



Tech Stack implementation – For real!

Erin Vukelich



A photograph of two young women with blonde hair, seen from the chest up, engaged in conversation outdoors at night. The woman on the left is in profile, looking towards the right, wearing a dark jacket with a light-colored fur collar. The woman on the right is seen from the back, looking towards the left. The background is dark and out of focus, showing some green 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



Welcome to Tech Stack implementation!

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

Related sessions

Apps & automation for your firm: Michelle Long on Wed 10:30am

- Discover benefits of standardizing and automating workflows for your clients data and your firm too. We will discuss several possible apps for many workflows to APPify the Processes™ for your clients and your firm.

Becoming an apps master: Connecting apps to QuickBooks Online database, for your clients: Liz Scott on Wed 2:30pm and Thurs 9:00am

- Gain insight into the design and configuration of QuickBooks Online at the database level. Together, we will examine the basic tables of the more frequently used areas of QuickBooks Online when connecting 3rd party apps to help you make more informed decisions as to what apps will help clients accomplish tasks and lead to a better outcome overall.

Today's speaker



Erin Vukelich

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@ErinVukelich44

Agenda

Researching and testing applications

- So many options! How to choose which apps to use?

Identifying test clients

- We have to start somewhere, but where do we begin?

Onboarding and beyond!

- How do we plan out onboarding and move to the next level?

Q&A and takeaways

Client Impact

Using technology to drive client impact.

We are at QBC to improve the ways we make an impact on our clients.

- This could be by improving our advisory skills or finding new tech to begin working with our clients or something else entirely. In the end, it all comes back to what we can do for our clients.

Are we choosing and implementing technology because it is “new” or because it will really make an impact?



The most important thing about a technology is how it changes people.”

Jaron Lanier, *You Are Not a Gadget: A Manifesto*



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Q&A and takeaways

Researching apps

How do we choose the best application for our clients and ourselves?



Identify your ideal client or client base:

- Current client base?
- Client base in the next 3 years?
 - 5 years?
 - 10 years?
- Niches?
- Client customer types?
- Revenue streams?

Researching apps

How do we choose the best application for our clients and ourselves?



Identify your needs as an application provider/expert:

- App Company history?
- Customer support?
- Mobile access?
- Customized reports?
- Industry specialization?
- Ease of use?
- User interface?
- One way sync vs two way sync?
- Pricing strategy?

Testing applications

Preparation

- Keep on hand a QuickBooks Online file that contains the following:
 - Vendors/Customers/Transactions/Products/Services/etc.
- If possible, use the application in your own practice:
 - Example: time keeping, expense management, invoicing/sales

Testing follow-up

- Communicate with vendors on any issues
 - Can the issues be resolved? If not, is this the right app for you and your clients?
- Begin review of current client list
 - Time to identify clients who are willing to test out new technology!

Communication is huge! Ask questions and test anything that you can!

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Identifying test clients

How do we identify clients who are willing to test the applications?



Review your client list and pick some clients that meet your criteria.

After identification, have a conversation with your client. This is your chance to deep dive into what their business is and what their needs are.

Remember to listen!

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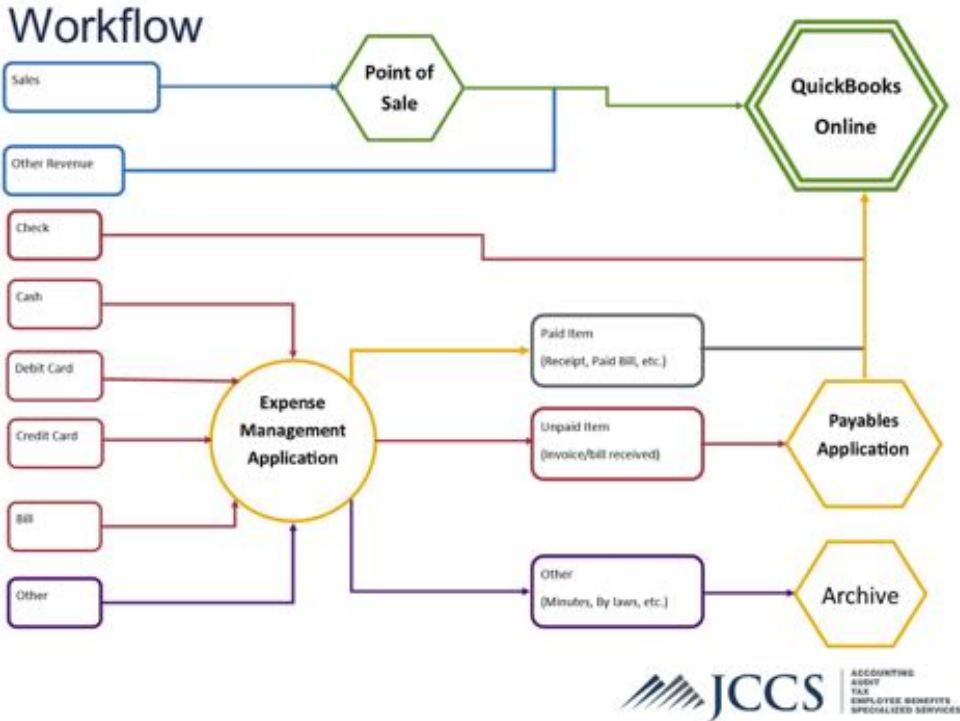
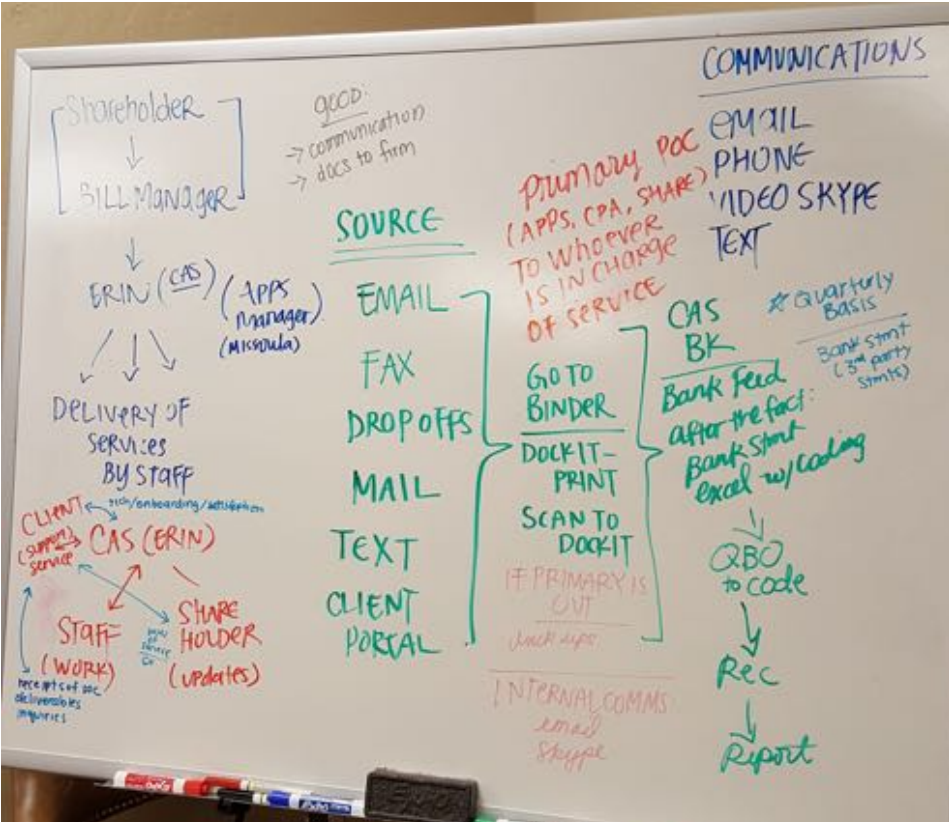
Onboarding and Beyond!

- How do we plan out onboarding and move to the next level?

Q&A and Takeaways

The work begins!

Information workflows!



Here we go!

Client and employee training



Implementations can be small to very complex.

Be prepared for the inevitability of something going wrong and prepare your client for that eventuality.

Use a tool to help you track the process and record as many notes as possible.

Follow-up and review

We need to create a process that can be duplicated, but how do we do that?

Template to Duplicate - QBO Conversion

- ☐ Template to Duplicate - QBO Conversion
 - Use this template to create QBO conversion tasklists.
 - ☐ Request QBDT backup from client
 - ☐ Review QBDT file for number of targets, accounts, and classes
 - ☐ Review QBDT file for A/R and A/P module usage
 - ☐ Review QBDT for any applications that are connected
 - ☐ Send client any changes that need to be made to the file
 - ☐ Select conversion date with client
 - ☐ Retrieve backup from client for conversion
 - ☐ Create the QBO file and assign any necessary users
 - ☐ Turn off payroll service in QBDT if necessary
 - ☐ Convert the file
 - ☐ Compare the trial balance from QBO and QBDT for ALL DATES
 - ☐ Review A/R and A/P and adjust if necessary
 - ☐ Reconcile all bank accounts to latest bank rec in QBDT
 - ☐ Send client an invite to the file
 - ☐ Send request to client to connect bank accounts (and other apps)

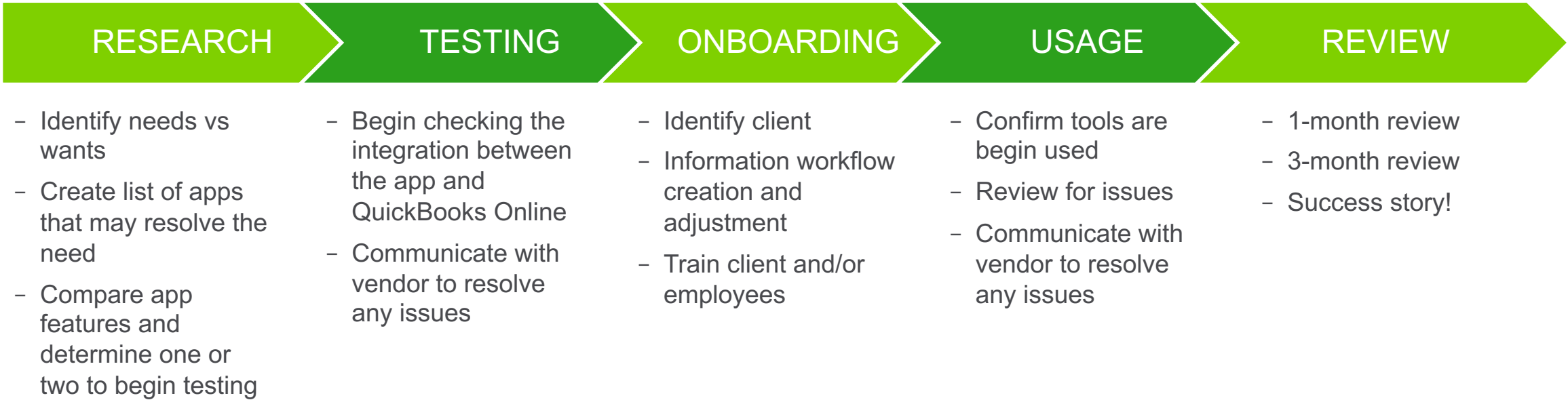
Take the notes you've made and begin to plan out a process to replicate.

Have an open conversation with your test client(s) to get honest feedback.

Create a list of “no-go’s” to prevent future mistakes.

Prepare a success story document to share with your staff/firm/other clients.

Process flow chart



REMEMBER: Client impact is our driving force behind implementation.

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Q&A and Takeaways

Where do we find the time?

One of the most difficult parts of making your implementation a success is finding the time to do it!

Research

- Block out 1 hour per week for research;
- This allows us to stay on top of our current apps and also look into new apps.

Testing

- In my opinion, this is the step that gets skipped the most because it can be very time intensive;
- Block out 1-2 hours per week for testing.

Onboarding

- This step takes the most time because it doesn't just stop; we're actively communicating with our clients over the course of several months;
- Preparing an onboarding schedule lets us schedule out specific meeting times.

REMINDER: The success of implementation can be very dependent upon the amount of time spent on it.

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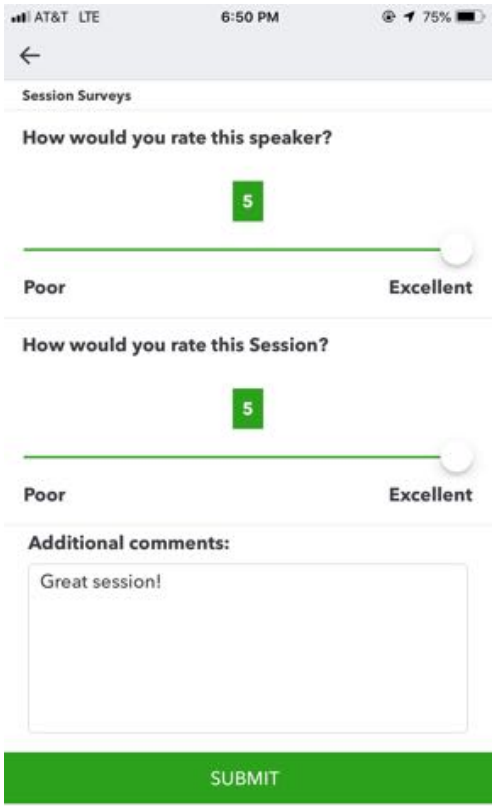
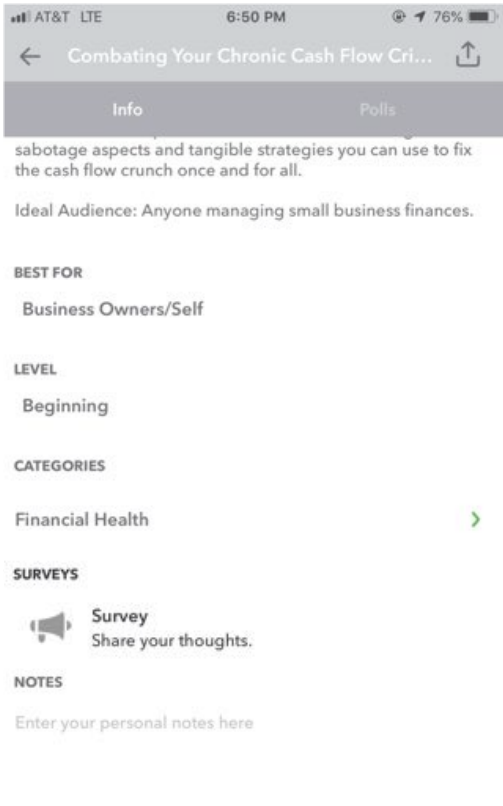
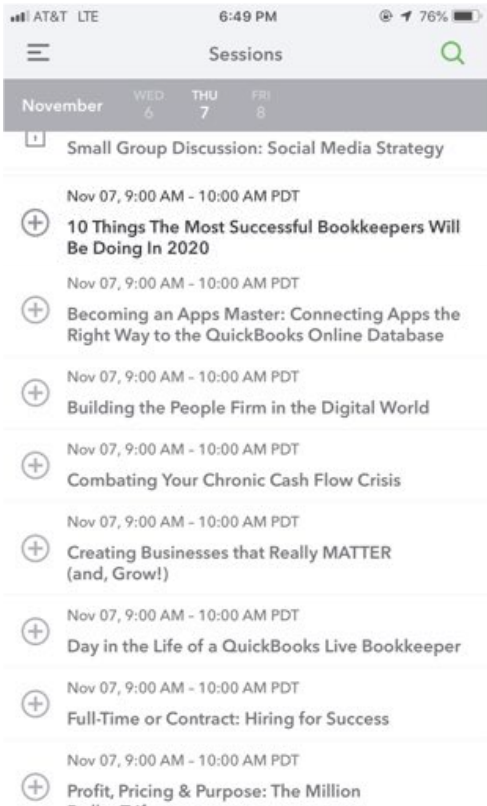
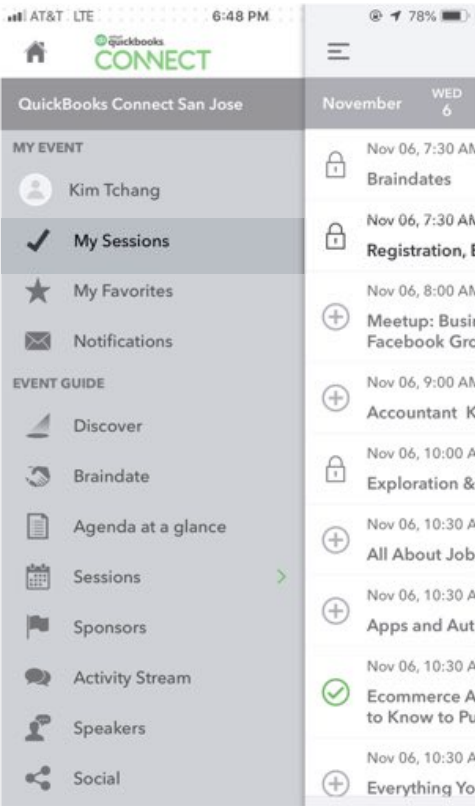


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<https://quickbooksconnect.com/agenda/>

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. The first session is 'Registration, Breakfast & Exploration' from 7:30-9:00 am. The second is 'Braindates' from 7:30-10:30 am, with a description: 'New this year, you can use Braindates to book time with fellow attendees, expert consultants and the QuickBooks support team. Learn more.' It also notes 'Best for: All Audiences' and 'CPE Hours: not eligible'. The third session is 'Yoga' from 8:00-8:30 am. The fourth is 'Breakout Sessions' from 8:00-8:45 am, which includes several sub-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', and 'Small Group Discussion: Build Your Dream Bookkeeping firm'. Each session has a '+' icon to its right for more information.

QuickBooks CONNECT

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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

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