How ProAdvisors Discover and Evaluate Solutions

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Session Agenda

- The ProAdvisor's role
- Identifying the need
- Discovering solutions
- Evaluating solutions
- Real life learnings

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The ProAdvisor's Role

- **Support clients**
- **Recommend complete solutions**
- **Help identify useful information**
- **Coach, create, suggest procedures**
- **Trace where data comes from**
- **Identify the need for additional software**

•Teaching B.O. and QB users, how to identify useful rather than useless info.

•50-60% of our time is spent coaching, creating and suggesting office procedures and managerial

reports that will track and measure financial goals and accomplishments

•Advisors trace where data comes from, what data exists, what's missing or needed, and where data needs to go for reporting analysis. Often including who should have access to what, and segregation of duties

•This "discovery" process, often leads to the demand for additional software

Identifying the Need

- **Who discovers the need – the client?**
- **The role of the business consultant**
- **Who is focused on technology?**
- **When you think about profitability, who is measuring production**
- **Client's survival depends on efficiency**
- **Educate about QuickBooks integration**

•The Accounting Office and the evaluation of technology..

•Think about who is focused on Technology:

CPA? Business/Management Consultant? Computer Consultant? Internet Consultant?

When you think of measuring profitability, who is measuring production?

•Your clients survival depend on efficiency, but how do they update their QB integration knowledge?

•Like the woman who takes her car to the mechanic, clients take their business to a consultant because: "They know it's not running right, but they just don't know what's wrong"

•Reflect on your existing clients; Focus on the one's that asked you for better automation; How did they find you? Where did they come from?

•How would you educate your QuickBooks User's about their integration possibilities?

Identifying the Need

- **Evaluate the type of problem**
- **Understand what is the client looking for**
  - The reason they are unsatisfied
  - The primary complaint
- **Discover what causes the staff to be unproductive**
- **Assess strengths and weaknesses in the environment**

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•Identify with the Business owner's needs; go to the next staff meeting:

Tell them to make a "wish list", in order of importance. Pose questions like:

a. What is the primary reason they are unsatisfied with the current system?

b. What is the primary complaint from the staff? And customers?

c. What causes the staff to be unproductive?

•Advisor's identify the strengths/weaknesses of the environment

Is it lack of training or support, lack of software or integration?

•Finally - What's the format of the existing data, what's needed, what's luxury and what's necessity?

Discovering Solutions

- Solutions Catalog
- Solutions Marketplace
- Online Forums - posting
- Colleague Referral

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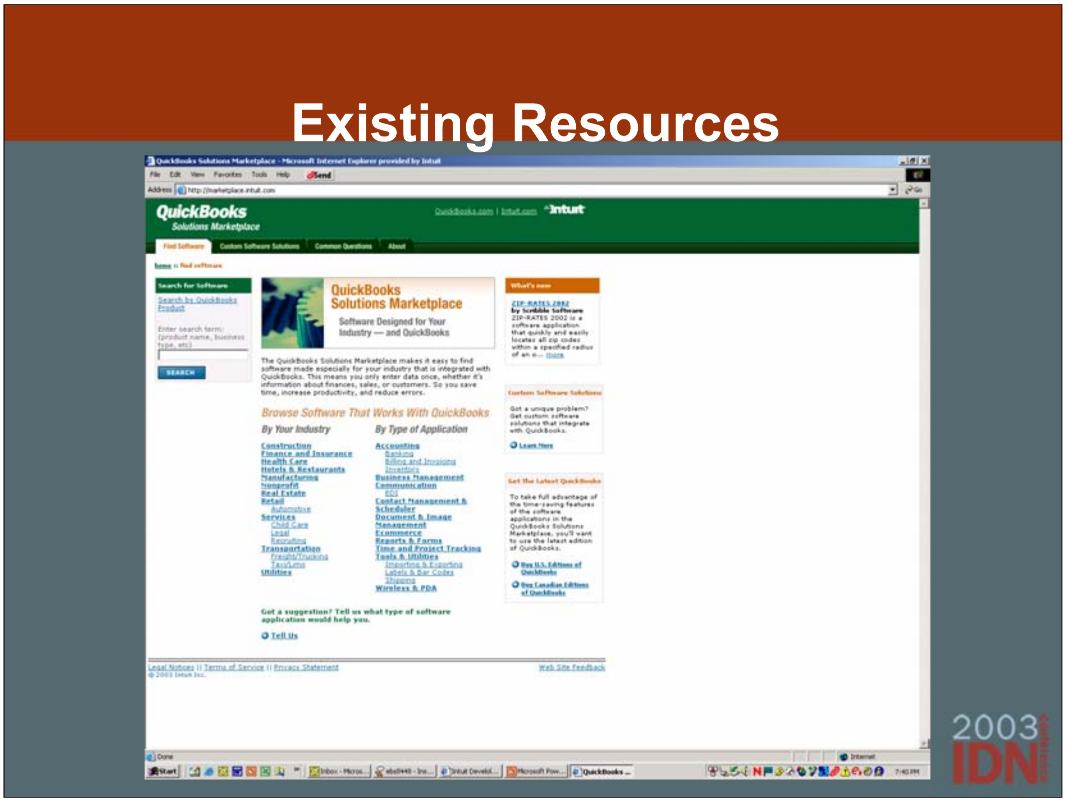
Existing Resources

- •http://marketplace.intuit.com/accountant
- •IDN Solutions Catalog, the W.O.W. factor for clients



•http://marketplace.intuit

•Arm the client info they can share with their technical support staff

•Homework: Review this site, with their wish list close at hand

Existing Resources

- http://developer.intuit.com
- IDN Membership, the W.O.W. factor for developers
- Inform them about the resources that are available

Evaluating Solutions

- **Hardware and software requirements**
- **“User Friendly” standard**
- **Full working evaluation copies, demos or data flow charts**
- **Technical or detailed information**
  - Demonstrate features, screen shots, tables
- **Training and support**
- **Company history**

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•What special hardware or software is required?

•Is the software user-friendly? Ex.- Time Matters

•Trial Versions and Online & Live Demo’s ~ “Webex” Style

•Feature Charts, Screen Shots, Flexibility (Is customization required? or allowed?)

•Technical ? Ex: Kind of Reports? Syn: Real-time or Post-time? (Batching or Transactional)

•Clients want to know, “How long has your software or company been around”?

•What kind of support/satisfaction guarantee do you offer?

Developing Custom Applications

- **Necessary to network to identify software provider**
- **The ProAdvisor is a "bridge" between the client and developer**
- **Often a new developer for each project**
  - Experience with QuickBooks SDK
  - Experience with specific data structure or environment

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•When faced with "fragmented-data" or existing third-party applications, contact the software designers and programmers, explore integration solutions.

•Third-party developers seem anxious to tap into the market of 3.6 million QB users

•Post questions on the developer forum, and begin the "match-maker" process.

•As an advisor, I look for experience with SDK and QuickBooks

•As a developer, I look for experience with the type of data-structure, or environment

such as "Access" or "Visual"

Real Life Learnings

Typical project description: case study

- **Data migration**

Suggestions for developers:

- **Recommend developers work on referral commission basis vs. charging dealer fees**
- **Refine ads in Solutions Catalog**

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Observation:

Loose Management Styles, require more structure,

Structured Management Styles, require more flexibility

Case Studies: PBR Inc & IT