



Day in the life of a QuickBooks Live Bookkeeper



Speakers



Don Deliz

Intuit Expert
Network Leader



Jenna Theisen

Service Delivery Leader,
QuickBooks Live



Mark Farmer

Sr. Manager, Service
Delivery
QuickBooks Live



Jen Harpham

Manager,
QuickBooks Live Lab



Connecting people to experts

#QBConnect | WiFi: QBConnect

The Journey of a QuickBooks Live Bookkeeper

Joining the team

Ready...



Getting started

Set...



Being a QBK

Go!



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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-6PM PST M-F

Benefits:

401k enrollment with a match by Intuit

Employee stock purchase plan (ESPP)

Bonus incentives

Employee Assistance Program

Flexible scheduling

Learning and growth opportunities



#QBConnect

Disclaimer: Role and benefits subject to change



Qualifications

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

and 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



Identifying top talent at all levels

Qualifications



**Associate
Bookkeeper**



**Senior
Associate
Bookkeeper**



**Expert
Bookkeeper**



**Senior Expert
Bookkeeper**

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The 'unboxing' experience

Before your first day, we set you up with the gear you need for your remote workspace



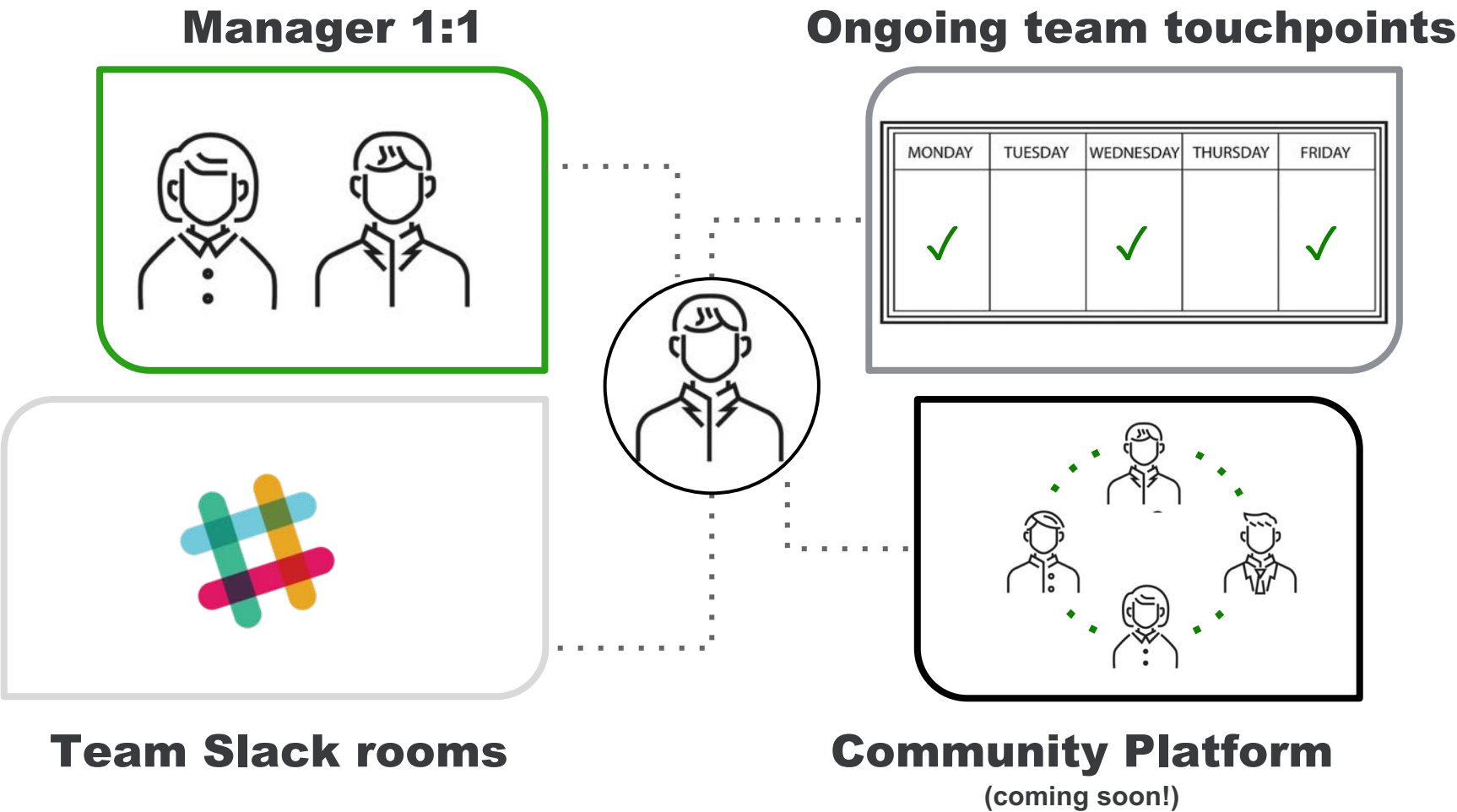
Our training program

The week-long training program includes self-paced learning, team touchpoints, and peer sessions



Getting connected

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

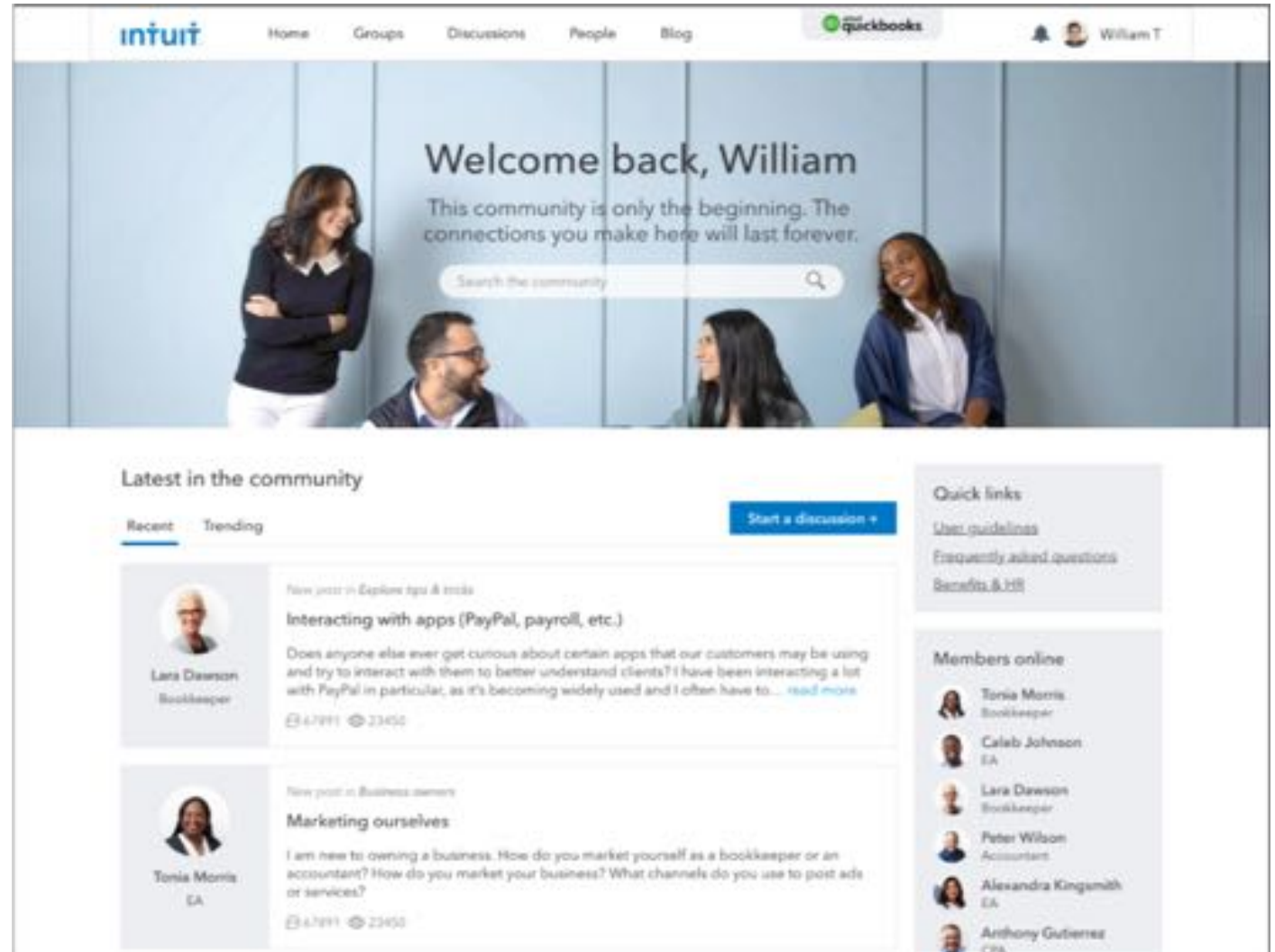


Community platform

The **expert** community platform seeks to provide a sense of belonging by providing a **personalized platform** for our experts to **connect**

Its focus is on **creating meaningful interactions and relationships** with other experts while providing opportunities for them to **keep their expertise sharp**

Coming soon!



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Go!



Working for QuickBooks Live

Make extra money

Earn an attractive hourly wage while working virtually from your home office.

Make more of your time

Manage your own schedule by taking appointments set up by Intuit that fit your availability

Make more small businesses successful

Help them set up their books, manage them month to month, and provide valuable insights through reporting. You'll also help them get the most out of using QuickBooks.

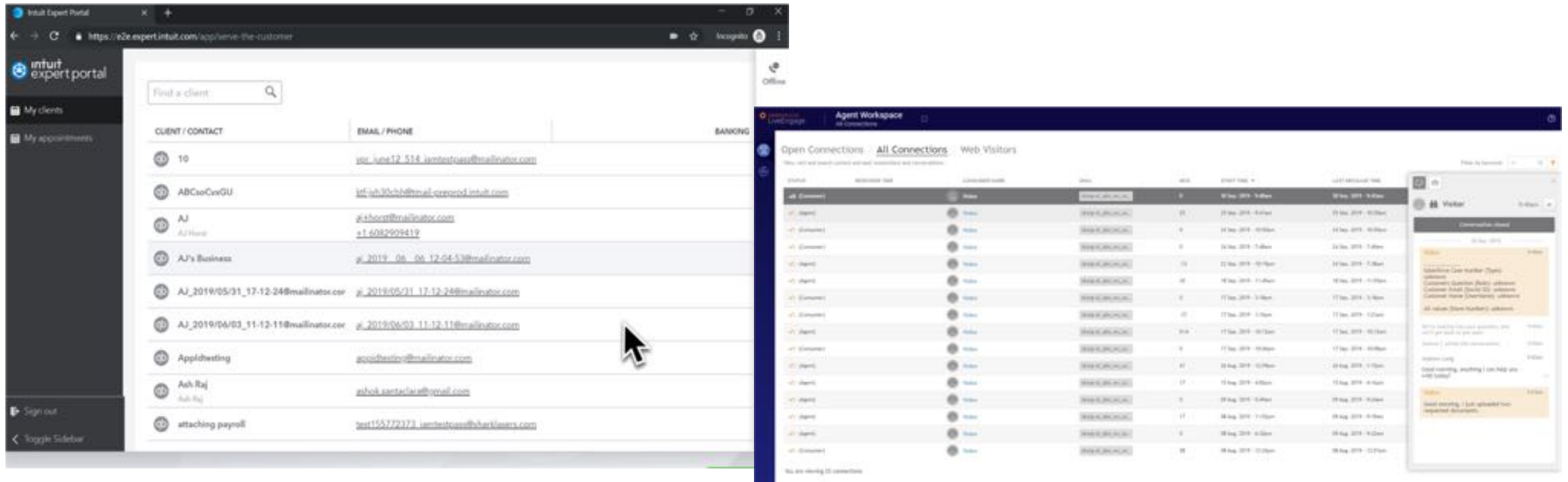
Make more of your talent

Exchange knowledge with an industry-leading community of bookkeepers and take advantage of available resources on demand.



Serving customers

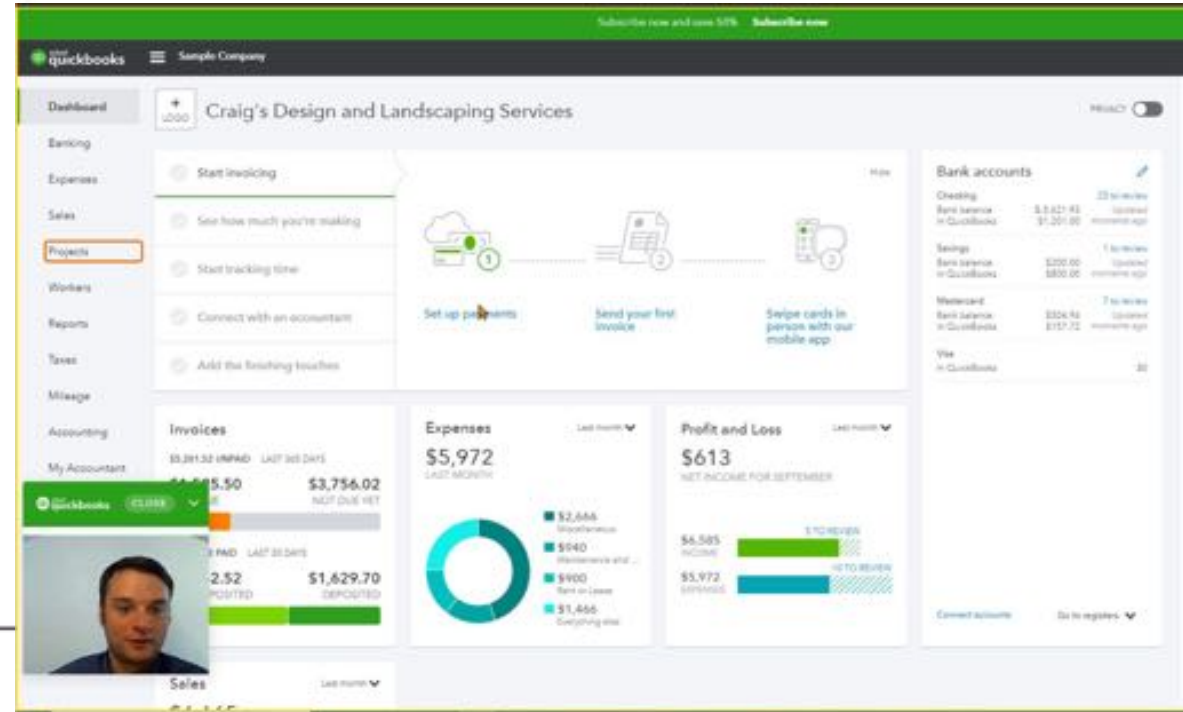
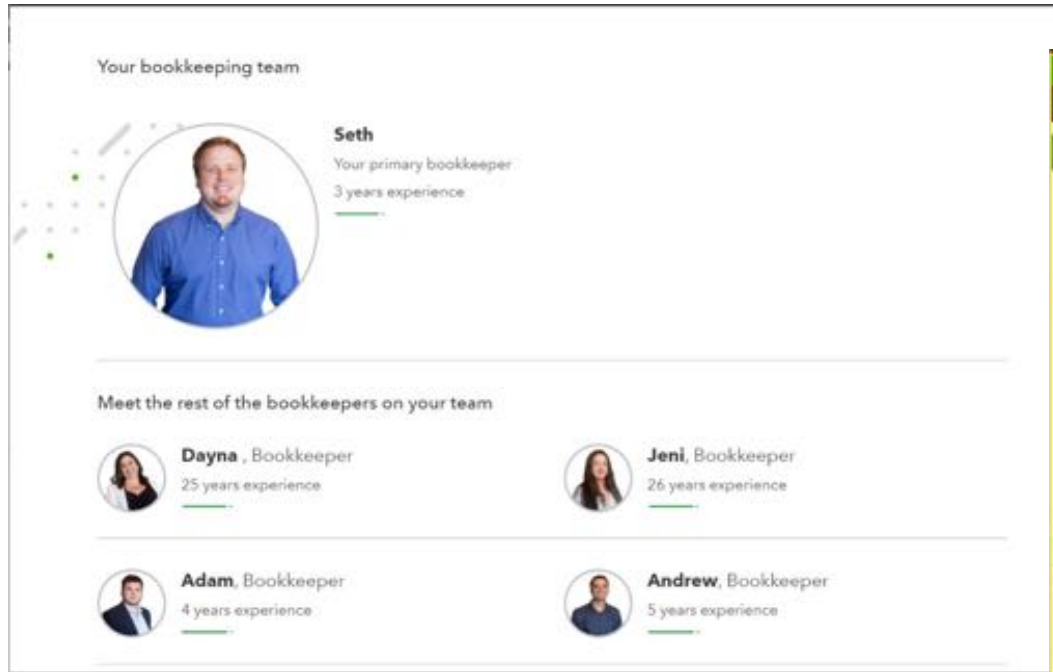
Serve as a primary Bookkeeper for a book of business...



...or specialize in delivering a piece of the customer experience

Serving customers

Leverage your team members and resources to solve the complex issues...



...and connect with your customers to share progress and offer support

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

"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



"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

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

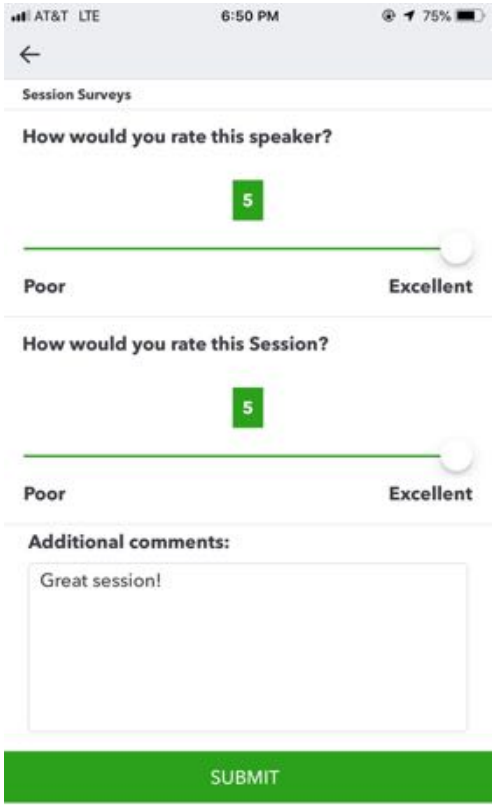
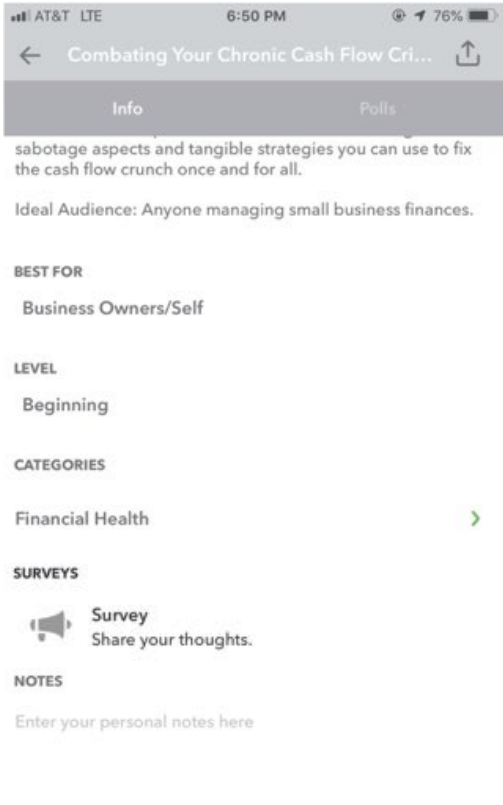
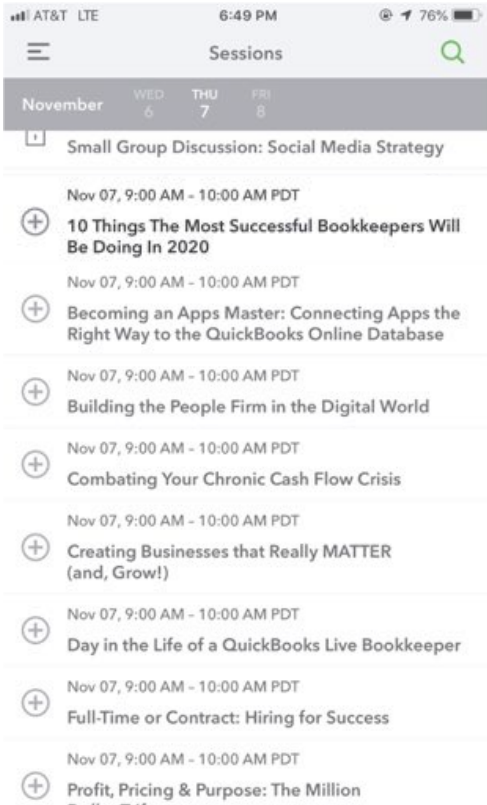
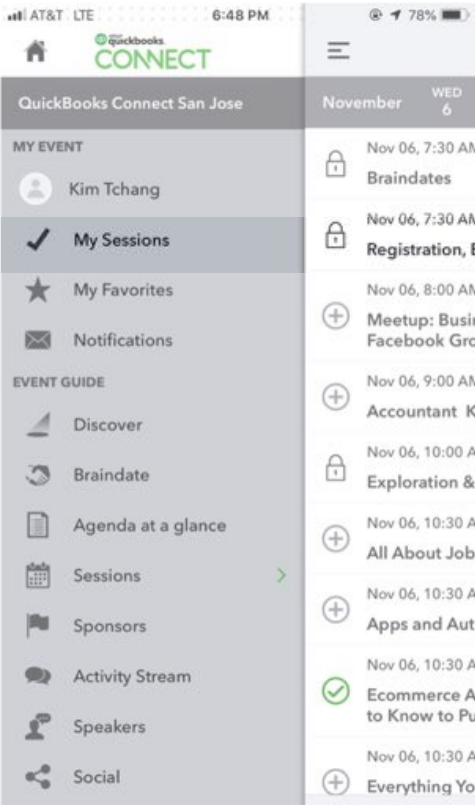


Questions

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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. The date 'November 7' is highlighted, with 'November 6: Accountant Day' and 'November 8' also visible. A 'Print Agenda' link is in the top right. Below the header, a paragraph describes the event: '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.' A search bar labeled 'Search for sessions' is present. Below the search bar are filter buttons: 'Business Growth', 'Life & Business Skills', 'Organizational Culture', 'Technology Training', 'Advisory', and 'Financial Health', followed by an 'Expand all +' link. The agenda list shows sessions for November 7:

- 7:30-7:00 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



OWN
THE
FUTURE



Graveyard

Our training program

2 weeks on training including live sessions, self-paced learning, Advanced Certification

Sun	Mon	Tues	Wed	Thurs	Fri	Sat

Getting connected

Manager one-to-ones

to set your schedule and make sure you're prepared for your first day; ongoing to provide coaching and support

Ongoing team touchpoints

to ask questions, swap tips, discuss procedure changes, and learn about upcoming plans and changes

Team slack rooms

to seek and share expertise, handle service issues, and communicate updates

Community Platform

to share your profile and connect with other experts on topics you care about



Our training program

The week-long training program includes self-paced learning, team touchpoints, and peer sessions

Friday	S	S	Mon	Tues	Wed	Thurs	Fri
Welcome Session			Tech / tools check Systems and tools e-learning	Xxxx and xxxxx e-learnings Team Touchpoint QBO Advanced Cert Study	Xxxx and xxxxx e-learnings	Xxxx and xxxxx e-learnings Team Touchpoint Shadow Session QBO Advanced Cert Study	Team Touchpoint Xxxx and xxxxx e-learnings Peer role play and feedback

Our training program



13 min

Bookkeeper Role

START

You will need your speakers on for this course.




powering prosperity

Welcome to

Training Support

Get Started



powering prosperity

Welcome to

Log Hours - Workday

Get Started





LIVE

6 min

Welcome to QuickBooks Live Training

START

You will need your speakers on for this course.