



Bundles services are the bomb!

Debra Kilsheimer



A photograph of two young women with blonde hair, one in profile and the other seen from behind, engaged in conversation outdoors. The background is a soft-focus green, suggesting foliage. The text "Take a minute to connect with your neighbor" is overlaid in white on the right side of the image.

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

# Today's speaker



Debra Kilsheimer  
Behind the Scenes  
[@debbiekilz](#)

# Agenda

It's a new world out there

What clients want

What do WE want for our practices

What are bundled services

Bundles service option

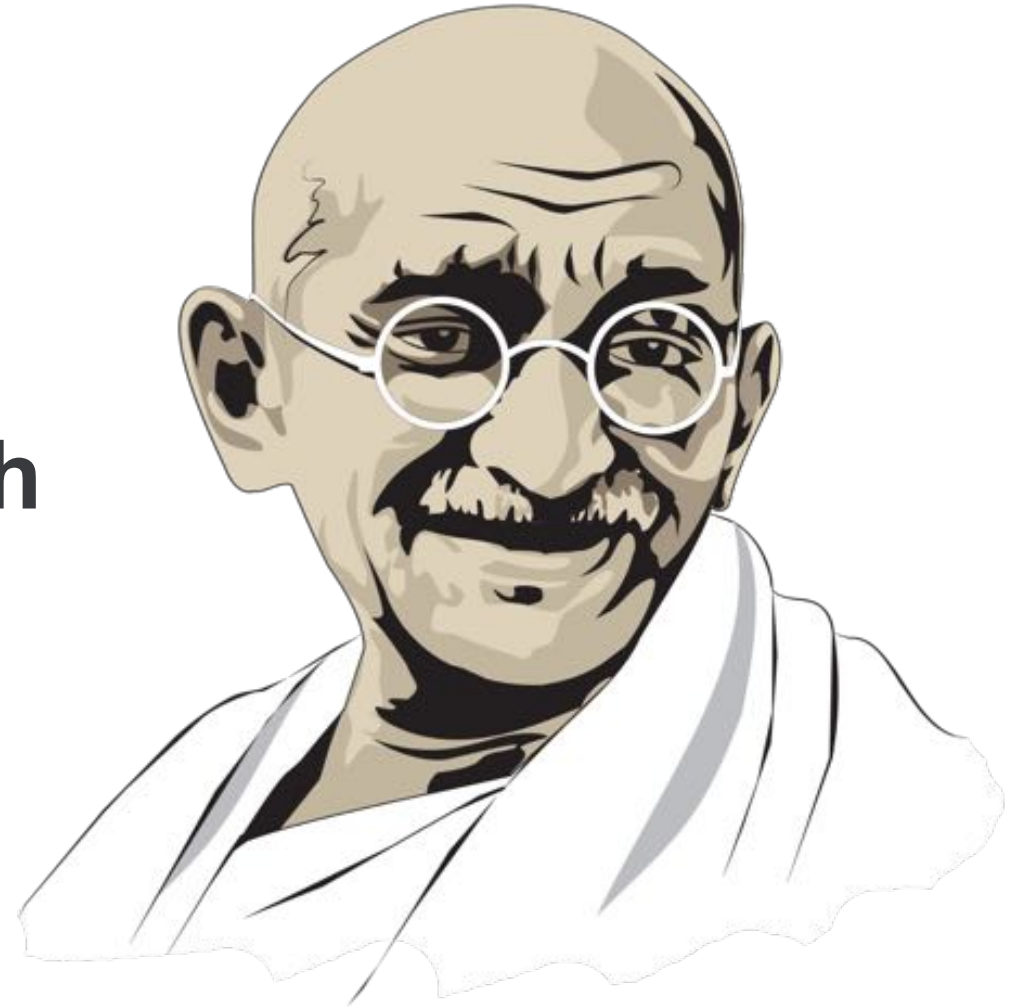
Questions





**Be the change that you wish  
to see in the world.”**

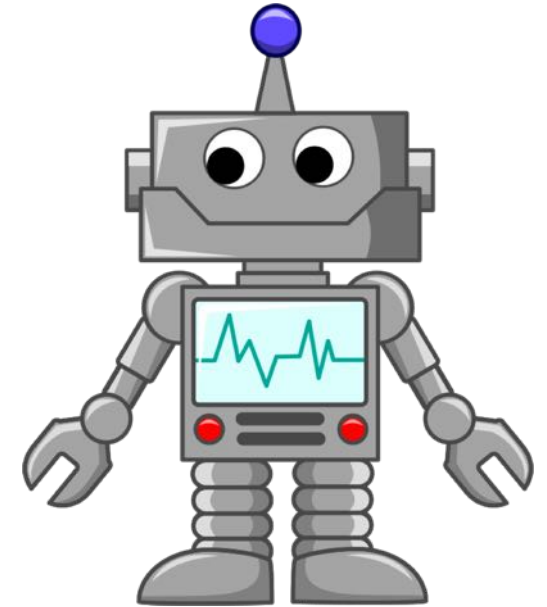
- Mahatma Gandhi



# Disruptors



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# What clients want

## Business planning

Understand cost of doing business

20 year business plan

Develop scalability

Streamline operations

## Coach/consult/smarts/common sense

Less time on mechanics – more time on strategy

## Availability

Knowledge of what's “out there”





# Our own practice challenges

Staffing

Capacity

Services

Business model

Workflow



# Traditional vs New firms of today

**Compliance  
driven**



**Lead with advisory  
services**

**Advisory workflow**

**Bundled services**

# Updating your business model

## From: Traditional billing

Leads with compliance

Annual tax prep transaction

Invoice by time or form, collect AR

Based on hours and inputs

Capacity constrained by staff

## To: Bundled services

Leads with what clients value

Monthly/quarterly advisory meetings

Bundled services with high ROI

Based on value delivered

Creates scalable capacity

# Multi-service firm bundles

For firms offering tax and accounting services

## Basic

Onboard & Training  
Annual Tax Planning Meetings  
QuickBooks Online  
Subscription  
Entity Review  
Retirement Plan Review  
Business Owner & Tax  
Preparation  
Estimated Tax Vouchers

## Advanced

### Everything in Basic Plus:

Quarterly Performance Review  
Advanced Tax Strategies  
Business Goal Tracking  
Electronic document Storage  
Staff Accounting Training  
Sales Tax Return Filing  
Employee Time Tracking using T-Sheets  
Payroll Tax Return Filing

## Full-service advisory

### Everything in Advanced Plus:

Monthly Performance Review  
Controller Services  
Bank & Credit Card Reconciliations  
Month End Close  
Cash Management Advisory  
Growth Advisory  
Accounts Payable  
Payroll Processing  
Custom Reporting

# Bookkeeping / accounting bundles

For firms bookkeeping and accounting services

## Basic

- Onboard & Training
- QuickBooks Support
- QuickBooks Online Subscription
- Year End Tax-Ready Books
- Work with Tax Preparer

## Advanced

### Everything in Basic Plus:

- Quarterly Performance Review
- Business Goal Tracking
- Electronic Document Storage
- Staff Accounting Training
- Sales Tax Return Filing
- Employee Time Tracking using T-Sheets
- Payroll Tax Return Filing

## Full-service advisory

### Everything in Advanced Plus:

- Monthly Performance Review
- Controller Services
- Bank & Credit Card Reconciliations
- Month End Close
- Cash Management Advisory
- Growth Advisory
- Accounts Payable
- Payroll Processing
- Custom Reporting

# Migrating annual clients to monthly

Bundled Services Pricing Template	Prior Year Fees	Basic	Advanced
Business Bundle Starting At	\$2,598	\$3,248	\$3,897
Price Strategy, % Increase in Fees		25%	50%
Add: QuickBooks Online Plus Subscription Cost	\$299	\$360	\$360
Add: QuickBooks Online Payroll Subscription Cost	0		
Add: Productivity Apps	0		
Annual Bundle Total	\$2,897	\$3,608	\$4,257
Quarterly		\$902	\$1,064
Monthly		\$301	\$355



Clients pay for results.  
You determine your  
business model and  
how to deliver value.





**As we look ahead into the next century, leaders will be those who empower others.”**

— Bill Gates





Please take time to rate  
this session

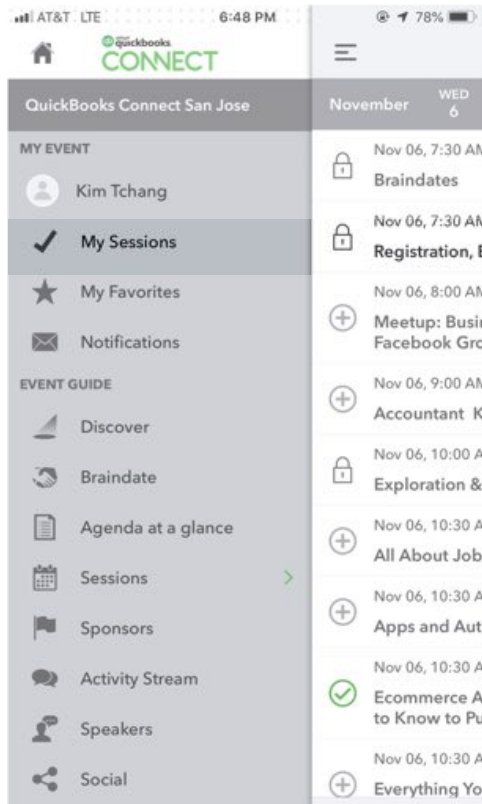


# Questions?

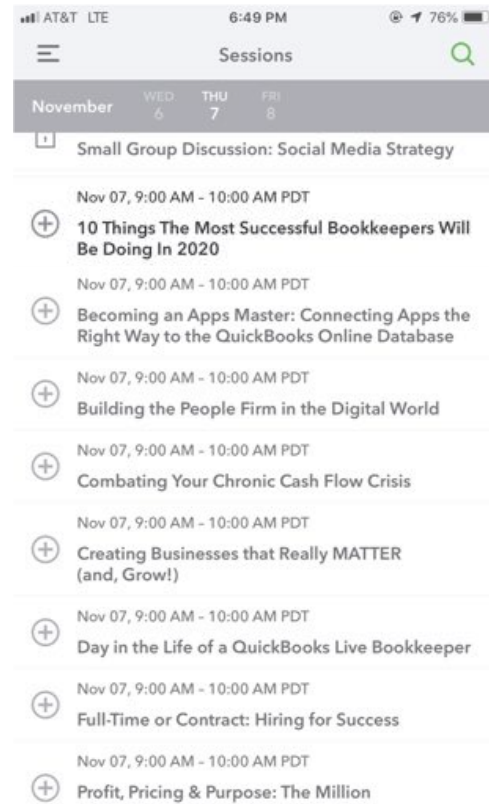
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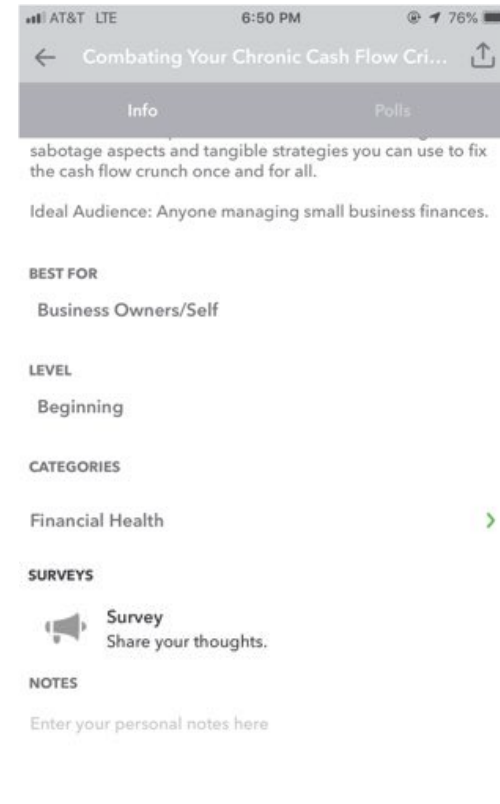
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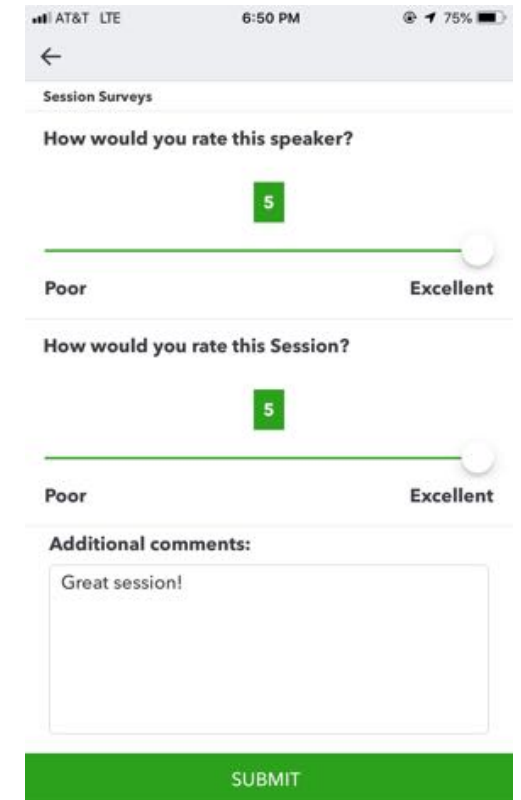
## 2. Select Session Title



## 3. Select Survey



## 4. Add Ratings



# Material Download

1. Find the session on the agenda
2. Select + for more information
3. Download PDF of slides and/or supplemental material

<https://quickbooksconnect.com/agenda/>

The screenshot shows the QuickBooks Connect agenda page for November 7. The header includes the QuickBooks Connect logo, navigation links (Why Attend, Agenda, Speakers, Pricing, Sponsors, Travel, FAQ), and a 'Register now' button. Below the header, there are tabs for November 6 (Accountant Day), November 7 (selected), and November 8. A 'Print Agenda' link is also present. The main content area features a search bar labeled 'Search for sessions' and a row of filters: Business Growth, Life & Business Skills, Organizational Culture, Technology Training, Advisory, and Financial Health, with an 'Expand all +' link. The agenda list for November 7 includes: 7:30-7:00 am (empty), 7:30-10:30 am (Registration, Breakfast & Exploration), 8:00-8:30 am (Braindates, with a description and 'Learn more' link), 8:00-8:45 am (Yoga), and a section for Breakout Sessions starting at 8:00-8:45 am, which includes Small Business Meetup, Small Group Discussions on Social Media Strategy, Showing up, and Build Your Dream Bookkeeping firm. Each session has a '+' icon for more information.





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