



# Growing with QuickBooks Live Bookkeeping

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Carrie Hammond & Claire Burkard

#QBConnect | WiFi: QBConnect



# Speakers



**Ariege Misherghi**  
Accountant Leader,  
Intuit QuickBooks



**Ted Callahan**  
Offering Leader,  
QuickBooks Live



**Carrie Hammond**  
Sr. Product Marketing Mgr.,  
QuickBooks Live



**Claire Burkard**  
Bookkeeper Manager  
QuickBooks Live

# Agenda

What is QuickBooks Live?

How does QuickBooks Live help me, my practice, my firm?

What is it like to be a QuickBooks Live Bookkeeper?

Q & A

A collage of various small business scenes. The top row shows a man sitting on a bench, a woman reading a tablet, a man and woman talking, a man at a laptop with a chalkboard, a man in a purple shirt, and a woman talking to a man. The middle row features a man in a suit by a sign and a man in a blue shirt. The bottom row includes a man with an '@' logo, a man working at a desk, a man and woman on a sofa, a woman at a desk, a man at a desk, and a woman at a desk. The central text is overlaid on a green background.

**SMALL BUSINESS  
WANT TO FOCUS ON THEIR BUSINESS,  
NOT THEIR BOOKS**

# Why QuickBooks Live

Our customers tell us they need assistance managing their books.

**7 out of 10** of all small business are **not connected** to an accounting professional for ongoing accounting support

**6 out of 10** are **already connected** to an accounting professional on QuickBooks Online

**1 out of 4** of new customers who abandon or cancel cite “**Did not know how to get started**” as top reason

*Small Businesses don't feel confident they're doing the right thing,  
nor do they have the time to dedicate to do it well*

While many small businesses using **QuickBooks Online** are connected to ProAdvisors through our **Find-a-ProAdvisor** platform, our research shows that:

**40%** of small businesses don't work with a ProAdvisor or accounting professional

**89%** of small businesses say they're more successful when working with an accounting professional

*QuickBooks Live aims to bridge that gap by providing small businesses with the bookkeeping expertise they need to thrive*

# What is included with QuickBooks Live

Customize their setup

Categorize and reconcile transactions

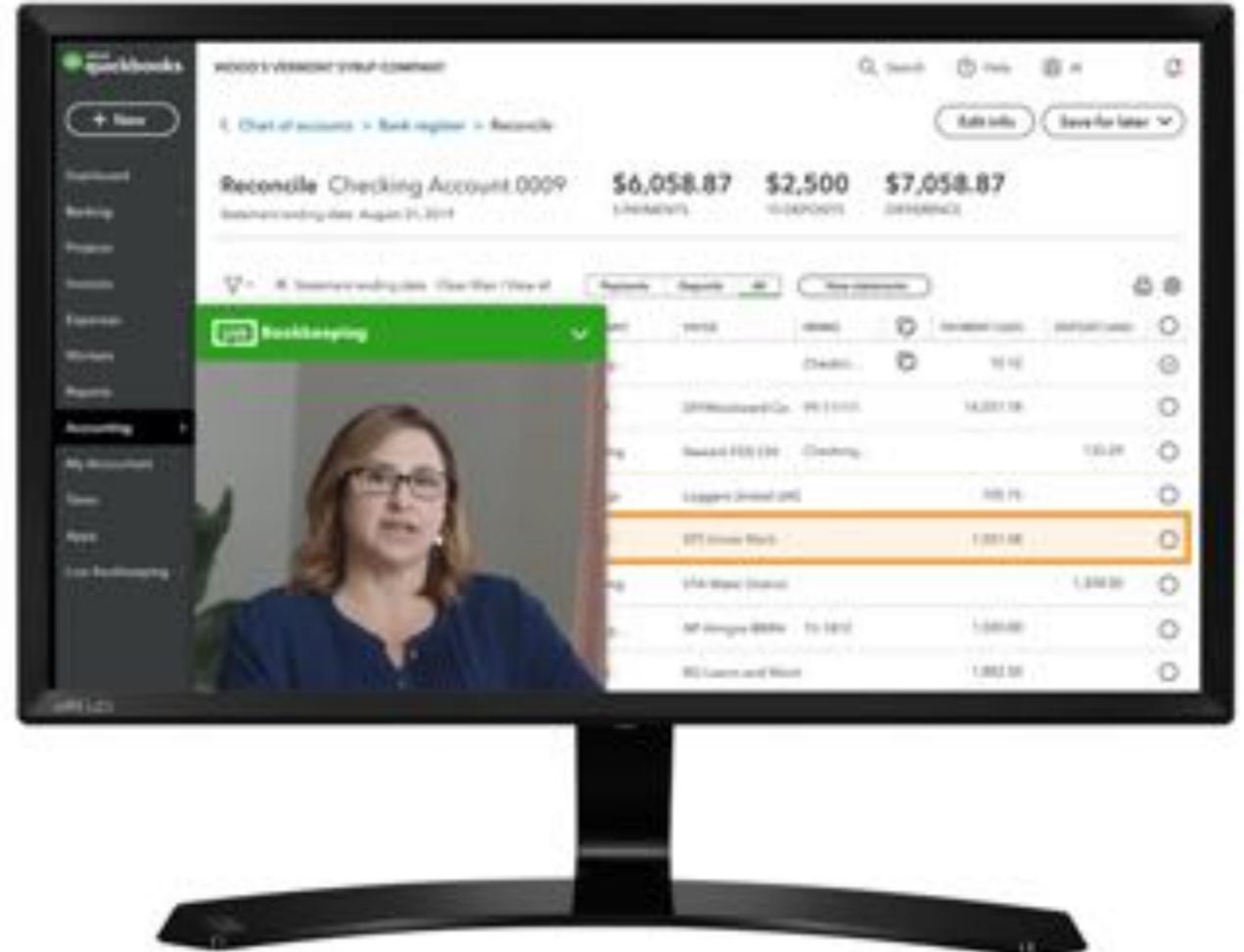
On demand assistance

Help ensure their books are accurate at month end

Teach workflows

Personalized monthly reports

Be ready for tax time



Freedom

**FREEDOM TO  
FOCUS ON THEIR  
BUSINESS**



**LaRayia**  
Lunch On Me



Confidence

**CONFIDENCE THAT  
THEIR BOOKS ARE  
ACCURATE**

**Steve Gold**  
ElectricOn



**QUICKBOOKS LIVE HELPS SMALL  
BUSINESSES MAKE SMART  
FINANCIAL DECISIONS**





How does QuickBooks Live help me,  
my practice, my firm?



# Working as a QuickBooks Live Bookkeeper

**Make extra money**

**Work from home**

**Set your own schedule**



# Growing your practice as a QuickBooks Live Bookkeeper

Expand your network

Develop your skills and industry expertise

Learn new technology



# How QuickBooks Live can help larger firms

**Free up capacity for advisory services**

**Hire ahead of demand**

**Expose early career talent to training and broader industry knowledge**





# What is it like to be a QuickBooks Live Bookkeeper?



# Qualifications

## **ALL** of the following:

- Active QuickBooks Online ProAdvisor certification
- 1 or more years experience working with QuickBooks Online
- Proficient with technology
- Strong customer service skills
- Ability to work independently in a fast-paced environment

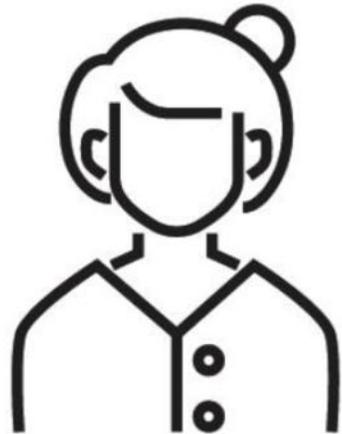
## **and ONE** of the following:

- Active CPA credential (Certified Public Accountant)
- Active CPB credential (Certified Public Bookkeeper)
- Bachelor's degree
- 3+ years managing the books for a Small Business



# Identifying top talent at all levels

## Qualifications



**Associate  
Bookkeeper**



**Senior  
Associate  
Bookkeeper**



**Expert  
Bookkeeper**



**Senior Expert  
Bookkeeper**

# Growing with QuickBooks Live



## Expert

Serve our customers and grow your expertise



## Lead

Support our experts and develop your leadership skills

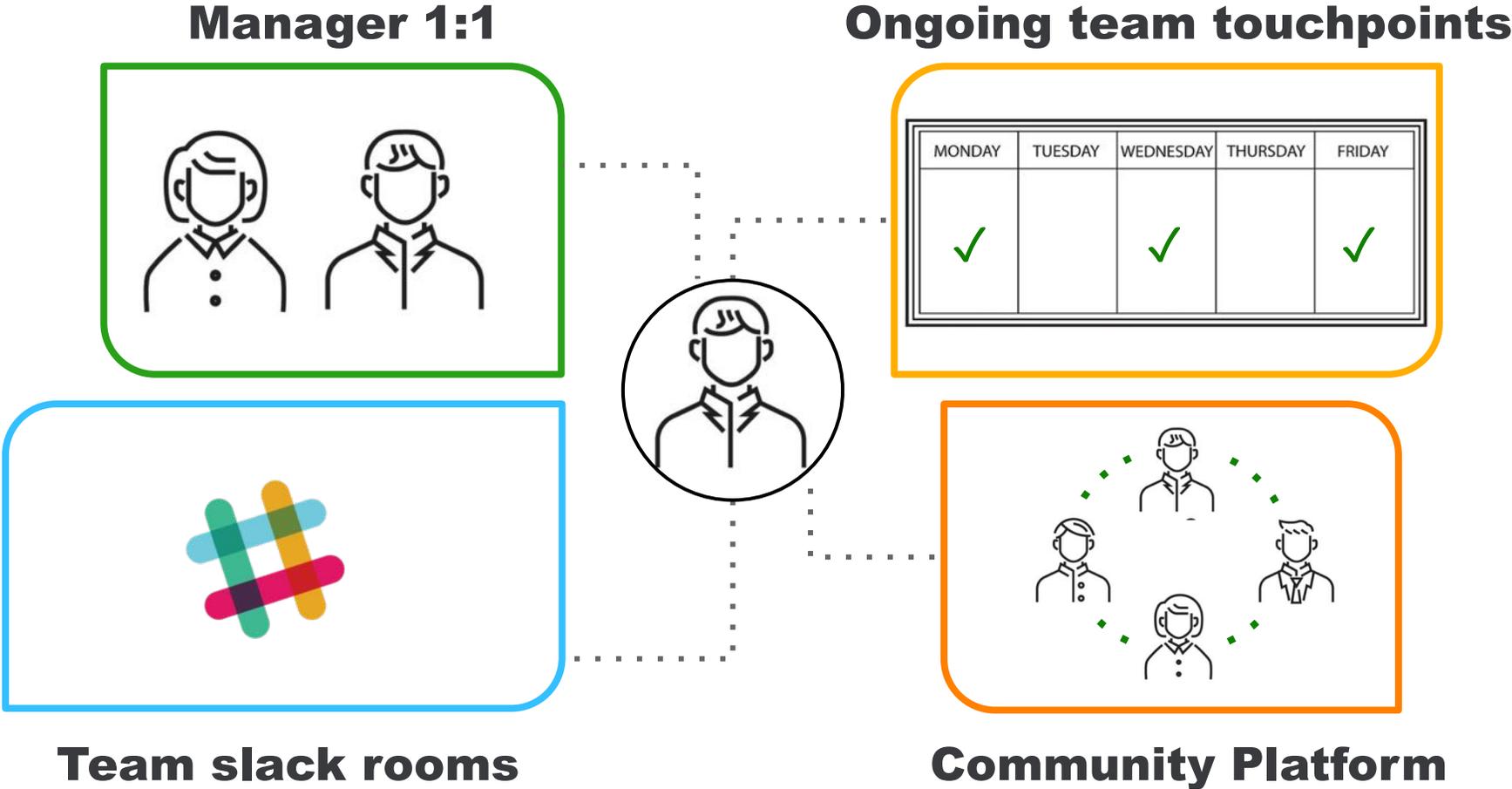


## Manager

Lead a team and shape our service

# Getting connected

Though remote, our bookkeepers are connected into the larger expert network



# Working on QuickBooks Live

## The Role:

Part-time (20-30 hours week)

Year-round work

A fixed schedule that fits your life, with hours between 6am and 6pm PST Monday through Friday

## Benefits:

401k enrollment with a match by Intuit

Employee stock purchase plan (ESPP)

Employee Assistance Program

Bonus incentives





# Q&A time!

# What do our Bookkeepers say?



“I've been a bookkeeper and an accountant for twenty five years but there are things that I don't know. And having the ability to reach out to anyone in our network to ask the questions I need to make certain that my small business receives the best service possible has been an amazing resource.” - *Dayna, 25 years of bookkeeping experience*



“Well we have a really flexible schedule; you can work from 6:00 a.m. to 6:00 p.m. (PST). We work all across the country and you can pick your times that work best for you and you can also work with your small businesses to find a schedule that works for both of you. So it's really flexible and it works well for everyone involved.” - *Kiva, 20 years of bookkeeping experience*

“Joining QuickBooks Live has definitely impacted my business in a huge way. I've been able to serve small business owners all over the United States. I'm not locked geographically to the small business owners in my area.” - *Jon, 3 years of bookkeeping experience*



# Session summary

## What is QuickBooks Live?

Ongoing, monthly bookkeeping service delivered in QuickBooks Online via a team of remote US-based Certified ProAdvisors

## How does QuickBooks Live help me, my practice, my firm?

- Earn extra money
- Work from home during hours you set
- Learn from a network of professionals about new industries, bookkeeping best practices, and new technologies

## What is it like to be a QuickBooks Live Bookkeeper?

Part-time role where I get to practice my bookkeeping craft while enjoying the benefits and stability of working in a large public company

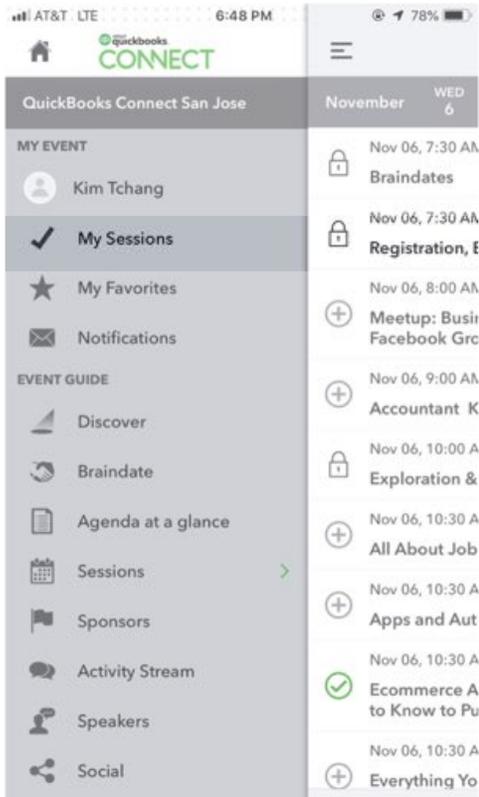
# What's next

- 1 Have specific Questions:**  
Come talk to us after the session
- 2 Attend another session to learn more:**  
Day in the Life of a QuickBooks Live Bookkeeper
- 3 Get QuickBooks ProAdvisor Certified**  
Friday 8AM - 2PM
- 4 Ready to join?**  
Come to the booth- Match with a recruiter for onsite screening

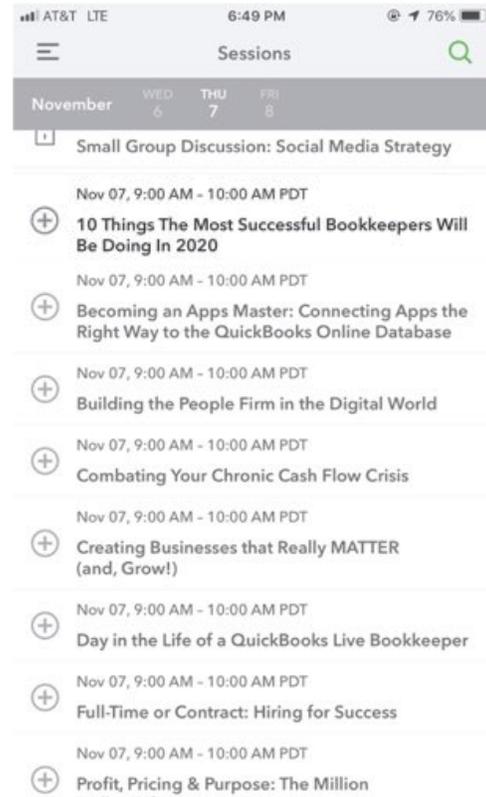
# Rate this Session on the QuickBooks Connect Mobile App

Provide feedback to help us design content for future events

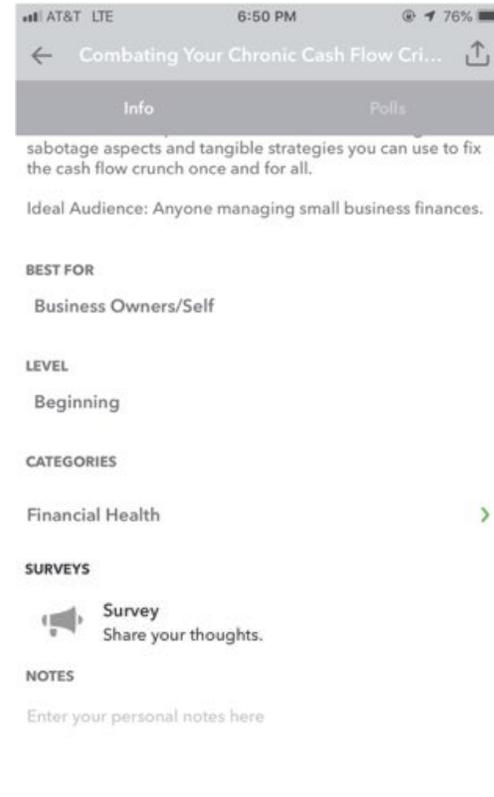
## 1. Select Sessions



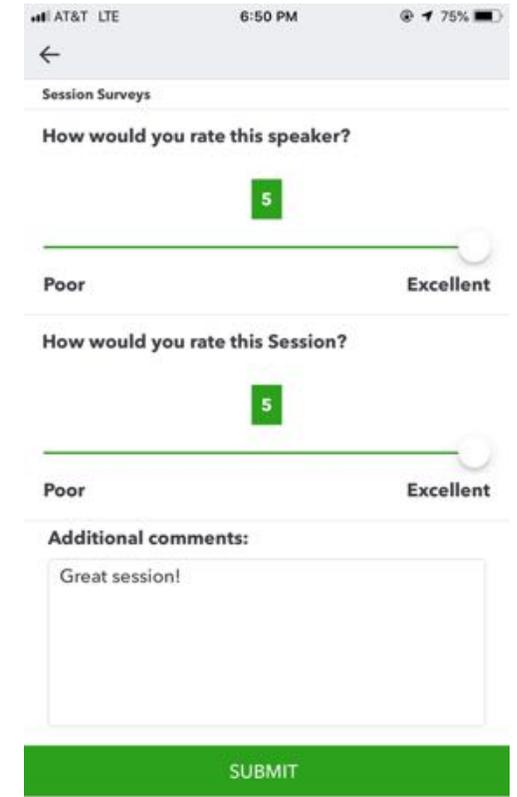
## 2. Select Session Title



## 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 page features a navigation bar with links for 'Why Attend', 'Agenda', 'Speakers', 'Pricing', 'Sponsors', 'Travel', and 'FAQ'. A 'Register now' button is located in the top right corner. Below the navigation bar, there are tabs for 'November 6: Accountant Day', 'November 7' (which is selected), and 'November 8'. A 'Print Agenda' button is also present. The main content area includes a search bar labeled 'Search for sessions' and a set of filters: 'Business Growth', 'Life & Business Skills', 'Organizational Culture', 'Technology Training', 'Advisory', and 'Financial Health'. The agenda items are listed in a table format with time slots on the left and session titles on the right. The sessions include 'Registration, Breakfast & Exploration', 'Braindates', 'Yoga', and 'Breakout Sessions' (which includes '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', and 'Small Group Discussion: Build Your Dream Bookkeeping firm').

QuickBooks  
**CONNECT** Why Attend Agenda Speakers Pricing Sponsors Travel FAQ Register now

November 6: 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	<b>Braindates</b> New this year, you can use Braindates to book time with fellow attendees, expert consultants and the QuickBooks support team. <a href="#">Learn more</a> Best for: All Audiences CPE Hours: not eligible
8:00-8:30 am	Yoga
8:00-8:45 am	<b>Breakout Sessions</b>
	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

 **CONNECT**

OWN  
THE  
FUTURE  
FUTURE