Tech Stack implementation – For real!

Erin Vukelich


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Welcome to Tech Stack implementation!

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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^{TM} for your clients and your firm.

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Today's speaker

Erin Vukelich

Client Advisor at JCCS, PC

@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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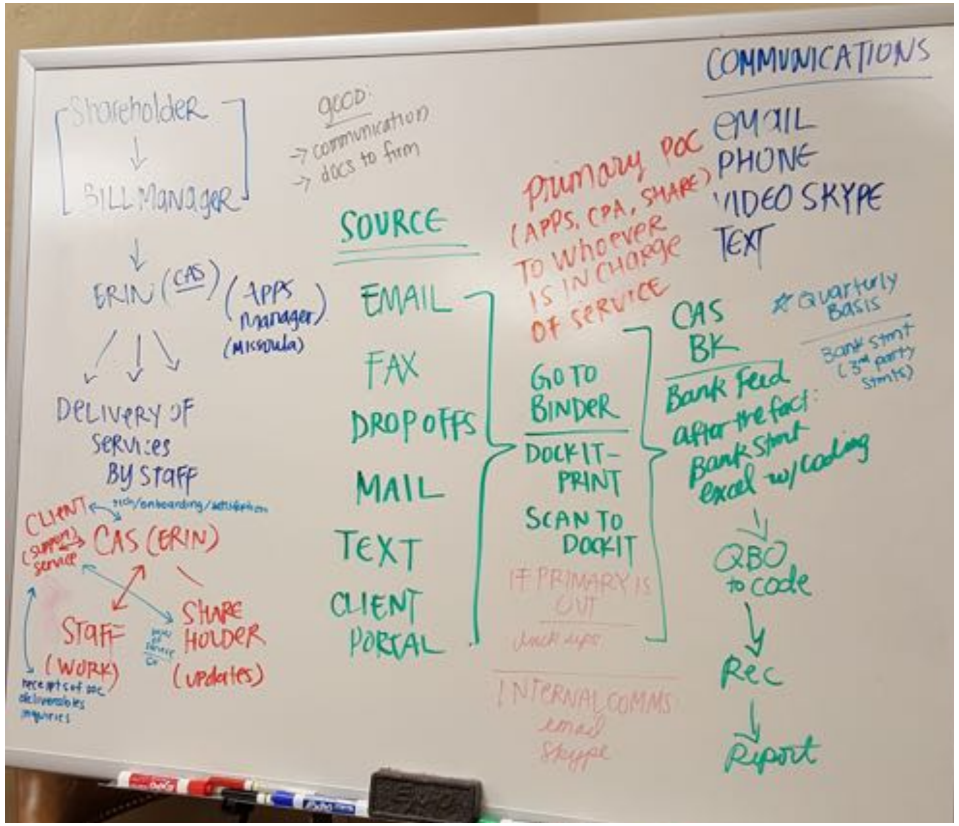
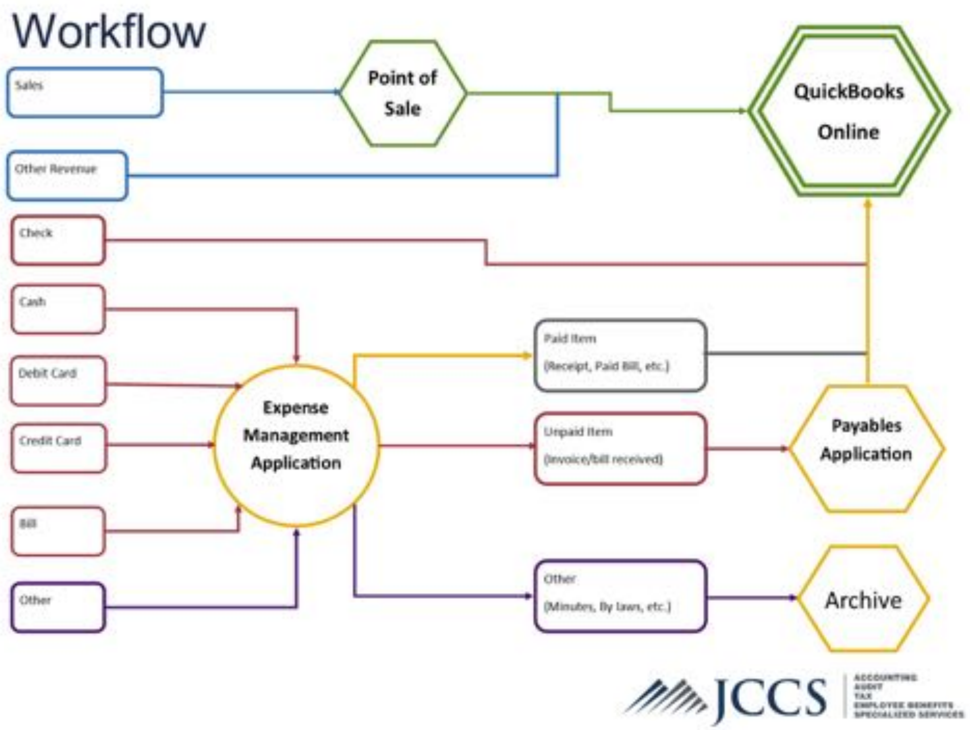
Q&A and Takeaways

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

RESEARCH

- Identify needs vs wants
- Create list of apps that may resolve the need
- Compare app features and determine one or two to begin testing

TESTING

- Begin checking the integration between the app and QuickBooks Online
- Communicate with vendor to resolve any issues

ONBOARDING

- Identify client
- Information workflow creation and adjustment
- Train client and/or employees

USAGE

- Confirm tools are begin used
- Review for issues
- Communicate with vendor to resolve any issues

REVIEW

- 1-month review
- 3-month review
- Success story!

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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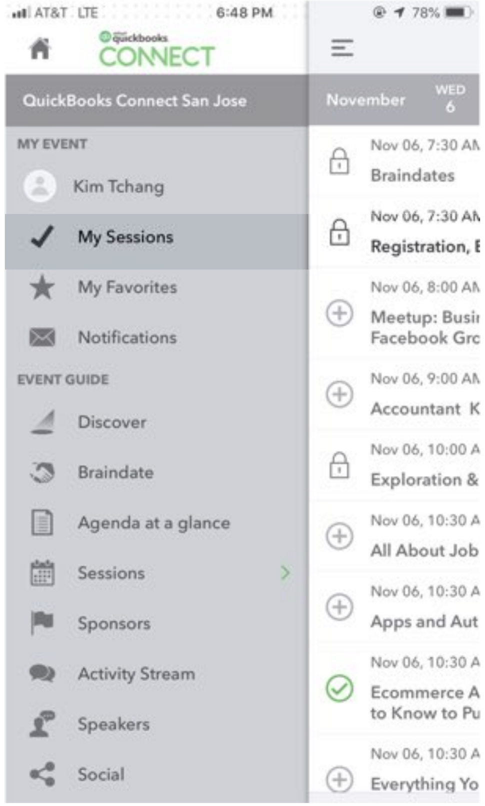

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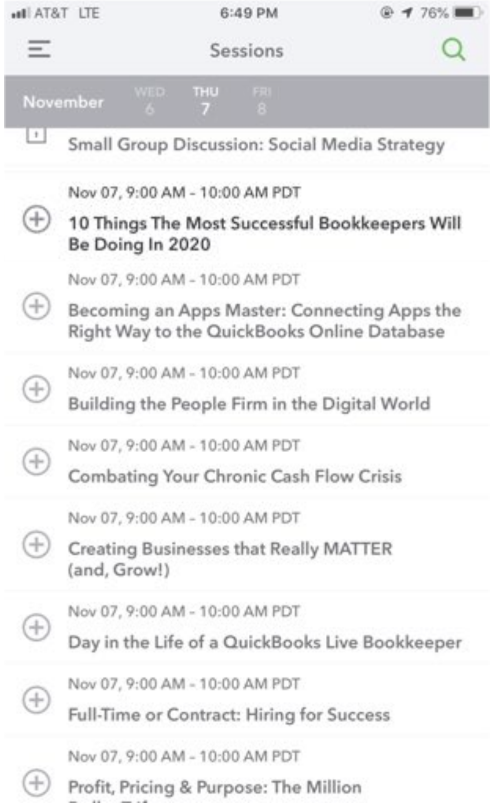

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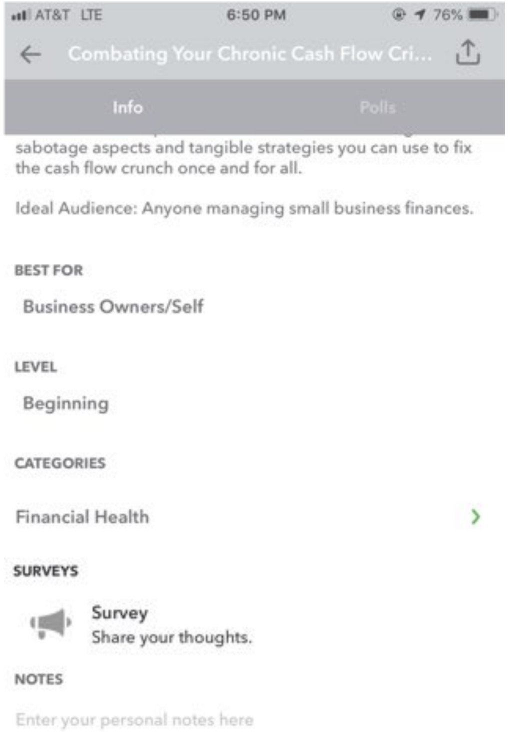

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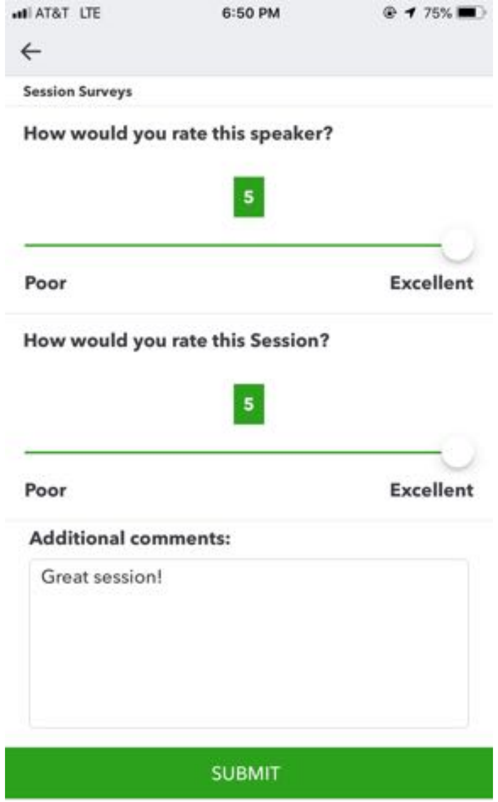

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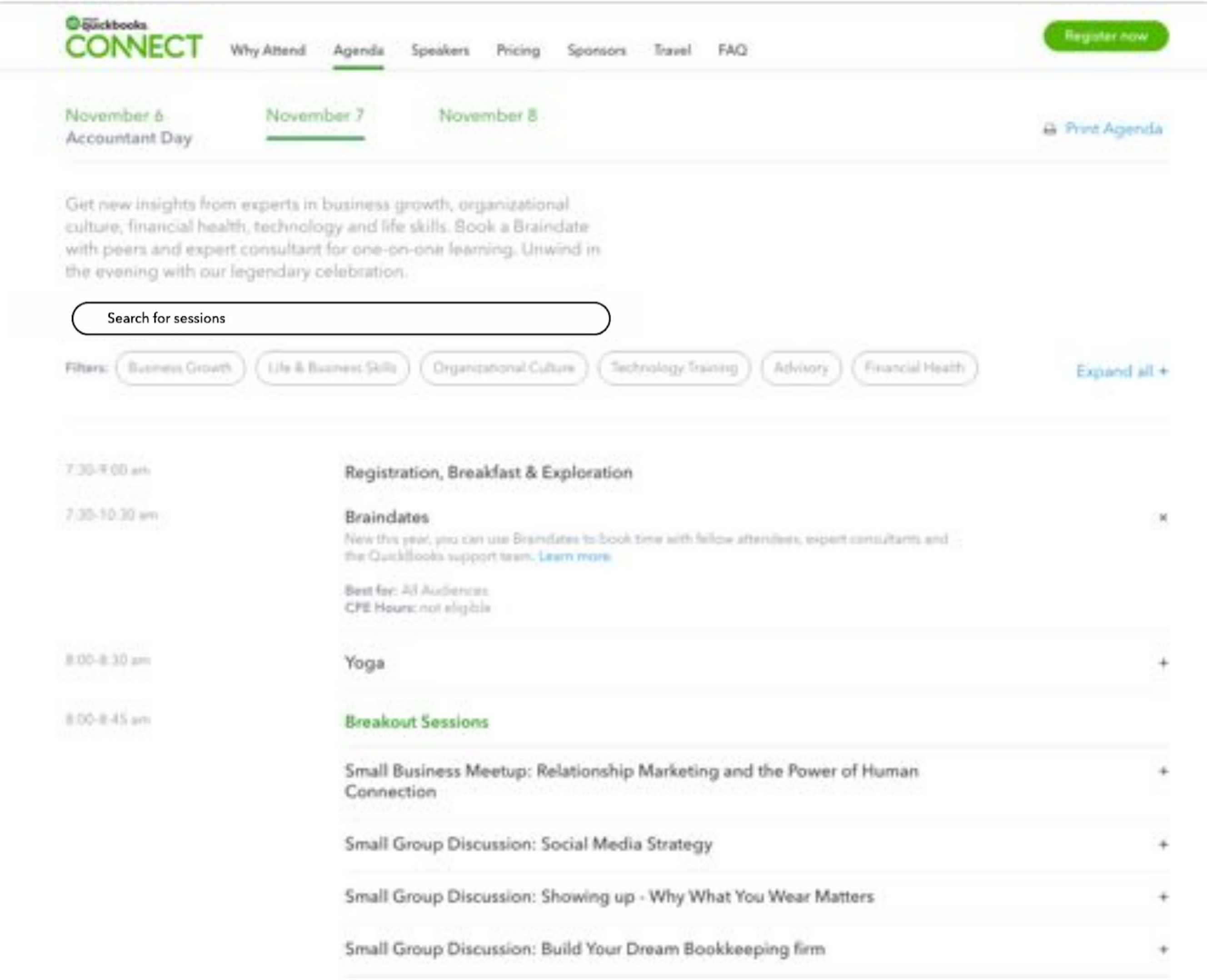

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