



Dear Andy Advisor is written by Bruce Andersen

Dear Andy:

I really want to ask a Developer about his program, but I'm not sure where to start. I know what I 'think' it does, but it seems to do so much more. How can I ask the developer to explain a few more details about his program and how I can best use it without offending them?

Signed: Need some guidance.

Dear G.....,

First most developers will have information on their website, so I would start there. Next, I have found that developers are eager to assist advisors with gaining a better understanding of their programs. They either have periodic web casts for training or can do one-on-one training and demos through the web.

Remember, you are representing the client, so you MUST be able to advise the client if the solution will work for them.

I have also found that developers will assist in the training, implementation and installation of their software, so all of this is not on your shoulders.

You are the quarterback to the engagement, so get the right software and the right team together to make the installation a winner for your client.

Sincerely, Andy

Dear Andy Advisor:

Is it appropriate for Developers to ask Advisors for client references before referring clients to the Advisor for QuickBooks help?

Signed: Doubting Developer

Dear D. Developer:

This is a fair question to ask of an Advisor. First, the references will give you a "Go/Not Go" kind of test. Does the advisor have the background to properly assist you (the developer) with broadening your support base?

Secondly, I think that direct inquiry with clients can give you insight as to the strengths of the advisor. If the advisor is "okay" or "good", you may be able to provide the right kind of nurturing to make the advisor "great".

In the final analysis, if there is a certain skill set just missing with the advisor, then you may want to tell the advisor that you MUST do all of the technical work yourself, but you are very happy to have the advisor "sell" your product.

As a developer, you must maintain the standards that you set which will provide the end-user client with the best installation.

Sincerely, Andy