



Apps and automation for your firm

Michelle L. Long, CPA, MBA

OWN
THE
FUTURE

A woman with blonde hair in a ponytail, wearing a green jacket with a white fur collar, is looking towards the right. In the foreground, the back of another person's head with long blonde hair is visible. The background is a blurred crowd of people in an outdoor setting with green foliage.

Take a minute
to connect with
your neighbor

#QBConnect | WiFi: QBConnect

CPE Process

In order to receive CPE credit

- Be sure to sign in or scan your badge for this session
- You must stay in the session for the duration of the training
- This session is eligible for **1 hour of CPE**
- CPE certificates are emailed directly to you within 4 weeks of the conference date to the same email address you used to register

About today's speaker



Michelle L. Long, CPA, MBA

Long for Success, LLC

International speaker – Intuit Trainer/Writer
Network since 2007

Co-Host – <http://QBPowrHour.com>

Author – 5 Books including: QuickBooks Practice Sets, How to Start a Home-Based Bookkeeping Business, Successful QuickBooks Consulting, co-author QuickBooks and QuickBooks Online Advanced Certifications and more

Agenda

Recognize the benefits to standardizing and automating your firm

Discover various apps to help transform workflows (i.e. APPify the Processes™) for your clients and for your firm

Related sessions



Tech Stack Implementation – Erin Vukelich, on Wed 10:30 and 1:00

Learn to review, test, and onboard your clients onto your chosen tech stack applications. Focusing on client impact, we will review techniques to begin the implementation process and duplicate it in the future.



Becoming an Apps Master: Connecting Apps to QuickBooks Online Database, for Your Clients – Liz Scott on Wed 2:30 and Thurs 9:00

Gain insight into the design and configuration of the QuickBooks Online database. Learn safeguards and limitations of the database as well as basic tables structure knowledge useful for connecting 3rd party apps.

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Benefits to Standardizing and Automating your Firm

Benefits of standardization

Efficiency

Consistency of client experience

Scalability

Capitalization of firm knowledge

Streamlined transition of roles and responsibilities

Ability to automate



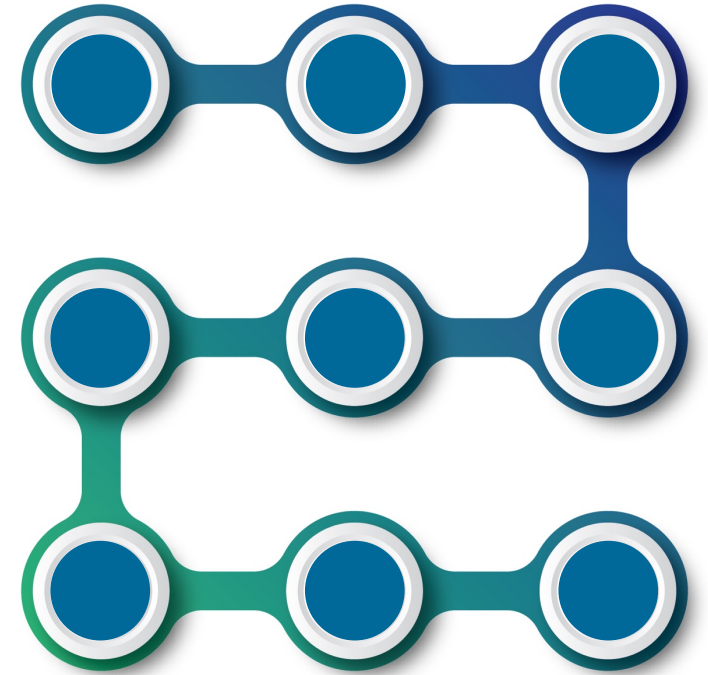
Standardized firm

Focuses on a single industry and business model

Offers a fixed range of services with deep and effective levels of expertise

More quickly on-boards clients AND team members

Variation is the enemy!



Clients of a standardized firm

Fit your standardization

Coachable

Value you/your firm beyond accounting /
bookkeeping / tax prep

Willing to adopt technology and processes
you recommend

Focus on the right clients!



Steps to transform your practice

Determine your specialization

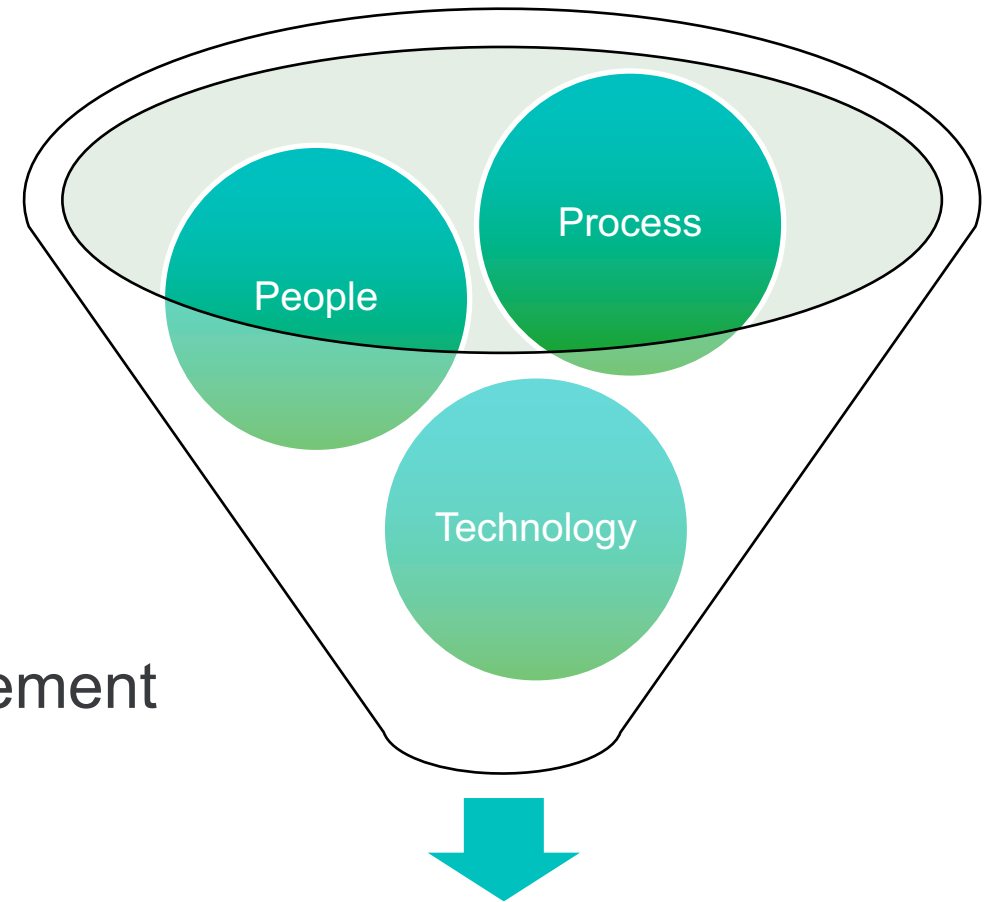
Create a team

Map, document and automate the processes

Train to processes and over-manage adoption

Improve processes and modify documentation

Aero Workflow and Karbon are practice management apps with many processes mapped out



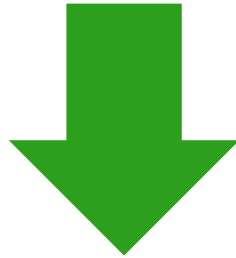
Standardized Service

Benefits of Automation – for Clients

Timely information

Collaboration

Connection of front end to back end



**Significant, game changing
reductions in data entry**

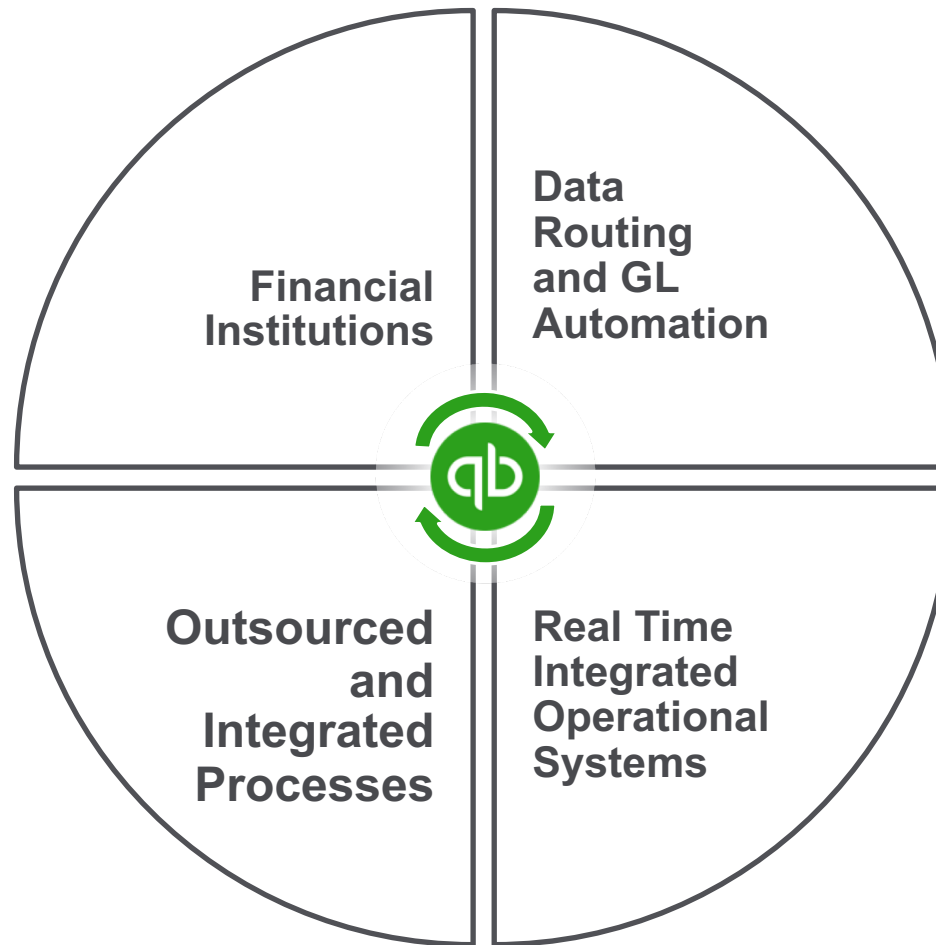


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APPify the Processes™ for your Client's Data

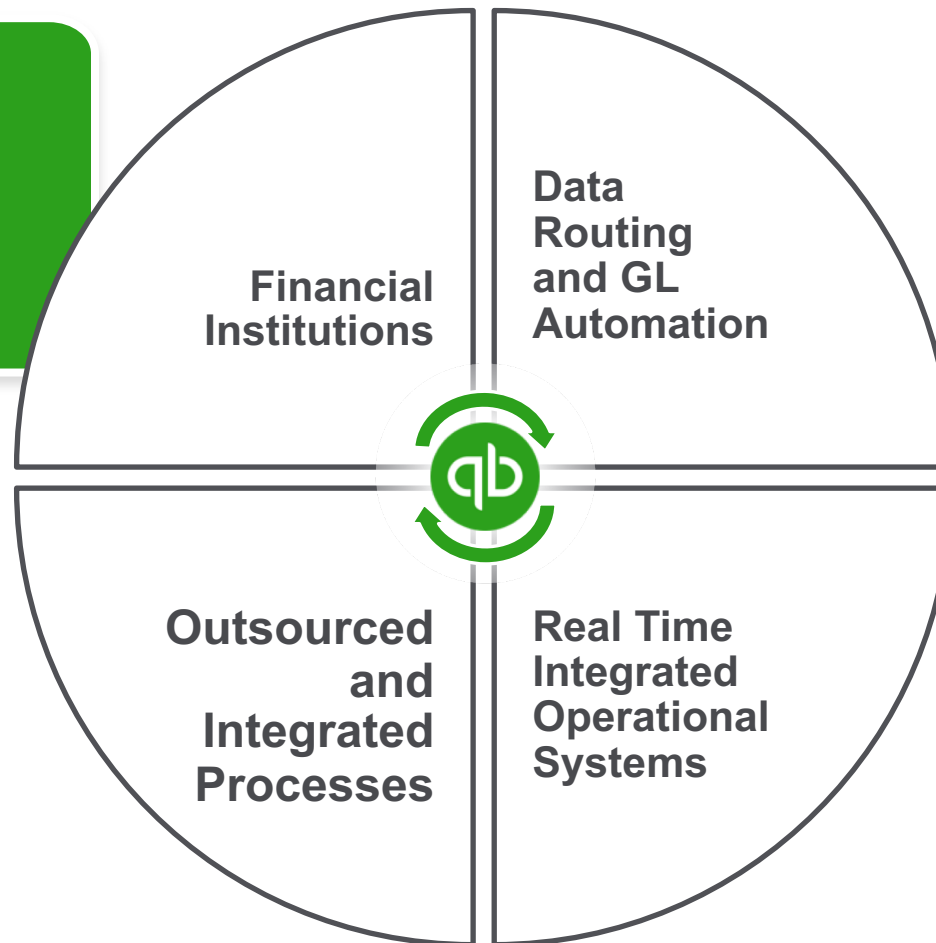
APPify the Processes™ for client data

Scenario: Accounting / bookkeeping services



APPify the Processes™ for client data

Bank Feeds to GL
Credit Cards to GL
Lending Companies
to/from GL



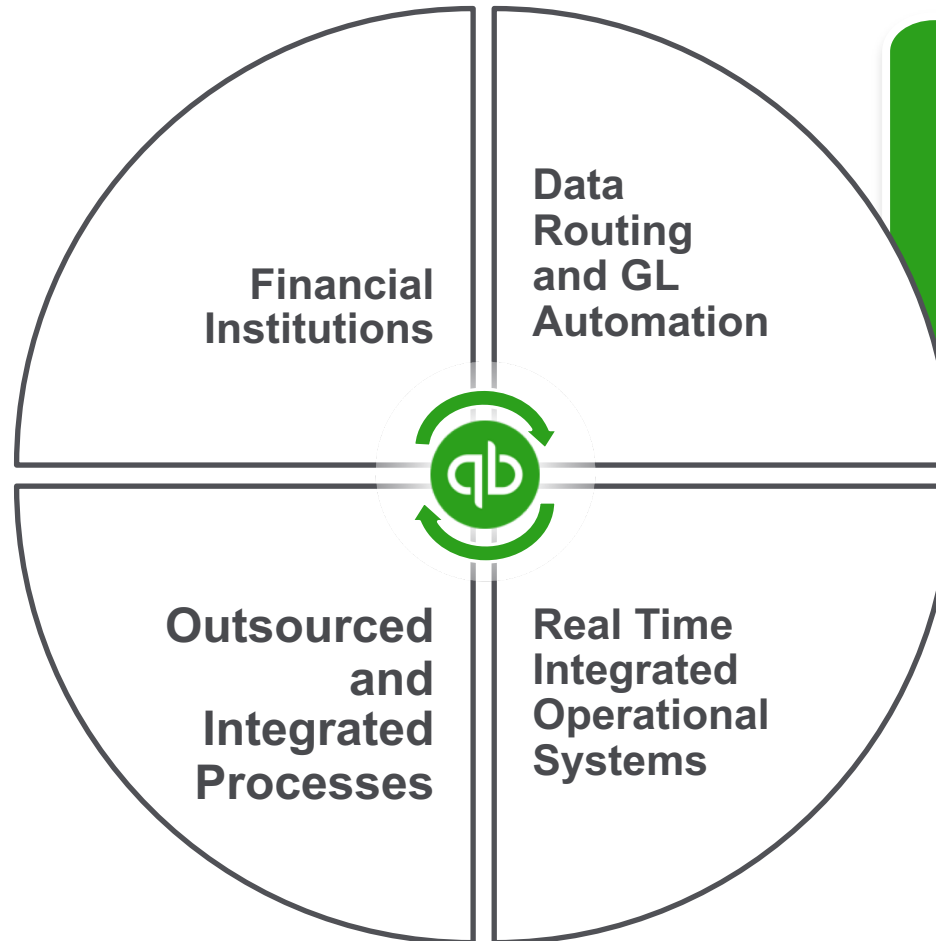
moneythumb.
Boost your Productivity



Transaction
Pro Importer

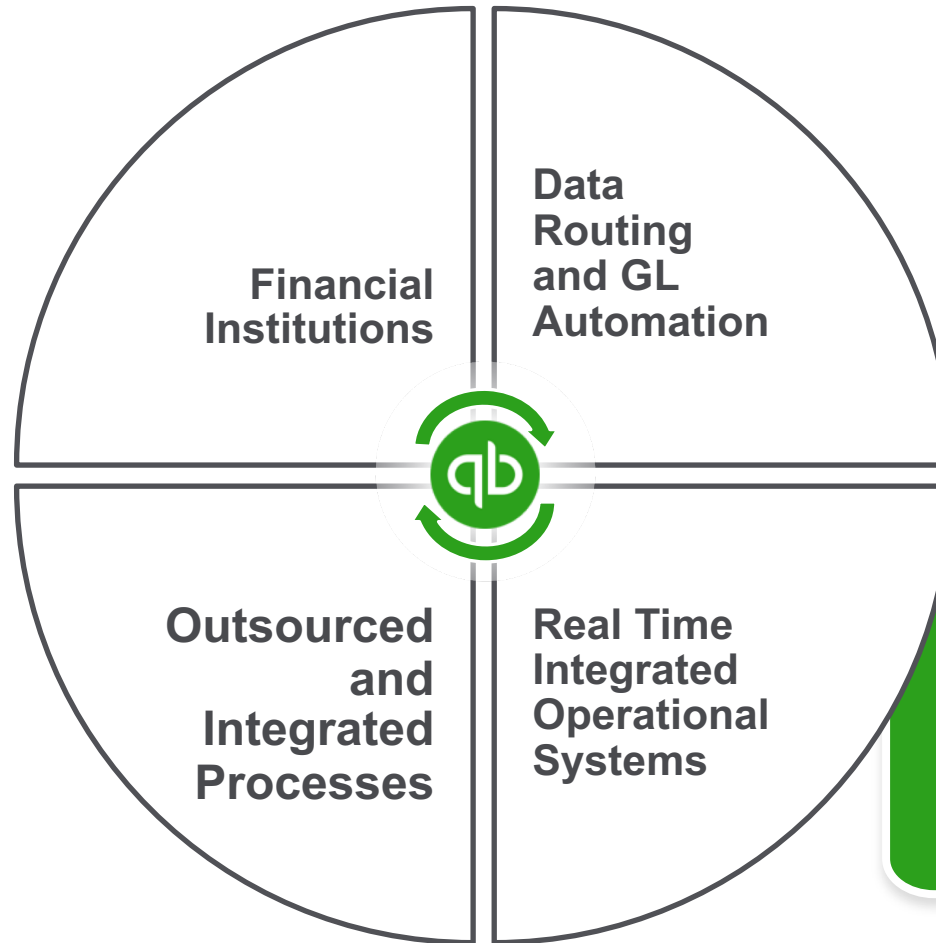


APPify the Processes™ for client data



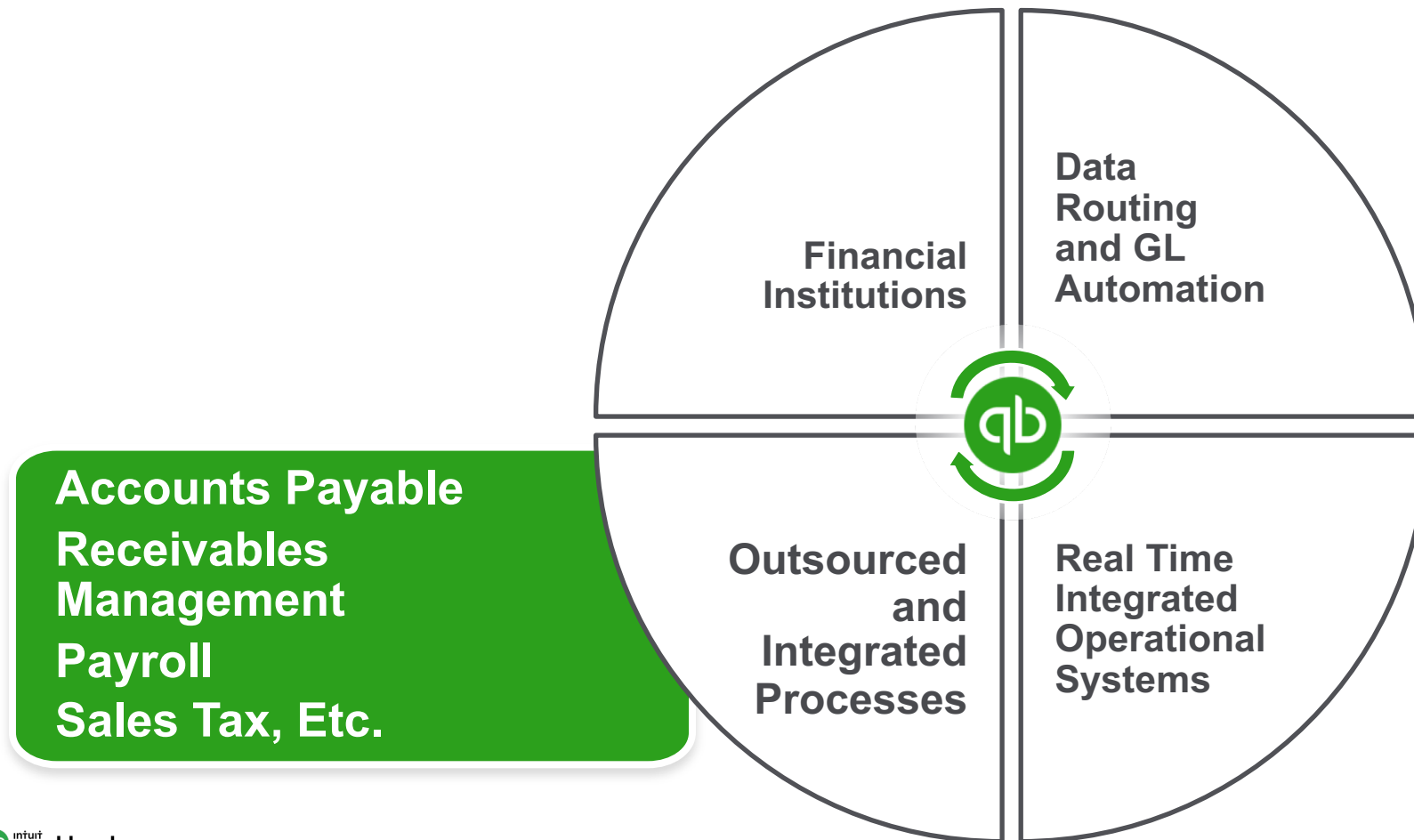
Document Fetching
Expense Reporting
Time Management

APPify the Processes™ for client data



Point of Sale
Warehouse
Field Services
E-Commerce, Etc.

APPify the Processes™ for client data





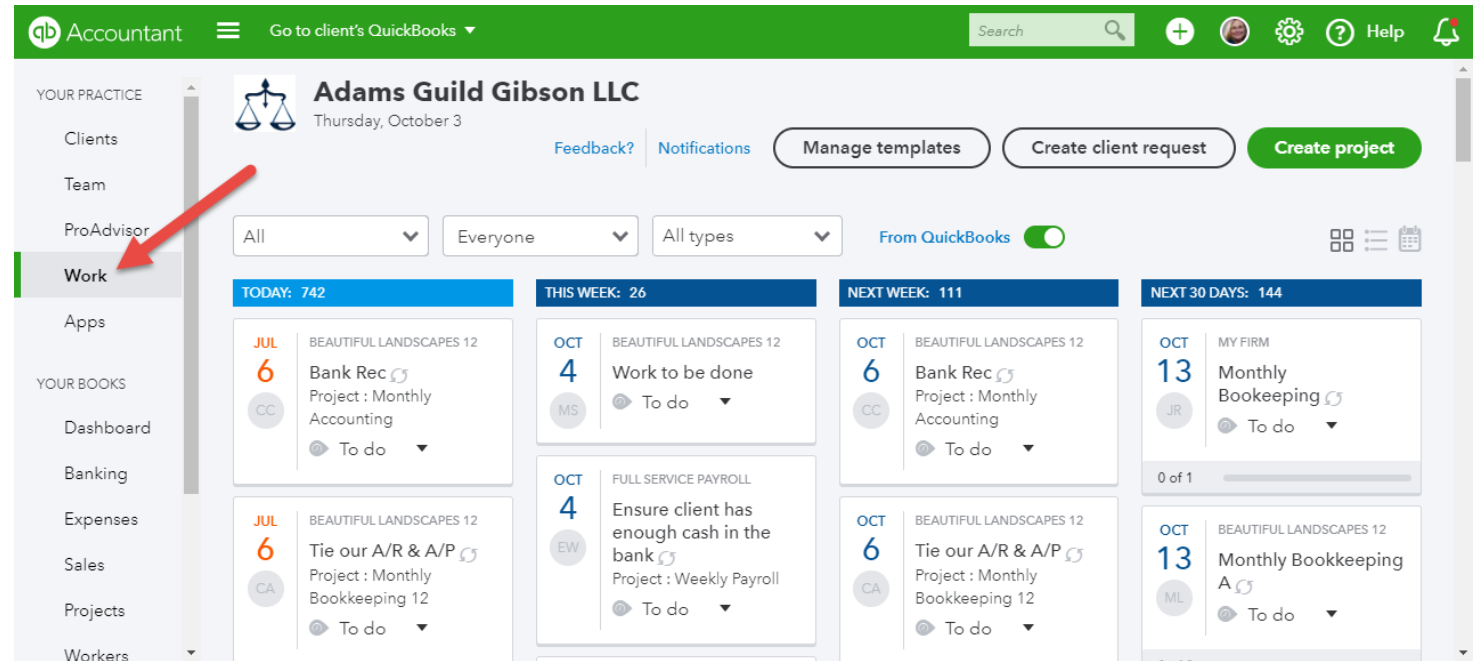
APPify the Processes™ for You

APPify the Processes™ – Workflow and task management

Due dates

Task assignments

Procedures and checklists



APPify the Processes™ for you

Creating proposals

Customizing engagement letters

Onboarding clients

Client communication

CRM for client referrals and leads



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Questions?

Thanks!

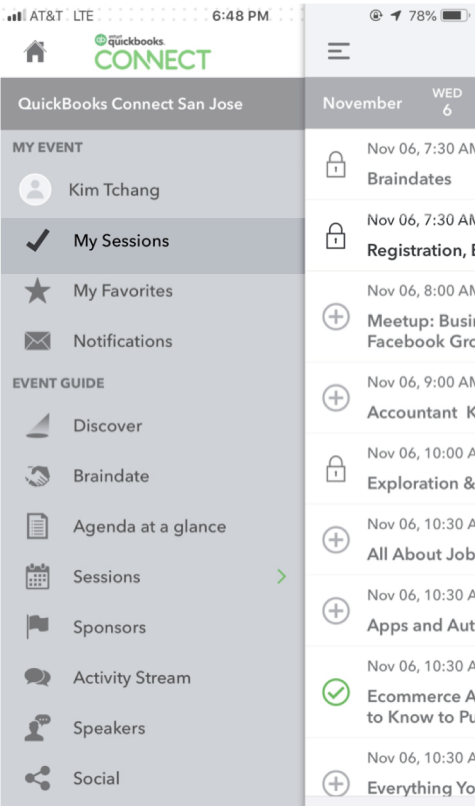
Connect / Follow me – links on my website: <http://longforsuccess.com>



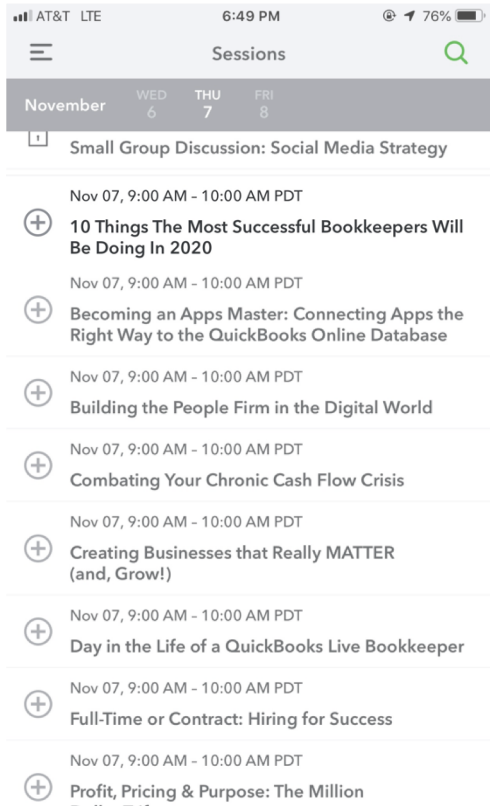
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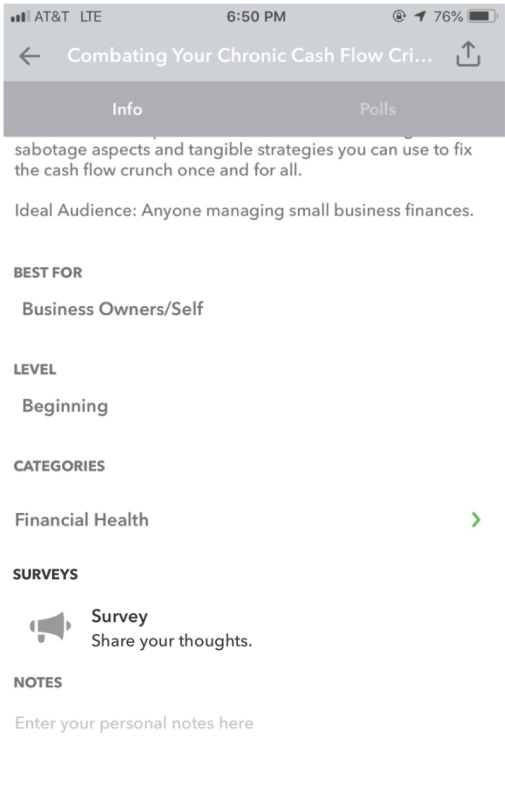
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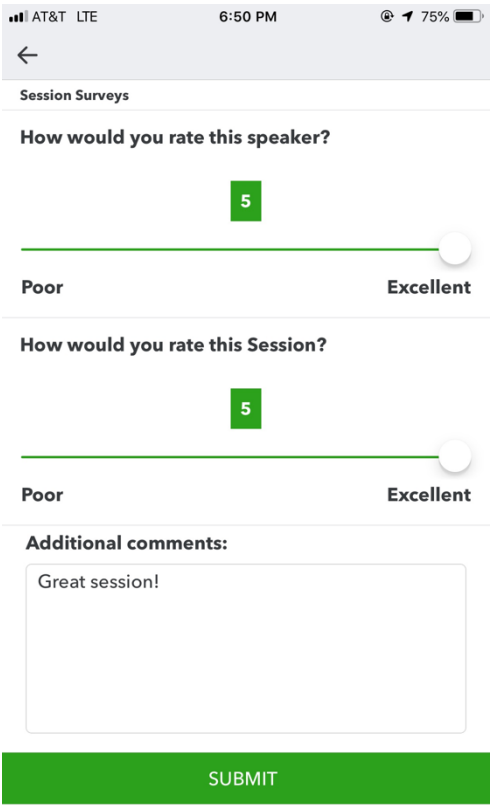
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- 1. Find the session on the agenda
- 2. Select + for more information
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<https://quickbooksconnect.com/agenda/>



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Accountant Day

November 7

November 8

Print Agenda

Get new insights from experts in business growth, organizational culture, financial health, technology and life skills. Book a Braindate with peers and expert consultant for one-on-one learning. Unwind in the evening with our legendary celebration.

Search for sessions

Filters:

Business Growth

Life & Business Skills

Organizational Culture

Technology Training

Advisory

Financial Health

Expand all +

7:30-9:00 am

Registration, Breakfast & Exploration

7:30-10:30 am

Braindates

New this year, you can use Braindates to book time with fellow attendees, expert consultants and the QuickBooks support team. [Learn more.](#)

Best for: All Audiences

CPE Hours: not eligible

8:00-8:30 am

Yoga

8:00-8:45 am

Breakout Sessions

Small Business Meetup: Relationship Marketing and the Power of Human Connection

Small Group Discussion: Social Media Strategy

Small Group Discussion: Showing up - Why What You Wear Matters

Small Group Discussion: Build Your Dream Bookkeeping firm



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