



# Moving clients online

Sam Rotberg

# Today's speaker



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Director, AS Partners  
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# About today's speaker



**Sam Rotberg**  
Director, AS Partners

In practice for 35 years  
Director of AS Partners for 29 years  
CPA, CA, Superannuation Specialist Advisor  
Director Outsourced Office ( Bookkeepers )  
Director of ASP Private Wealth ( Fin Planners )  
Director AS Mortgage Partners ( Mortgage Brokers )  
Venturing into General Insurance Broking June 1

A photograph of two young women with long blonde hair, seen from the chest up, engaged in a conversation outdoors at night. The woman on the left is in profile, looking towards the right, while the woman on the right is facing her. They are both wearing dark jackets. The background is dark and out of focus, with some green foliage visible. The text 'Take a few moments to CONNECT with your neighbour' is overlaid on the right side of the image in a white, sans-serif font.

**Take a few moments  
to CONNECT with  
your neighbour**

#QBConnect | WiFi: QBConnect Password not required

# **Today's agenda**

**Are you working in the cloud?**

**Where are many of our client's now ?**

**What we should think about before we move them to the cloud?**

**Why move to the cloud?**

**Are clients all the same?**

**Ways to structure a value add proposition?**



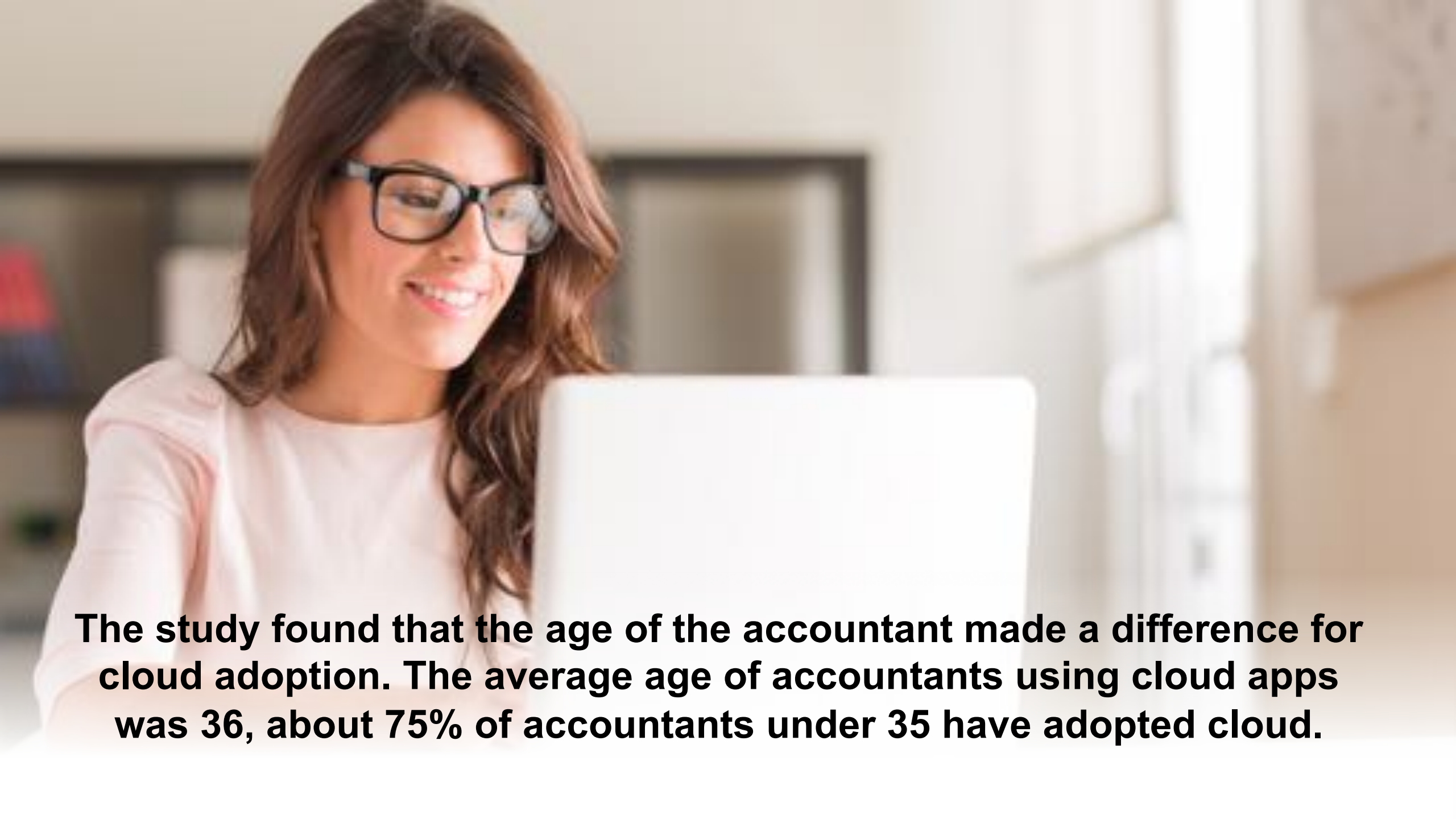
**How many of you currently use cloud technology  
to run your own practice?**



**About 2/3 of accountants and bookkeepers  
are using some form of cloud technology**

**ANALYTICS**





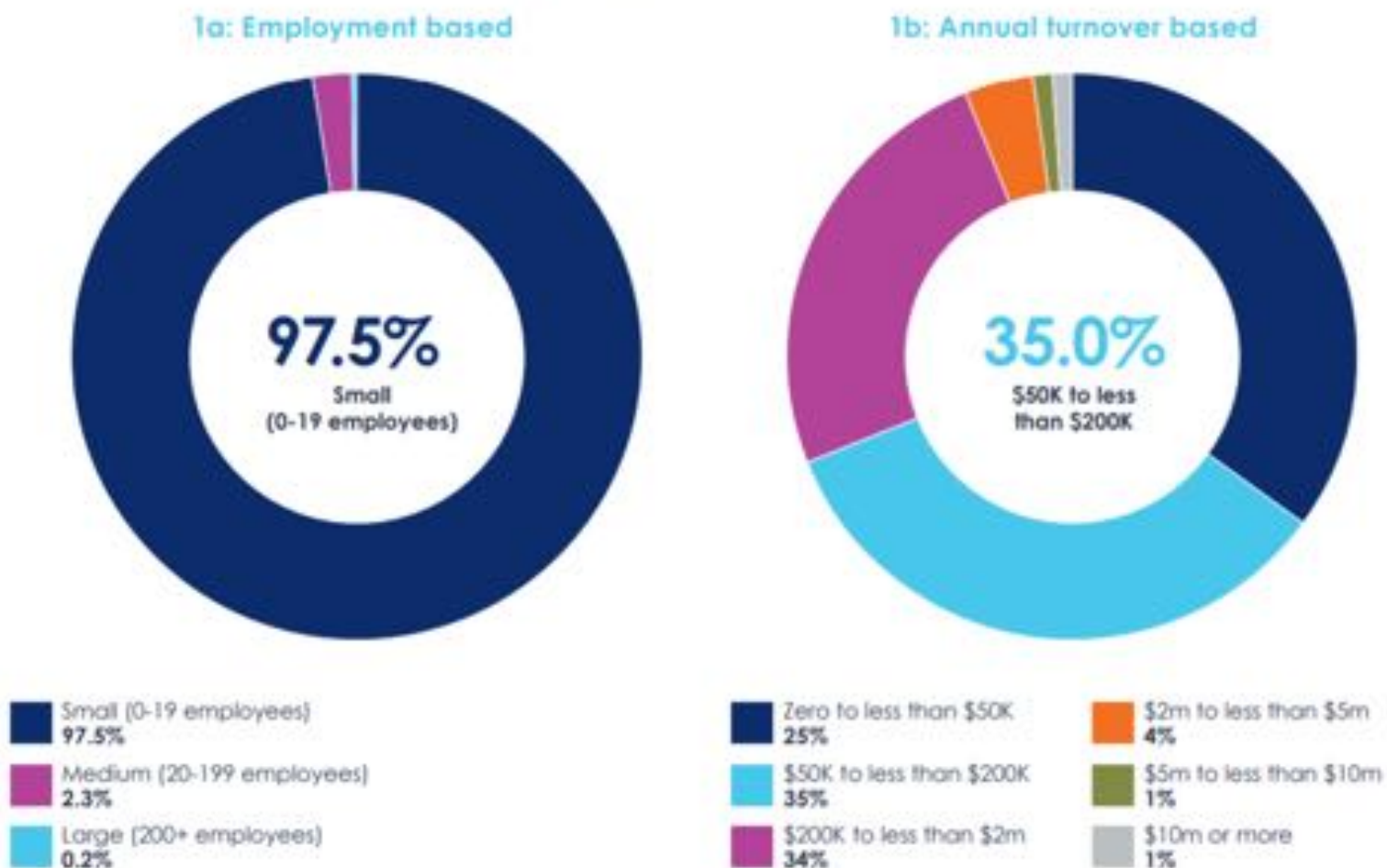
**The study found that the age of the accountant made a difference for cloud adoption. The average age of accountants using cloud apps was 36, about 75% of accountants under 35 have adopted cloud.**





**The average age of accountants not adopting the cloud was 40 and only 45% of accountants over the age of 50 have embraced the technology.**

**Figure 1:**  
**Australian business counts by size, as at 30 June 2017**



Source: ABS 2018, Counts of Australian Businesses, including Entries and Exits, Jun 2013 to Jun 2017, Cat. no. 8165.0, Table 13 and 17.



There are many similarities between accountants around the world: you want tools that help you save time, drive efficiency and grow your practice.

Rich Preece, Global Accountant Segment Leader - Intuit

**Where are our client's now?**







**Do we want our clients  
looking like this?**

# Statistics on small business stress

**70%** of small business owners claim to feel **stressed, anxious** and/or **depressed**

We're talking about the mental state of **1 Million** Australians

**95%** reported engaging with their public accountant reduced their **stress, anxiety** and/or **depression**

Source : ipa small business white paper ii (adapted from a presentation by prof andrew conway fipa ffa)

# Why we don't want our clients stressed

- We all care about our clients, want to service them well, so start by removing a stress that we can control.
- Take away the problems with manual systems, multi systems and desktop
- Take away a variety of paper based documents that they either lose or never file
- Take away the things they mostly hate. Bookwork

**Wouldn't we love  
all our clients to  
look like this**





# We want our clients happy

- Our caring and service-orientated nature allows us to help clients achieve happiness
- Give them the ability to have an up-to-date file that is accessible anywhere and on any device
- Show them how to reduce their paperwork
- Give them time back to do the things they really love and provide them with a work-life balance



**PAST**

**PRESENT**

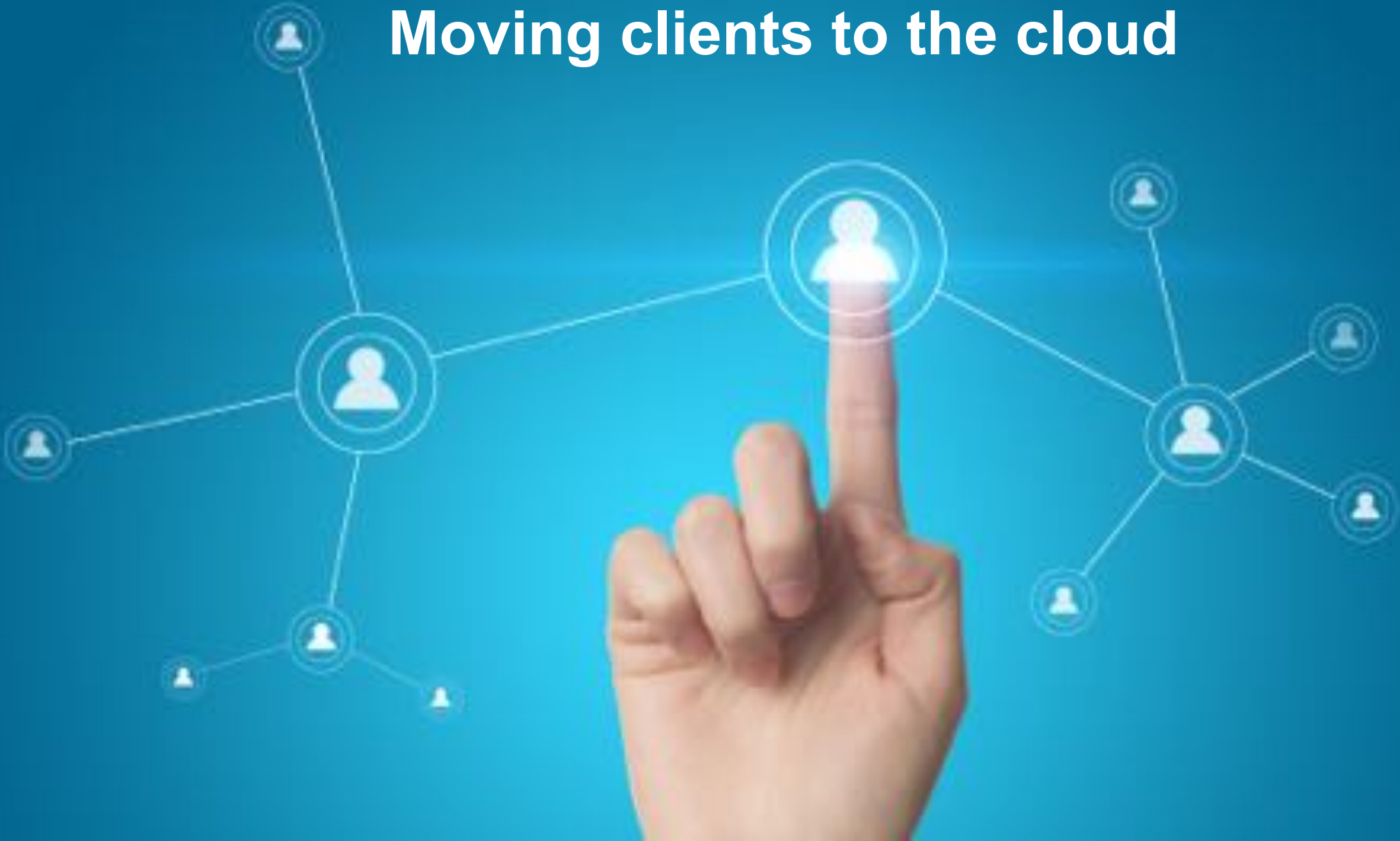
**FUTURE**

Let's get clients away from  
the past, move them to the  
now so we can talk  
about the future

**How we move clients to the cloud?**



# Moving clients to the cloud





# What accounting records are your clients using now ?



# What we need to think about before moving clients to the cloud

- We need to assess their current systems, ask them what their pain points are and then offer them a solution that will provide them a sustainable solution.
- This may include various apps like a management receipting system, inventory system and debt management systems.

**Give clients the  
ability to feel in  
control of their  
business by moving  
to the cloud**





**Are clients time poor,  
afraid of change or lost?**

**What we offer clients:**

**Knowledge of technology**

**Assurance and support**

**Confidence**

**Ongoing reporting**

**Ongoing advice**



**Are clients all the same?**



# Three stages of business life



**Start up businesses**  
Age group 20 - 35



**Growth phase businesses**  
Age group 30 - 55



**Mature businesses**  
Age group 50 - 65

# Start up businesses



- Generally younger
- Passion for technology
- Expect everything NOW

## Start up businesses

Age group 20 - 35

# Start up businesses

## Common client concerns

- Lack of funds
- Lack of time for a new skill

## How to explain benefits

- Cloud technology is cheap
- AI means greater efficiencies
- Data accessible anywhere and on any device
- Up-to-date data accessible NOW

# Growth phase businesses



- Set in their ways
- Tentative of technology
- Concerned about security

## Growth phase businesses

Age group 30 - 55



# Growth phase businesses

## Common client concerns

- Bookkeeping and accounting fees
- Security of the cloud
- Why change from desktop

## How to explain benefits

- Direct bank data feeds
- How AI works and it's efficiencies
- STP coming very soon
- Accessibility of files
- Up-to-date information
- Timely advice

# Mature businesses



- Planning to exit
- Afraid of change
- Apathetic to new skills

## Mature businesses

Age group 50 - 65

# Mature businesses

## Common client concerns

- Learning a new skill
- Why change systems now
- Afraid to lose privacy

## How to explain benefits

- Time savings
- Ensures compliance
- Cloud security
- STP coming very soon
- Planning an exit or retirement

# Ways to Provide a Value-Add Proposition



# What can you do to help your clients move online?



## Package up offerings with a fixed price

- Creates certainty in offering and price for the client
- Provides you an ongoing income stream

# WIN WIN



# Fixed price packages to offer your clients



## Option 1

Up, running and going



## Option 2

Report and support



## Option 3

Here, there and everywhere

# Option 1 – Up, running and going



Up, running and going

- This could be setting up the cloud file, including Chart of Accounts, Employees and start bank feeds
- Training limited to 3 hours in the first month
- Reconcile the books quarterly and lodge BAS

## Option 2 - Report and support



**Report and support**

### **Option 1 plus:**

- Monthly reconciliation
- Quarterly Reporting (P&L and Balance Sheet)
- Monthly IAS lodgement
- Quarterly BAS lodgement
- Training 4 hours in the first month and 10 phone calls per month

# Option 3 - Here, there and everywhere



**Here, there and everywhere**

## **Option 2 plus:**

- Monthly reconciliation
- Monthly Reporting (P&L and Balance Sheet)
- Monthly IAS lodgement
- Monthly/Quarterly BAS lodgement
- Training 4 hours in the first month and Unlimited phone calls per month

# Summary

- All businesses need to be working in the now with cloud technology
- Embrace the cloud yourself to convert your clients
- Be aware of the segments when delivering solutions
- Don't forget STP starts 1st July 2019
- Provide packages as a Value Priced Service



# Questions?



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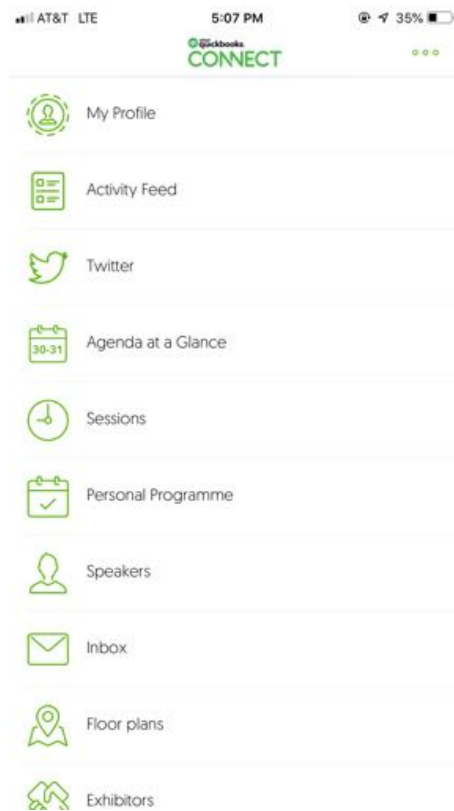


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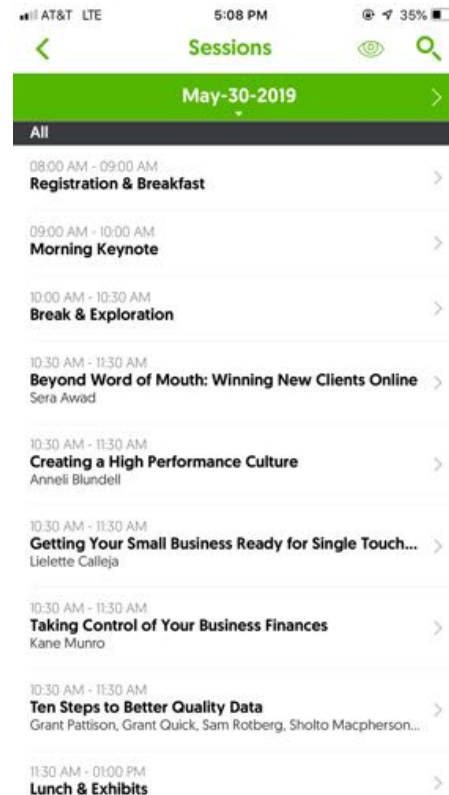
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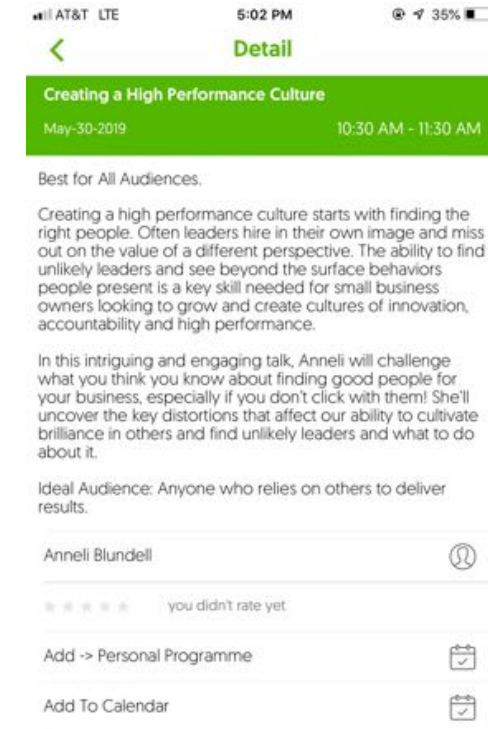
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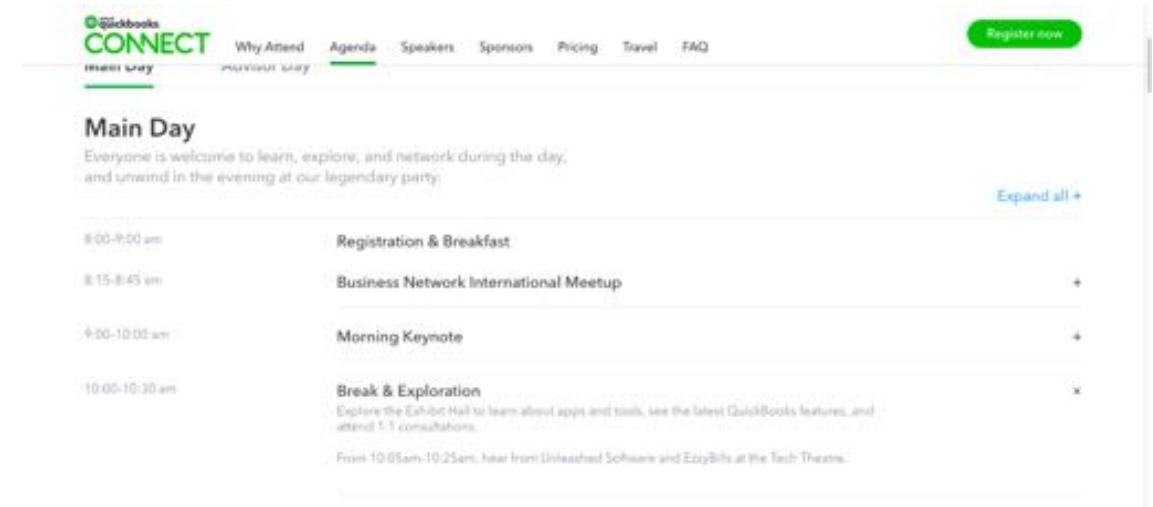
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