

Discover the Power of the Cloud

A SIMPLE STEP-BY-STEP GUIDE
TO MOVING YOUR PRACTICE ONLINE



Prepared for you by
Stacy Kildal and Intuit Inc.



MOVING YOUR PRACTICE ONLINE

by Stacy Kildal



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I'm a huge fan of working anywhere except my office. In fact, one of the main reasons I started my own business almost 10 years ago was to have no one to boss me around. But, the real benefit of running my own office is that it is a way to have more flexibility and control over my own schedule.

I started my business because I wanted to be my own boss and have control over my own schedule. Since starting my own business, I have transitioned my practice online, meaning I use Intuit's online products and several third-party online apps to service my clients. The result: I am able to work with any client, anywhere and I work the way I want, when I want no matter where I happen to be. Many of you are contemplating moving your practice online. **With this document, I hope that sharing my experiences and what I learned along the way will help you make the transition and create a smooth process for you and your clients.**

So how did I make the jump to moving my practice online? Well, it was 2003, and I was working full time as a bookkeeper for a plumbing company. While I really liked the people I worked with, I found that I could still do my job effectively without being in the same office with them eight hours a day. The afternoons were mostly spent calling in building inspections; I had a Palm Pilot with a database of all the active jobs we had going on and all the critical information — lot numbers, building department phone numbers, and permit numbers. When requests for these inspections were called in by crews, I realized I could easily manage them by updating and syncing them from my Palm Pilot to the file on my computer. Basically I **COULD TOTALLY WORK REMOTELY**. I let my boss know this, but unfortunately, he didn't understand and thought I had to be in front of my computer to track everything.


In 2004, after working as a contracted bookkeeper for a number of clients as a “side job,” I realized that I needed to make a major decision: stay with my full time job, which was stagnant, or start my own business from my side job, which had a growing client list. I wasn't quite at a place where the clients replaced the job's income...but I was

CLOSE. As soon as I joined the ProAdvisor Program® and became certified, I was able to get enough clients to make the jump. I gave my notice, formed my company and was on my own!

It wasn't until 2007 when I was pregnant with my second child that I began to understand how everything I was doing for my clients could be done not only from my own office at home, but from really anywhere. I realized that moving my clients online would allow me to recover from my son's birth and spend time with him all while still being able to engage with my clients. So I started the process of converting clients to an online model. To start, I offered my clients a 5-10 percent drop in monthly fees since I no longer had to charge billable drive time. That way my clients saw an immediate benefit as I transitioned them online. And of course, the benefit for me and my family was that I could stay home with our son and spend time with my older daughter!

As I moved my clients online, I found I had more spare time. I started posting answers to help forums, which people from all over saw and resulted in building a brand for myself. I started getting clients who were scattered across the country and whom I immediately set up remotely. **With this new business model, I went from having a 100% local client base that I used to have to drive all over the place to service, to having about 75-80% out of state!** My transition to an online business was complete — and I've never looked back.

If I can do it, you can do it. Here's my step-by-step guide to moving to a remote, online practice. Some parts may work for you, and some may not. You may find that you need to switch the order around. Each practice is different, and we all have different clients, but there are certainly similarities in their expectations of us, and “I'll get back to you tomorrow when I'm in my office” doesn't really fly anymore. That being said, I really hope this is helpful to you!



□ STEP 1

Join the QuickBooks U.S. ProAdvisor Program. This program offers great resources to grow your practice. As a QuickBooks ProAdvisor member, you get product discounts, ongoing training and product certification, free QuickBooks Online Accountant, assistance with marketing your practice and much more. Within two months of joining the U.S. ProAdvisor Program, I had billed enough through engagements facilitated by the FindAProAdvisor.com website that my fees to join the program were paid for!

□ STEP 2

Find the technology that will allow you to work remotely. This needs to be in place before you can really start. For me, it was a combination of QuickBooks Online and using Teamviewer.com to remote into client computers. QuickBooks Online (and QuickBooks Online Accountant) have allowed me and my clients to work on the data independently — even at the same time if necessary. Unless I'm doing support or training, I don't need to log into a client's computer for bookkeeping tasks. If you decide to use Teamviewer.com, you will need to train your clients so the tool is useful. Teamviewer.com won't work if your client forgets to leave their computer on; doesn't have the program running or is working on their computer when you try and log in. You also need to consider the hardware. I decided to switch to Mac in 2012 so that I can support all of my clients. I can support with native software clients using QuickBooks Mac and QuickBooks Online, and I service QuickBooks Pro, Premier and Enterprise clients with a hosting service.

□ STEP 3

Offer an incentive for existing clients to move online (if they resist). Explain that you are still able to serve them, and possibly serve them even better, because you won't be wasting time traveling. I determined my savings in fuel, time and mileage and passed it along to clients as a reduction in their flat monthly fees. I asked the ones that were REALLY resistant to try it for one month, and if they really didn't like it, I would refer them to another local QuickBooks expert. I ended up only losing one after the switch to online.

□ STEP 4

Bring any new clients on as remote right away. Find a system that works for you, and explain to prospective clients that is your process and what the benefits are from their perspective. I let possible new clients know that we will most likely be working with QuickBooks Online and some SaaS add-ons like SOSInventory.com and Bill.com.

□ STEP 5

Provide value/flat fee pricing. Back in the days of having to go from one onsite appointment to another, I billed hourly. These days, with the automation options available in online software, combined with the always-on access, I offer flat fee pricing and monthly billing. I have an in depth interview with the client regarding options, expectations and existing workflow. Together, we determine what roles and responsibilities each of us will have, and then I determine a fee per month. We both sign an engagement letter, then the client signs an authorization form allowing me to charge their credit card or do an EFT payment each month. This simplifies billing for me, establishes clear expectations between me and the client, makes budgeting easy for them, and doesn't penalize me for being super efficient and therefore billing fewer hours!

□ STEP 6

Specialize. Find a niche — whether it's software applications (like I did with QuickBooks Online and other mobile solutions), a feature (inventory) or an industry (health care providers), find something to specialize in and become an expert in that area. Get to where when people in your community think of this specialty, they think of YOU and only you!

□ STEP 7

Market yourself! Today, with social media, marketing is so much easier. As some of you may know, I'm also the cohost of Radio Free QuickBooks. Using primarily social media, we were able to go from 12 listeners a week to over 10,000 in less than two years and we did it with nary a dime to spend on marketing. Twitter, Facebook, LinkedIn and blog posts are very cheap, and the ROI is phenomenal! Help forums are also HUGE to build your brand! I have had so many clients contact me to say thank you because an answer I posted on a help forum or a blog article I've written helped them with a similar question. YouTube, Vine, iGivit and other video options are also a great way to show the world all the stuff you have to offer!

□ STEP 8

Use video conferencing apps to “meet” your clients. One prospect I had been emailing back and forth with a bit was slightly hesitant to hire me — until we did a short Google Hangout. There really is nothing better than getting to actually chat face-to-face with people — even if it's remotely. With so many choices, and many of them free or very low cost — Skype, FaceTime, Google Hangout, Fuze, iVisit, Webex — it shouldn't be hard to find one (or more) that works for you and your clients.

□ STEP 9

Create your own network. I wouldn't be able to support my current group of varied clients without a strong network of colleagues — people that do what I do, but not exactly. For example, I'm not an expert in ecommerce, but Jim Savage is. I refer people to Dawn Brolin when they're looking for help with a Not for Profit. For franchise setup and training, my girl Christine Galli is the go-to. It works both ways as I also have colleagues referring clients to me with questions about best practices with QuickBooks Online or other mobile applications.

□ STEP 10

Form strategic alliances. Work with people outside your industry — quality service providers and products that you can use and feel comfortable recommending to your clients, and with which you can trade referrals. For instance, I have a business coach that I can refer clients to if I see they need help with focus and planning, and she refers clients that need help with their back office technology or processes. Become an expert in a software application and build a relationship with the developer; join an affiliate program, such as Avalara.com, Acctivate.com or Mavenlink.com.

□ STEP 11

Build a good website, and put a blog on it. You don't have to update it every day — once every week or so is fine. Ask people to contribute content to it — clients, vendors and colleagues — I guarantee almost everyone that you ask to write a 300-400 word piece will most likely gladly do so. Who turns down free advertising? I know I don't!

WORDS FROM COLLEAGUES

I want to close with a few quotes from colleagues on ways to look at and take on this process.

Peter Cullen recently wrote for the Intuit Accountant Blog and offered a great bit of advice on how his practice made the transition to online services:

“...we start out by communicating the value to our client of performing accounting services in the cloud. We educate the client on “the cloud” and exactly what the transition means...”

Christine Galli (the co-author of the original U.S. ProAdvisor Certification exam) gave me this nugget:

“Think of QuickBooks Online as a meeting place for your professional team. Don’t hold the information hostage from others that can help elevate your practice and your client’s business.”

My last bit of advice comes from colleague Jim Savage:

“The best way to get your practice online is to find someone who you respect and do the same thing they did.”



ABOUT STACY KILDAL

Stacy Kildal of Kildal Services LLC is the nation's foremost expert in QuickBooks Online. She has written the original training courses for the US, Singapore and Canadian versions of the product and works closely with Intuit's product developers. Stacy has also spent time in Australia doing hands on QuickBooks Online training with Australian bookkeepers and accountants. She has presented training courses for Joe Woodard's Scaling New Heights and Doug Sleeter's Sleeter Conference and Small Business Technology Road Show. Stacy was also named to CPA Practice Advisor's 2012 "most powerful women in accounting."

Stacy is an Advanced Quickbooks ProAdvisor, Certified Enterprise Solutions ProAdvisor, Certified Sleeter Group Consultant, Certified Quickbooks User and a nationally recognized member of the Intuit Trainer and Writer Network.

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