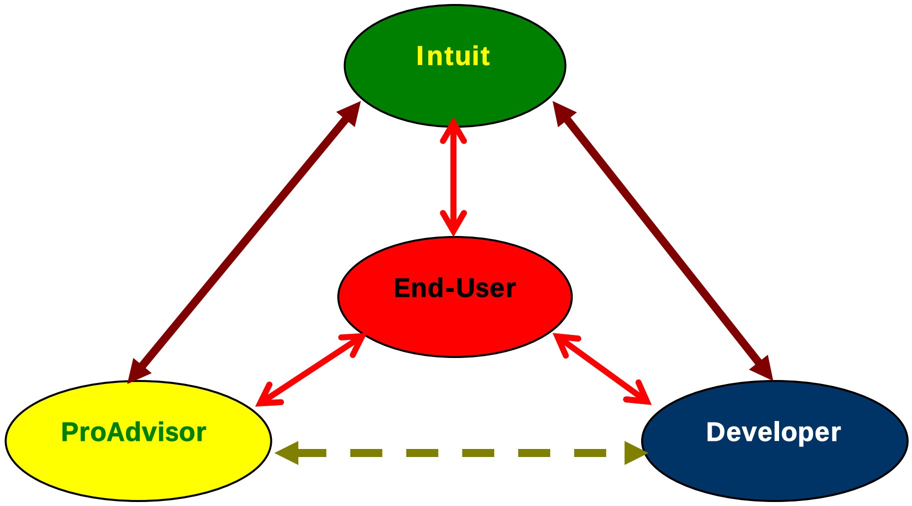
As ProAdvisors, bookkeepers, and CPA's we have lived in an arena that has been dominated by trained, structured, accounting professionals and we are now being pulled into the world of the end-user. In some cases this is happening faster than we can handle or to a higher degree than we wish to participate. Our world is changing dramatically due to consumer demand, it's no longer enough that we do their books, prepare their taxes, offer general business advice, review their books, and offer guidance and assistance with complex spreadsheet work-a-rounds to fill industry specific-needs. Our clients want more! And all parties involved feel growing pains. Change is here to stay, and we all need to learn how our lives will be affected as a result, and adapt to the changing industry we are a part of.

Enter the QuickBooks Integrated Application Developer…..

Early 2001 a newcomer enters the scene; the 3rd Party Developer. Intuit creates the Intuit Developer Network (IDN), opens the QuickBooks data file by means of a SDK (Software Development Kit), and along come developers who have created integrated applications that fill the needs of the end-user that are not met by QuickBooks itself, or the spreadsheet work-arounds that we as ProAdvisors have created. The thought behind the Inuit Developer Network was the "Right for My Business" and "Never Enter Data Twice" (NED2) philosophy at Intuit.

In a *perfect world*, one would think that all parties involved would have a strong relationship with the other. After all the goal of the three major parties involved (Intuit, ProAdvisors, and Developers) is, or at least should be, the overall satisfaction of the end user; or what was best for the end user.

The relationship picture should have looked like this, with the key players (Intuit, Advisors, and Developers) surrounding the customer – or perhaps a little more simply stated – all three key parties forming a relationship that would provide the end-user with the best that each could offer.



What we really see is a very different relationship pattern than what we have been used to.

- Intuit has an established relationship with the ProAdvisor
- Intuit has a new relationship with the Developer
- Intuit has an established relationship with the End-User
- The End-User has an established relationship with Intuit, the ProAdvisor, and now a new relationship with the Developer who offers solutions to time-consuming problems
- The ProAdvisor has an established relationship with Intuit and the End-user
- The ProAdvisor and Developer have barely had an introduction to one another … humm, now this is where it becomes interesting ☺

What about the new relationship between the ProAdvisor and the Developer?

I'd like to start out this section by stating that the following is "only my" recollection, thoughts and personal feelings about things – which could very well be distorted by the fact that although I was first a ProAdvisor; during the time that all of this was happening I had been a Developer for nearly a year and may have "missed" some things because I was "wrapped up in the world of being a Developer". Also for those of you that don't know me – well, I tend to be rather blunt and usually "tell it as it is."

I can clearly remember reading an article on the web stating that Intuit was creating the Intuit Developer Network, opening QuickBooks data, creating a SDK, and looking for third party developers to participate in the launch of this new endeavor. I can remember "signing" us up (*Sunburst*) and the resulting flurry of activity that resulted from this. However, I don't recall any "announcements" per se in either the ProAdvisor or ProConnection Newsletter that all of this was happening. I am also aware of some ProAdvisors who read the same article and signed up to participate in the IDN, not really knowing what it was, but thinking that it "sounded good."

As I recall, the announcement of the Intuit Developer Network (IDN) was thrust upon ProAdvisors without warning in late 2001. An announcement by Intuit was made that the QuickBooks Solutions Marketplace and "Applications that Work with QuickBooks" would be available January 1, 2002. Quite a shock to say the least and this is why I represent the relationship between ProAdvisors and Developer with a "dashed arrow"!

The reason they signed up, ProAdvisors had been looking for applications to fill the needs of their QuickBooks client and this somehow this seemed like it could be an answer. Unfortunately, end-users found out about the Solutions Marketplace at the same time as most ProAdvisors; and sadly, there were many end-users who 'educated' the ProAdvisors of this new program. It put everyone in a very awkward situation.

Again I'll digress for a moment to tell you why I feel this way. I remember January of 2002 (the launch of the Solutions Marketplace) as being a month of seemingly endless phone calls and extremely long hours.

End-user's called asking about our AIA Billing program which was listed on the Solutions Marketplace and our Certified Payroll program which wasn't listed on the Marketplace, but was available via our website (the SDK didn't provide enough functionality initially for us to rewrite our existing Certified Payroll program). End-user's were overjoyed at the prospect of "real solutions" instead of complicated work-arounds that were very time consuming and error prone. It seemed like they couldn't give us their money fast enough in order to purchase our products!

The calls that we received from ProAdvisors and CPA's were quite different. Instead of excitement in their voices – there was distrust, arrogance, even resentment in their tones most of the time. While there were of questions about how the programs worked – the explanations were abruptly interrupted with demands, not requests, for a free – fully functional – version of our programs. And to be honest, most of the time it seemed like they had very little knowledge of the problems that our programs were providing solutions for.

At first I was angry and confused by the reaction from ProAdvisors and CPA's. I simply couldn't understand the distrust and arrogance in their tones or the fact that instead of "asking" for a free trial – it was demanded. Then I realized…..it was all about relationships and had a good deal to do with communication, or rather lack of it, which was unfortunate for everyone involved. Instead of seeing this as a 'win-win-win' set-up, it was perceived as a 'Win, Win, Lose' relationship and the ProAdvisors/CPA's felt left out of the loop when their client's all the sudden knew more about what was going on than they did.

I had to "step back" and think just as an Advisor (not as a Developer)….how would I feel?

Here I am as a ProAdvisor with this client who I've worked with for years. I've spent hours and hours training them how to do things correctly in QuickBooks so they would have accurate financial and tax information; and they still make mistakes – just not as frequently. I also know that they spend literally hours each week or each month performing this industry specific task which I've helped them automate through Excel spreadsheets. Here they are, calling me up and wanting me to check out this "new" 3rd party program that's supposed to automate this task even more, claiming to turn hour's worth of work into minutes. *YIKES!* The questions that would run through my mind:

- "Who" are the people who developed this product?
- What kind of background do they have?
- Do they know and understand QuickBooks?
- Will it muck up the clients financial and tax information?
- How long has this product been available?
- How do I know this program will work? I know the spreadsheet solution does.
- I'm not sure that I even thoroughly understand this task, how can anyone else?
- How can I recommend something I've never used?
- Does this mean I have to buy and learn a new program, who will teach me? I can't buy every program my clients want to try, I'll go bankrupt … what am I going to say/do now?
- What if I do make a recommendation, the client buys the program, only to discover it really doesn't work.
    - Will they blame me?
    - Will I loose their respect?
    - Do I have to train the client? But I don't know how to use this new program, I'm going to look stupid!
    - Worse yet, will I lose them as a client?

These are just a few of the possible questions that would run through my mind as an Advisor. And those questions would lead to the emotions:

- Feeling overly protective

- Defensive and perhaps feeling threatened
- Fear of failure
- Distrustful
- Inadequate because I don't thoroughly understand the task or these new programs
- Excited at the possibilities, but concerned that my own business will suffer
- Overwhelmed at learning new programs and being educated on what's available
- ***STRESS!!!!!***

Human emotions always seem to dictate (regardless if this is a personal or business relationship) our behavior; whether it be tone of voice or body language. As an Advisor, I would pick up the phone, make the call to this unknown entity….and guess what – I would have an attitude. I would come across as distrustful, arrogant, and demanding. *Ouch!* I certainly didn't mean it, but it still happened.

After stepping back and thinking just as an Advisor, I could now understand ***why*** the calls we received from ProAdvisors and CPA's were so different from the calls we received from end-users!

- The End-User looked at Developers in the same way that they looked at Advisors – Developers were someone who could help them with a problem.
- Intuit looked at Developers in the same way that they looked at Advisors – the Developer could offer something that they couldn't; industry-specific solutions.
- Advisors looked at Developers as an unknown – someone who might come in and wreak havoc with their clients' data.

Imagine, if you will, being at a party where you are involved in a discussion with another guest; when all of a sudden someone unknown to either of you just butts right into your conversation without so much as an introduction. Pretty rude and nervy isn't it? But unfortunately that's pretty much the way that Developers arrived into this relationship, because initially Intuit didn't make the necessary, and proper, introductions between the two groups as I recall. Instead they thrust the announcement of the QuickBooks Solutions Marketplace, Developers, and 3rd party applications upon Advisors, making Developers 'that rude and nervy party guest' who just butted right into your conversation. And the Developers, well they were really in a similar situation as the ProAdvisors. They didn't realize they had 'just surfaced,' many of them had been coding add-in programs for some time, they just weren't mainstream.

All in all this was not a very pretty picture that I was painting in my mind; after all I have first hand knowledge of just how rewarding and beneficial a relationship with a Developer really is … and this is why I represent the relationship between ProAdvisors and Developers with a broken line.

My own personal experience is of being a ProAdvisor with a time-consuming and error prone problem that was "solved" through complicated Excel spreadsheets with a lot of duplicate data entry finally met a Developer and **"together"** we created a solution to that problem. Which even after 6 years and 2,000 users is still solving problems for new end-users every day – and it has been one of the most rewarding experiences of my bookkeeping career. It has also been one of the strongest influencers behind my participation with IDNAC.

I think even Intuit realized this lack of introduction between two vital groups to be a mistake, and personally I think it was one of the reasons that the IDN Conference was held in December 2003 – to bring the two groups together, to introduce them and to start forming the building blocks to a relationship between the two groups. Heck, they even did a session on "How To Date a ProAdvisor" – remember that? However, there were only 100 ProAdvisors in attendance, given how many Advisors are enrolled in the ProAdvisor program, that is just a tiny fraction.

*So….how do ProAdvisors and Developers forge relationships? How do the three key players work together for the **good** of the end-user?*

These are just some of the things that will be discussed next month! As you can see, it would be a huge disservice to try to wrap this series of articles up this month. One of the main goals of our newsletter and site is to bridge the gap in communication between ProAdvisors and Developers; but it is important that everyone truly understand the struggles each side face, both then and now, in order to work efficiently and effectively **together**.

Until then

Nancy