# intuit.

## Intuit Professional Services

# Set your firm up for success in the cloud

# Intuit Professional Services

## Comprehensive services tailored to your business needs

Intuit Professional Services takes a holistic approach to making improvements, whether it be centralizing your QBOA architecture, optimizing workflows, or scaling your cloud knowledge base. We can create a strong foundation, regardless of where you are in your cloud accounting journey.

By addressing your firm's particular needs, we can simplify your journey to the cloud, increase efficiency, and give you better visibility, control, and security of your QBOA environment.

## We can help you find efficiencies, explore your potential, and reach your goals in the cloud with the services that fit best, including:

**1** **Planning and design**

It can be hard to know where to start when dealing with such a large scope. We'll help you step back, take aim, and come up with a plan that fits your situation and reaches your goals.

**2** **Workflow consulting**

We'll start by concept mapping your clients' current workflow, evaluate which Intuit products and apps make the most sense and then implement our recommendations so your shift towards optimization in the cloud is painless.

**3** **Practice optimization**

Based on the way you currently operate, we'll help your firm put the proper tools, processes, and governance in place to smooth your transition to a cloud based practice. We'll assist with a Project-based approach to rolling out your new cloud accounting business model.

**4** **Custom training services**

An Intuit Training Consultant will root themselves in your employee's current state, create a framework based on your learner's goals, and then deliver a customized training program in a way that best suits them.

**5** **Add an Intuit Account Delivery Manager (ADM)**

The ADM integrates into the day-to-day operation of your Firm, and manages things like escalations, navigating Intuit resources on behalf of the Firm, providing Quarterly Business Reviews, and data insights and governance. They help you define your business and reduce the burden on your IT staff.

# Intuit Professional Services

## Consultation Process
### Client Engagement

| Discovery | Road Map Development | Implementation |
|---|---|---|

| Needs assessment & vision development | Strategic design | Alignment validation | Deployment actions | Delivery | Growth & continuous improvements |
|---|---|---|---|---|---|

**Deployment Recommendations**

**Project & Change Management**

**Professional Services**

## Key business benefits

- Structured approach to change
- Leverage industry expertise

- Solid partnership with an industry leader
- Positioned to react to rapid change

- Always up-to-date Cloud Software
- Ability to impact/influence QBO design

## Our process

The Intuit Consultation Process is at the centre of all Intuit Professional Service solutions. We follow the same collaborative methodology and incorporate direct feedback to ensure a mutually successful partnership with your firm.

## Gain a lasting edge

By controlling and structuring the process and design of how you use QBOA/QBO you can unleash the full value of people, process, and technology. Reaching your full potential means your organization can confidently stride toward the future.

You can reduce risk and complexity by using our broad expertise, deep knowledge of QBOA/QBO and concentrated focus on your specific challenges to accelerate adoption, strengthen your team's capabilities, and sustain success.

## Rely on a project-driven approach

The Professional Services team at Intuit follows a PMI project-based methodology that provides structure to the delivery of our Professional Services offerings at each point of the consultation process. ProSci® Certified Change Management and Communication Planning services round out our offerings.

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# Intuit Professional Services

## Consultation Process
### Step-by-step

### Discovery

#### Step 1:
**Needs assessment
& vision development**

- To understand your specific needs, we will work directly with a cross section of stakeholders in your organization.

- We'll ensure you're protected with an MNDA before having an open-ended discussion about your business, moderated by a mix of Intuit subject matter experts that will level-set with your KPIs and uncover your growth goals.

#### Step 2:
**Strategic design**

- We will create a customized QBO/QBOA structure and app stack that suits your clients and reaches your goals.

- Recommend how you can introduce change in a controlled way so you can start saving time by getting the most out of cloud accounting.

### Road map development

#### Step 3:
**Alignment validation**

- We'll review the design with project leads/owners to gather feedback and validate KPIs, reworking the design as needed.

- Once the strategy design is approved, we'll detail the framework of our partnering agreement and engage the approved app partners to complete the agreement.

#### Step 4:
**Deployment actions**

- Get aligned with all stakeholders (ie. You, Intuit, and app partner leads) and form cross-functional teams as required.

- Create a clear escalation path with representatives from your firm and Intuit, to resolve any issues that may come up.
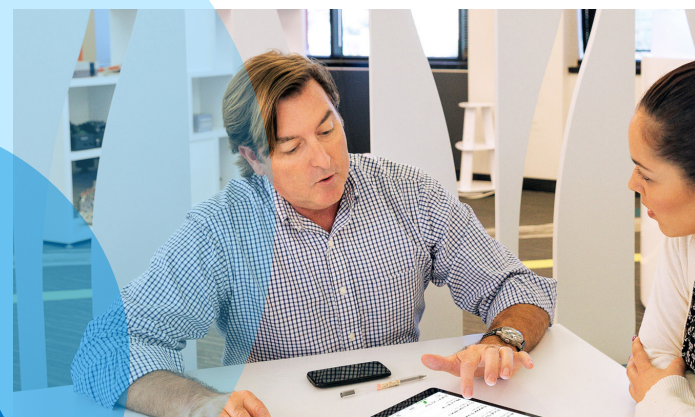
### Implementation

#### Step 5:
**Delivery**

- We'll coordinate and deploy our plan, controlling the change in your organization so the shift is painless.

- We'll assist you with client onboarding, migrating your data, QBOA administration, QBO support, and a variety of other professional services, depending on our strategy & approach.

#### Step 6:
**Growth & continuous improvement**

- A lite version of the Consultation process can be repeated to drive continued KPI alignment & home in on healthy, sustainable growth.

# Workflow Consulting

## It's the way your clients work, but better

Every workflow consultation begins with understanding how your clients work first, so we can identify opportunities and implement changes that makes sense for you and your clients. Your Solution Architect will make a series of app recommendations that consider your current workflow and optimize it for the cloud to streamline and simplify processes.
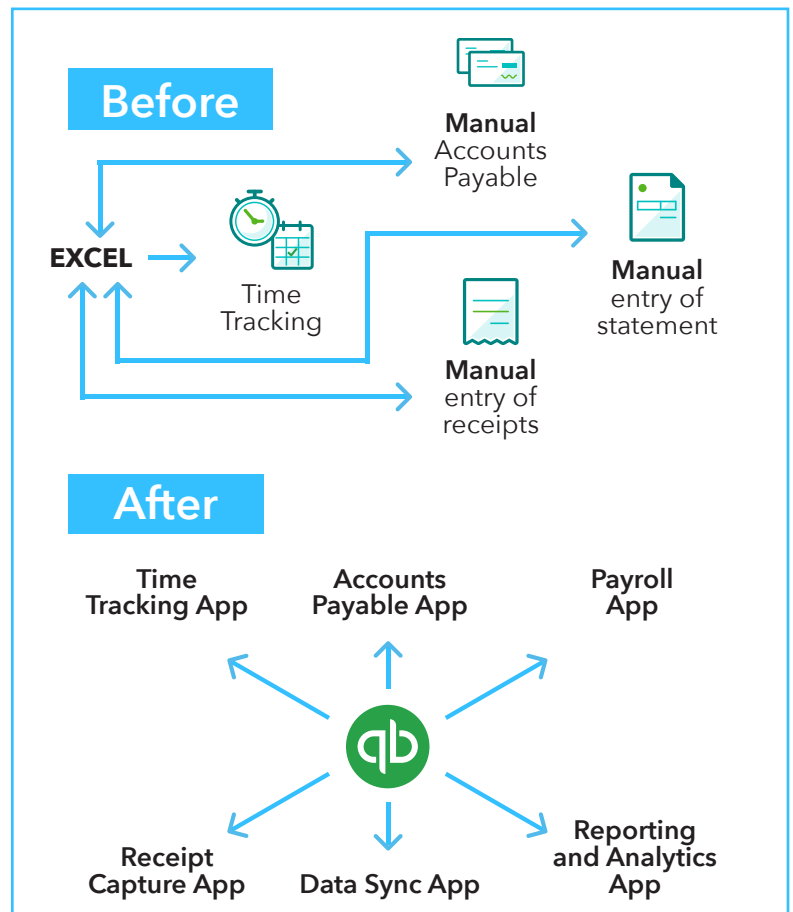
## How we help

Solution Architect on-site visit to understand your clients and their:

- processes
- pain-points
- needs

Concept map your current flow, identify sticking points, consider the best options and discuss trade-offs.

Create a cloud solution that fits your clients' needs and helps you both succeed.

## Workflow consultation example



**Before**

EXCEL

Time Tracking

**Manual** Accounts Payable

**Manual** entry of receipts

**Manual** entry of statement

**After**

Time Tracking App

Accounts Payable App

Payroll App

Receipt Capture App

Data Sync App

Reporting and Analytics App

# Practice Optimization

## Remodel the way you work (for the cloud)

Regardless of your organization's position on innovation and new technology, it doesn't change the fact that you need to be well prepared for the years ahead. You can do just that, with Intuit Professional Services helping you increase efficiency, improve communication, and offer more high-value services.

## Change is hard but it doesn't have to be

Intuit Professional Services can help you control your change so it's a smooth transition. Starting with core accounting processes like accurately recording business transactions and performing external and management reports, we'll take your current state and optimize it for your future state (in the cloud).
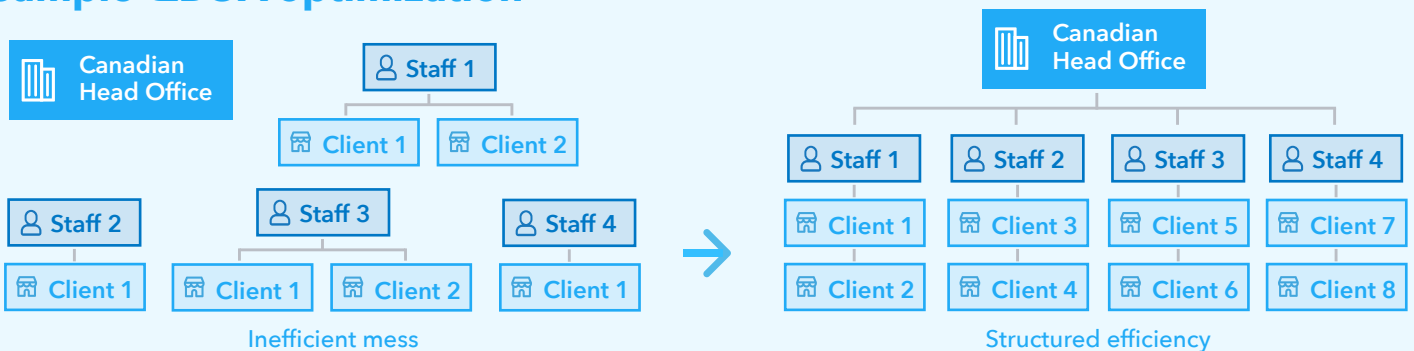
## How we help

Solution Architect will create a model of how you're currently optimized based on:
- policies
- procedures
- workflow
- schedules

Make recommendations that optimize and remodel your workflow for the cloud. (increasing efficiency and accuracy)

Implement the changes and offer custom training for your personnel to ensure they're achieving and sustaining benefits.

## Sample QBOA optimization

Canadian Head Office

Staff 1
- Client 1
- Client 2

Staff 2
- Client 1

Staff 3
- Client 1
- Client 2

Staff 4
- Client 1

Inefficient mess

→

Canadian Head Office

Staff 1
- Client 1
- Client 2

Staff 2
- Client 3
- Client 4

Staff 3
- Client 5
- Client 6

Staff 4
- Client 7
- Client 8

Structured efficiency

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# Practice Optimization
## Why optimization matters



Addressing the need for innovation within a firm is difficult but it's required for those who want to remain relevant in a changing landscape. Here are a few reasons you should consider optimizing your firm:

## 1 Change the way businesses see you (for the better)

While you may be an established and respected firm, business owners are very likely to view outdated processes as a sign of outdated industry knowledge or practices. For clients who use cloud storage in their business, for example, encountering a firm that cannot securely accept file uploads will most likely result in the client's quick exit to a more cutting-edge organization. As a result, clients will expect you to be informed and capable of helping them transition their business.

## 2 Clients are looking for collaborative long-term growth strategies

Gone are the days when business owners simply left us alone to pour over financial reports and data. Now, owners want to collaborate with us on long-term business growth strategies that are informed by current best practices. We must prepare for deeper client involvement by expressing complex information in jargon-free, concise language. Rather than just handing clients their financial reports, we must learn to explain the stories behind the data in the report, crafting clear strategies that align with the client's goals for their company.

## 3 Go from reactive accounting to proactive business development

In the past, accounting was reactive, looking backward to what happened and trying to find an explanation. Now, clients expect us to be prudent, charting a path forward based on the most current data. As clients grapple with new technologies and policies, we will need to be at our clients' sides, helping them navigate the complex world of business management towards success.

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# Custom Training

## Identify knowledge gaps and fill them

Intuit Training Consultants bring a holistic approach to customized training. Every solution our Training Consultants creates is uniquely tailored to fit that particular organization's brand and learners. Through the innovative use of technology and fundamental instructional design principles, we collaborate with you to elevate your Accountant's QBOA skills.

Work hand-in-hand with you to:

- Assess current state
- Understand your learners
- Set goals
- Consider options

Develop a roadmap and training framework that fills the knowledge gaps and reaches your goals.

## Intuit Training Consultant

Deliver training in the way that best suits your learners ie. Classroom, webinars, self-paced e-learning, or a mix.

Create a customized training program based on your learner's needs and the goals we set.

# Custom Training
## Methods & topics

## Flexible custom training methods

### Classroom
Learners attend a traditional classroom session at an Intuit training center or other physical location. Students collaborate and learn face-to-face with peers. This modality is available for public and private group courses.

### Webinar
Learners collaborate, learn, and interact via two-way audio with an instructor that is teaching in a real-time, virtual environment. The course is taken over half-or full-day sessions on one or more consecutive days. This modality is available for public and private group courses.

### Self-paced (e-Learning)
Students complete work online at their own pace, without instructor or peer involvement by using the tools contained in the recorded course. This also includes materials that have been recorded for post-webinar training.

## Training topics available

There are many modules within each topic (too many to list here). So, depending on the knowledge gaps we're trying to fill, either entire topics or individual modules can be extracted and taught as needed.

### QuickBooks Online topic examples:

- Why QuickBooks Online?
- Identify clients who are a fit
- Getting started in QuickBooks Online
- Converting to QuickBooks Online
- Client onboarding
- Sales and customers in QuickBooks Online
- Expenses in QuickBooks Online
- Online banking
- Company activities in QuickBooks Online
- Client file setup
- Accountant tools, tips, and customizations
- Tracking tools in QuickBooks Online
- Standard Payroll in QuickBooks Online
- Year-end client work (NTR)

### QuickBooks Online Accountant topic examples:

- Getting started in QuickBooks Online
- Accountant
- Workpapers in QuickBooks Online Accountant
- Using Intuit products for tax filing ie. Pro Tax & ProFile
- App recommendations
- Work tab in QuickBooks Online Accountant
- CPA access for annual filing (Accountant toolbox)
- Super user content

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# Account Delivery Manager (ADM)

## Scale change with dedicated Intuit expertise

Once we've agreed on the strategic design and approach for your unique situation, you can engage an Account Delivery Manager (ADM) to deliver and build on our approach. They'll integrate themselves into the day-to-day operations of your firm and manage things like escalations, navigating Intuit resources, providing Quarterly Business Reviews, and gathering data insights that help you define your business as it changes.

The Account Delivery Manager provides an enhanced level of support to ensure a smooth, seamless transition from the road map we've developed together into full launch.

## Your one-stop-shop for support & escalation

**ADM Highlights**

- Support your evolving business needs
- Single point of contact for product support
- Provide improved customer service & end-user experience
- Increase employee productivity through training and education
- Help clients adopt increased functionality
- Reduce burden on your firm's IT staff as it's released
- Smooth client onboarding & migration

# What ADMs do & the benefit to you

## Account Delivery Manager's responsibilities:

### Liaison across products
Consolidate contract management & connect with product teams on support-related issues.

### User & client management
Access back-end user management tools to add and revoke firm staff access to various QBOA accounts as requested.

### 1:1 training
Deliver 60-minute one-on-one tutorials to new staff, and proactively communicate new product features as they roll out.

### Support & escalation
Act as your staff's one-stop-shop for technical questions and provide high-quality escalation management (e.g. ticketing system).

### Insights & analytics
Provide data insights and performance metrics reporting customized to your firm's requirements.

### Continuous process improvement
Use a lite version of the consultation process to identify gaps and develop corrective plans using one or many of the other activities.

## Benefits to your firm:

- Improved customer service
- Reduced help desk calls
- Smooth client onboarding & migration

- Consolidate your QBOA admin
- Centralize your QBO governance
- Significantly reduce user management

- Increase productivity through training
- Take advantage of the latest functionality as it's released

- Increase the quality and consistency of each support interaction
- Reduce technical and admin overhead

- Get insights and analytics to make informed strategic decisions about thedirection of your business

- Secure a strategic partnership that supports your business strategy
- Get the expertise and experience to  assess, design, and implement technology and training to support your evolving needs