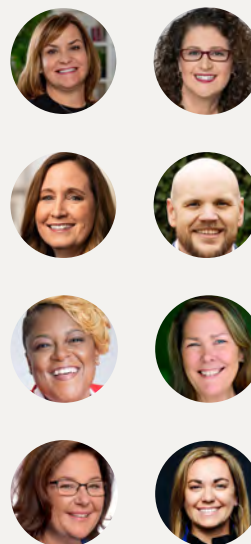


# A new way of thinking about who's right for QuickBooks Online

Wondering which clients are right for QuickBooks Online?  
We spoke to 8 leading accountants and ProAdvisors who told us  
that might not be the right question.

## We talked to 8 cloud-based accountants who've made the switch to QuickBooks Online.

Here's a guide based on their advice about how to think through what's right for your clients—and what's right for your business. You can use it to help you decide which clients to approach about making the switch.



## Look beyond previous practices

Are you still driving to a client's office to spend hours manually entering data? With the automations and real-time collaboration built into QuickBooks Online, you can give up those drives. Use the time you save however you want—bring on more clients, grow your practice, and move beyond transactional conversations.

If you haven't already, you can start by converting your own firm's accounting to QuickBooks Online. Knowing the product and how migration works can give you more confidence in approaching your clients about making the move.

Migrate your clients one at a time, or consider switching your entire client base at once. No matter your plan, starting these conversations now can ease the transition. For the few clients who feel that migration is not possible, you can keep the conversation open.

Join the [ProAdvisor Program](#) for free, and get access to QuickBooks training designed by and for accounting professionals.

## Using QuickBooks Online with its connected suite of tools and third-party apps doesn't just replace QuickBooks Desktop—it helps your clients work smarter and grow their business.



### Future-proof & grow your accounting firm

More than half the accountants we spoke to told us that as adoption of cloud accounting software has grown, they've experienced an important shift in their business model. Changing from hourly billing to a fixed-fee model has improved their income streams while providing more flexibility to clients.

When your clients' routine processes are automated, their real-time data will be at their fingertips anytime they want to see it. Your schedule will be freed up to provide insight and strategize on how clients' businesses can blossom—and you can be more available for real-time questions as needed.

It's easy to see the benefits of migration. But how do you know which clients to convert first?



### Address industry needs more easily than ever

Generally speaking, the simpler the business, the simpler the migration. For your first few migrations, look for clients with fewer lists and items, and less monthly transactions. Often, service-based businesses meet these criteria, and can more easily see the benefits of switching to the cloud, so you might consider starting with them first.

Another tactic is to start by converting a few clients in a particular industry to get a feel for the process. After that, use the same recipe for each client in that industry, since their workflows and needs will often be similar.



### Better solutions for nearly everyone

Accountants we've interviewed feel that QuickBooks is the leading company in accounting software, and the apps that integrate with it are at the top of their field.\* For a growing number of businesses, QuickBooks acts as the core accounting center of an ecosystem with data coming in from these additional apps. Some points to keep in mind:

- Using QuickBooks Online with its connected suite of tools and third-party apps doesn't just replace QuickBooks Desktop—it helps your clients work smarter and grow their business.
- You can help your clients craft a suite of integrated software tailored not only to their industry, but also to their unique business needs in ways they never knew possible.
- Even complex businesses with inventory, manufacturing processes, and retail can use a combination of QuickBooks Online Advanced with the apps that suit their needs, to create one powerful financial ecosystem.

**When businesses hesitate to migrate, it often comes down to a natural human fear of change.**

## **9 tips for turning the risk-averse into the cloud-empowered**

Your tech-savvy, early-adopting clients will be open to a cloud migration strategy. What about your “old-school” clients? Here are some accountant-approved tactics to help address your clients’ potential fears and convince them to move forward:

- 1 Meet in person**, ideally. If not, opt for a real-time video call so you can read their body language and adjust your approach accordingly.



- 2 Listen empathetically** to pain points and frustrations, both about current processes and changing systems.

- 3 Engage in a thorough discovery** to identify the best package for each client’s needs. They’re the experts in their business, and collaboration will produce the best result.





**4 Research the suite of connected tools and third-party apps\*** to help your clients customize the way they work, meet industry-specific needs, and more. Discover [The connected suite of QuickBooks business tools](#) and [Third-party apps for the unique needs of your business](#).

**5 Provide a live, customized demo** to show your client how QuickBooks Online can help save them time and effort. Seeing features in action can be a revelation. If you don't feel comfortable giving a demo, sign them up for one of the many [introductory webinars](#) offered by QuickBooks.



**6 Assure security-concerned clients** that if they bank and shop online, they can manage their accounting online. Intuit, the makers of QuickBooks Online, takes data security seriously. Data is encrypted on Intuit systems and authentication is required to access the product. Keeping a business' books on one desktop computer or a server can be more risky, in the case of fire, theft, ransomware, or other physical threat.

**7 Propose migration as a phased approach.** After your clients experience a new way of working online, roll out enhancements one at a time—such as payments, payroll, or an industry-specific app.\* Communicate consistently throughout and offer training as needed.



## 8 Offer to train your client's team, post-migration.

Educate team members involved in the process about the whole solution so each can see how their work fits into the big picture. Consider offering support through an instant messaging platform for time-sensitive needs.

**We can show your client around QuickBooks Online to make sure they can tackle everyday tasks. Sign them up for a 1-hour personalized setup session by calling 1-800-459-5183.**

9 **Keep an eye out for complex businesses' next big change.** Some who have invested in their processes may not be ready to migrate at this time. If that's the case, work with your client to identify a natural opportunity for migration, like during their next IT system change; switching to QuickBooks Online can enable clients to simplify their IT requirements, saving time and money.



**It all comes down to one question: what is your time worth? You can use the time you save with cloud-based tools to grow your practice, and move beyond transactional conversations.**

## Leverage the trust you've built

Your clients look to you for guidance through a landscape of new tools and processes. If they haven't asked you about making the move to the cloud, they might be waiting for you to bring it up. Now you can reassure them they have your support at every step of the migration to QuickBooks Online.

## THANK YOU

We're so grateful to the accountants who offered their time and insights for the creation of this guide:

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