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Simple Steps to Success: How I Built My QuickBooks Practice Using the ProAdvisor Program

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I routinely hear questions from bookkeepers regarding the QuickBooks ProAdvisor Program. Is it really worth the cost? How important is getting certified? I've worked with QB for many years, how will this benefit me? I like to share how I was successfully able to build a practice as an outsourced bookkeeper using the ProAdvisor Program!

I began planning to open my own practice amidst record high unemployment in my state. The market was over-saturated with very qualified professionals all vying for a limited number of positions. What was a degreed Accountant to do to overcome this challenge? Then, it dawned on me! This was my chance to become my own boss and parlay my talents into a viable business.

The dilemma was how to make that happen...sooner, rather than later! It was a no-brainer that I would need to be proficient with QuickBooks to reach the small business market. After much thought and research, I concluded that my first step would be to join the QuickBooks ProAdvisor Program.

It was the best investment that I could have made! I have quickly added to my client base and grown my practice using non-traditional advertising methods. My membership was a key tool in preparing for success right from the start.

The central piece of the membership is the software. The membership bundle includes the 2012 edition of QuickBooks Accountant specially created for ProAdvisors, called QuickBooks Accountant Plus, which allows you to support your Pro and Premier clients. Membership also includes:

QuickBooks Online: QuickBooks Online is the web-based approach that enables full access to QuickBooks, anytime, anywhere.

QuickBooks Enterprise Accountant: Ideal for businesses with multiple users and locations that process a large number of transactions, or have inventory-intensive workflows.

QuickBooks for Mac (New this year): Support your Mac clients using the accounting product designed with the native look, feel and ease you expect from a Mac. If you have a Mac computer, it's a great way to also serve your clients using QuickBooks for Mac.

As a ProAdvisor, you get access to the latest enhancements with QuickBooks Accountant Plus before they are released to the public. No more waiting for the next year's release to enjoy user friendly updates! There have been some great new features added recently that make it easier than ever to get work done. Examples are the improved Enter Memorized Transaction window and the Transaction Detail tab of the History Pane (which was introduced in 2011), shown in the pictures below. The Accountant's Copy Transfer Service that allows you to easily exchange .qbx files with clients over the web is also an added benefit of the Accountant Plus edition.

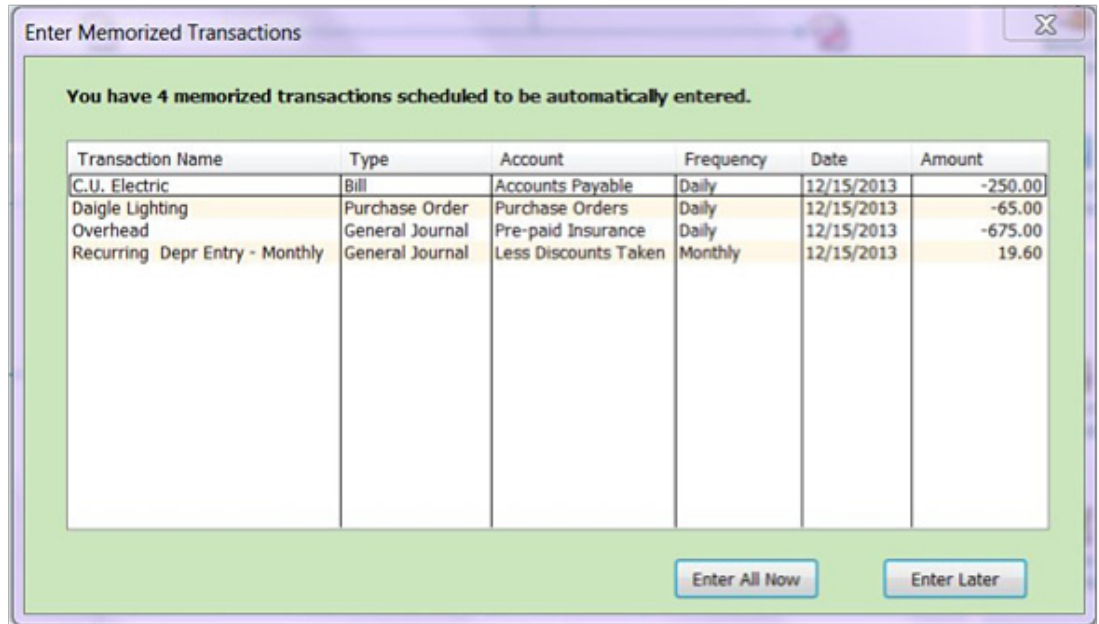


Figure 1. Improved Enter Memorized Transaction dialogue box. Available with Accountant's Plus bundle, included in the ProAdvisor Program.



Figure 2. Improved History Pane with Transaction Data. Available w/ PAP!

As long as you continue to be a member, you will receive the latest software release. I am always able to answer my clients' questions about the latest edition because I receive it free with my membership. My growing library of the different versions helps me to easily support clients that don't like to upgrade every year.

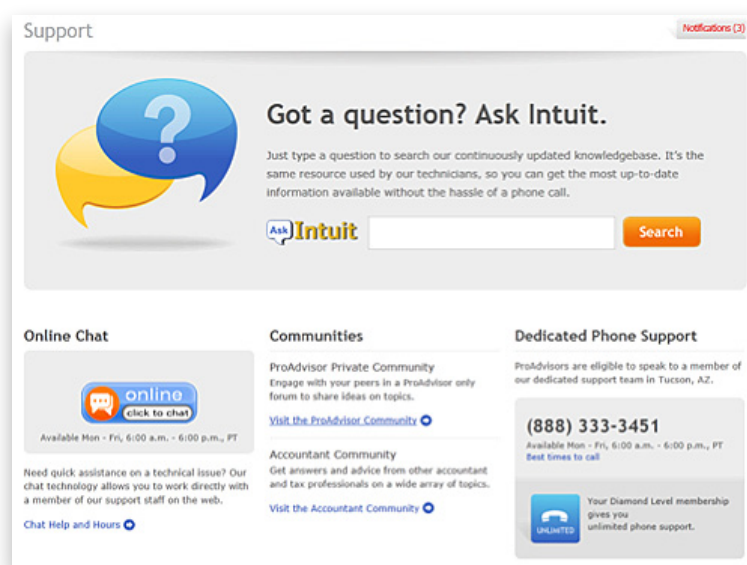
Members also gain free access to several QuickBooks connected services with the QuickBooks Care Plus Bundle. This includes Intuit Data Protect, to securely backup and store your QuickBooks data and other files; QuickBooks Connect, to access your customer data while on the go; and QuickBooks Email.

Another new offering included in membership is the Intuit Payment Solutions Bundle. ProAdvisors receive a one year subscription with no monthly or annual fees to Intuit Merchant Service, Intuit GoPayment, Intuit PaymentNetwork and Intuit Check Solutions for QuickBooks! Transactions fees still apply.

It is valuable to have first-hand experience with these services because growing your business depends on you being the expert in all of the related Intuit products that clients will want to know about. You can confidently recommend these services because you are using them yourself. These services alone are worth over \$400 a year.

ProAdvisors also enjoy expanded support options for the software. There is U.S. based priority technical support available which provides quick access to highly trained experts through a dedicated hotline. You can also get online access to the same technical resources that the Intuit support techs utilize. This has made it simple to always get the answers I need, when I need them.

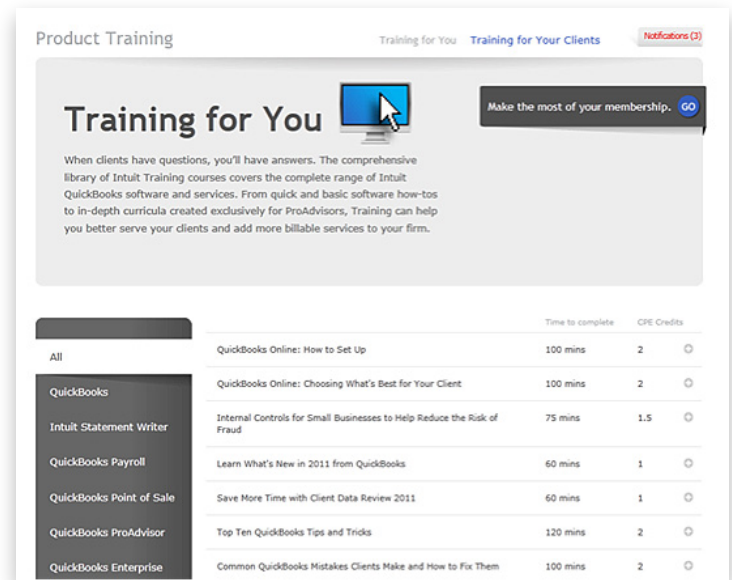
Help is also available on the Intuit community forum. This forum is a good resource for learning how other ProAdvisors and professionals handle the same situations I face. ProAdvisors have a members only area to discuss issues that arise. I was also able to research the site to learn what common issues face so that I would be well prepared to solve them. I also lend a hand in answering questions when time permits.



By staying involved in the community forum, I found another great resource for ProAdvisors-the Successful QuickBooks Consultants group on LinkedIn, founded by Advanced ProAdvisor and Member of Intuit's National Trainer Network, Michelle Long, CPA. This is one of the largest groups on LinkedIn and very active with accounting professionals who share their knowledge about QuickBooks as well as best business practices for being successful. Networking with peers and staying up to date on the latest issues has increased my ability to attract and retain clients.

The next step of my plan was to strengthen my QuickBooks skills. A lot of business owners have suffered the consequences of someone claiming to “know QuickBooks”! It is important to master the software to avoid major problems. Obtaining the certifications demonstrates your level of commitment to product knowledge and will win you clients.

The learning tools are designed to take between 16-20 hours to complete. However, the more you already know about QuickBooks the less time it will take. Experienced users may be able to pass without the training. However, there is also value to the course for those who have been working with the software for a long time. The self-paced format saves time by allowing you to easily navigate to what you want to brush up on. I also took advantage of the Enterprise and Point of Sale certifications. Prospects inquire about these products and it only makes sense to be fully prepared to support their needs.



ProAdvisors are eligible to take the Advanced QuickBooks exam after obtaining the certification in three product years. The training materials and exam cover more in-depth issues such as advanced installation and setup, a look at different job costing accounting methods using QuickBooks, running payroll and advanced troubleshooting to aid in coming to your clients’ rescue. I recommend that all ProAdvisors who are eligible review the training materials, even if not planning on taking the exam; I am sure you will find tips and tricks to improve your skill set.

Another boost for business that comes with certification is being listed on the Find-A-ProAdvisor (FAP) website. High ranking on the site can be achieved by completing your profile, uploading a picture, obtaining all available certifications and having clients write a review. The site is also optimized for internet search engines; I am at the top of a Google search for the popular term “QuickBooks help” for my local area because of my FAP profile. This benefit alone has been worth the investment in the program for me.






Figure 3. An added benefit of certification-good search results

Finally, I used the informative practice building tips in the Practice Resource section of the ProAdvisor member website. There are sections dedicated to helping set up, market, and expand your QuickBooks practice. These areas contain checklists, templates, articles and other information to ensure success.

The QuickBooks ProAdvisor Program and member website have recently been redesigned in order to better serve our needs. There are different levels of membership that reward those who take the time to get and stay certified. I love the new design that makes it much easier to navigate so that I do not miss out on any of the resources provided. I can choose a goal and then be shown the resources to help me accomplish that goal. There is information that will help you whether you are just setting up shop or have been in business for a while.







The ProAdvisor member website also provides free training materials that you can use to teach QuickBooks to your clients. You can use the materials provided or design your own training programs and seminars based on them. Seminars and training opportunities are great ways to take your practice to new heights.

Key Content at a Glance

 Certifications	 Product Training	 Practice Resources
<p><small>CERTIFICATIONS TO CONSIDER</small></p> <p>Take Enterprise or Point of Sale Certification to expand your knowledge and enhance your profile.</p> <p>Pass the QuickBooks Point of Sale v10 Certification and receive a copy of Point of Sale Pro v10.*</p> <p>View All</p> <p>Visit Certification Course Locker</p> <p><small>* Limit one per customer. Does not apply for those that have already received a copy after passing Point of Sale Certification v8.</small></p>	<p><small>RECOMMENDED TRAINING</small></p> <p>Common QuickBooks Mistakes Clients Make and How to Fix Them</p> <p>Intuit Online Payroll for Accounting Professionals</p> <p>National Association of Tax Professionals Summer Courses</p> <p>View All</p>	<p><small>PRACTICE RESOURCES MODULES</small></p> <p>Expanding Your Practice</p> <p>Marketing 101: Learn the Basics</p> <p>Online Marketing</p> <p>Trade Shows and Local Events</p> <p>Client Mix</p> <p>View All</p>

Get Results with Membership Goals

We know accounting professionals join the ProAdvisor Program for many different reasons. That's why we've created an easy path to get the program benefits that are most important to you. Choose the goal that most closely matches your reason for joining and we'll recommend the best way to achieve it.









Choose a Goal

Figure 4. Redesigned ProAdvisor Program member website.


Practice Resources Notifications (3)

Back to Business




The ProAdvisor Practice Management resources are for professionals who are ready to add more clients, expand their list of services, and gain greater control over their business.

Make the most of your membership. [GO](#)




Download ProAdvisor certification logos to use on your marketing material. [Learn more.](#)

Expanding Your Practice




MARKETING & GROWTH

Marketing 101:
Learn the Basics




MARKETING & GROWTH

Online Marketing




MARKETING & GROWTH

Trade Shows and Local Events




MARKETING & GROWTH

Client Mix




CLIENT SERVICES

Client Onboarding




CLIENT SERVICES

Setting Up Your Practice




BUSINESS ADMINISTRATION

HR/Employee Management



BUSINESS ADMINISTRATION

QuickBooks 3rd party integration solutions



PRODUCTS TECHNOLOGY

Figure 5. Practice Resource section of redesigned member website.

Experts suggest that there is an increase in business start-ups during hard economic times, many for reasons similar to mine. In order to be prosperous, steps must be taken to position your business for success. In a few short years, I was able to leverage the ProAdvisor Program benefits to do exactly that. I would not be where I am today without investing in the program and taking full advantage of all the benefits provided. I encourage others to do the same. To learn more about the QuickBooks ProAdvisor Program visit www.proadvisor.intuit.com.

To learn more about the ProAdvisor Program, call **877-300-7345**.