



# Apps and automation for your firm

Michelle L. Long, CPA, MBA



A woman with blonde hair in a ponytail, wearing a dark green jacket with a white fur-lined hood, is shown in profile, looking towards the right. She is in a crowd of people, with another person's back visible in the foreground. The background is dark with some green and blue bokeh lights.

Take a minute  
to connect with  
your neighbor

#QBConnect | WiFi: QBConnect

# 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

# About today's speaker



**Michelle L. Long, CPA, MBA**  
Long for Success, LLC

**International speaker** – Intuit Trainer/Writer  
Network since 2007

**Co-Host** – <http://QBPowerHour.com>

**Author – 5 Books including:** QuickBooks Practice Sets, How to Start a Home-Based Bookkeeping Business, Successful QuickBooks Consulting, co-author QuickBooks and QuickBooks Online Advanced Certifications and more

# Agenda

Recognize the benefits to standardizing and automating your firm

Discover various apps to help transform workflows (i.e. APPify the Processes™) for your clients and for your firm

# Related sessions



**Tech Stack Implementation** – Erin Vukelich, on Wed 10:30 and 1:00

Learn to review, test, and onboard your clients onto your chosen tech stack applications. Focusing on client impact, we will review techniques to begin the implementation process and duplicate it in the future.



**Becoming an Apps Master: Connecting Apps to QuickBooks Online Database, for Your Clients** – Liz Scott on Wed 2:30 and Thurs 9:00

Gain insight into the design and configuration of the QuickBooks Online database. Learn safeguards and limitations of the database as well as basic tables structure knowledge useful for connecting 3<sup>rd</sup> party apps.



# Benefits to Standardizing and Automating your Firm

# Benefits of standardization

Efficiency

Consistency of client experience

Scalability

Capitalization of firm knowledge

Streamlined transition of roles and responsibilities

Ability to automate



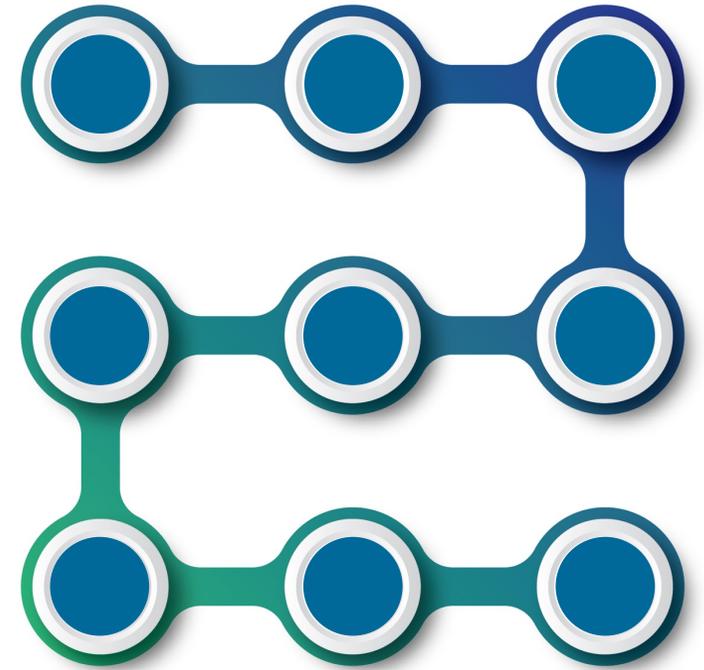
# Standardized firm

Focuses on a single industry and business model

Offers a fixed range of services with deep and effective levels of expertise

More quickly on-boards clients AND team members

**Variation is the enemy!**



# Clients of a standardized firm

Fit your standardization

Coachable

Value you/your firm beyond accounting /  
bookkeeping / tax prep

Willing to adopt technology and processes  
you recommend

**Focus on the right clients!**



# Steps to transform your practice

Determine your specialization

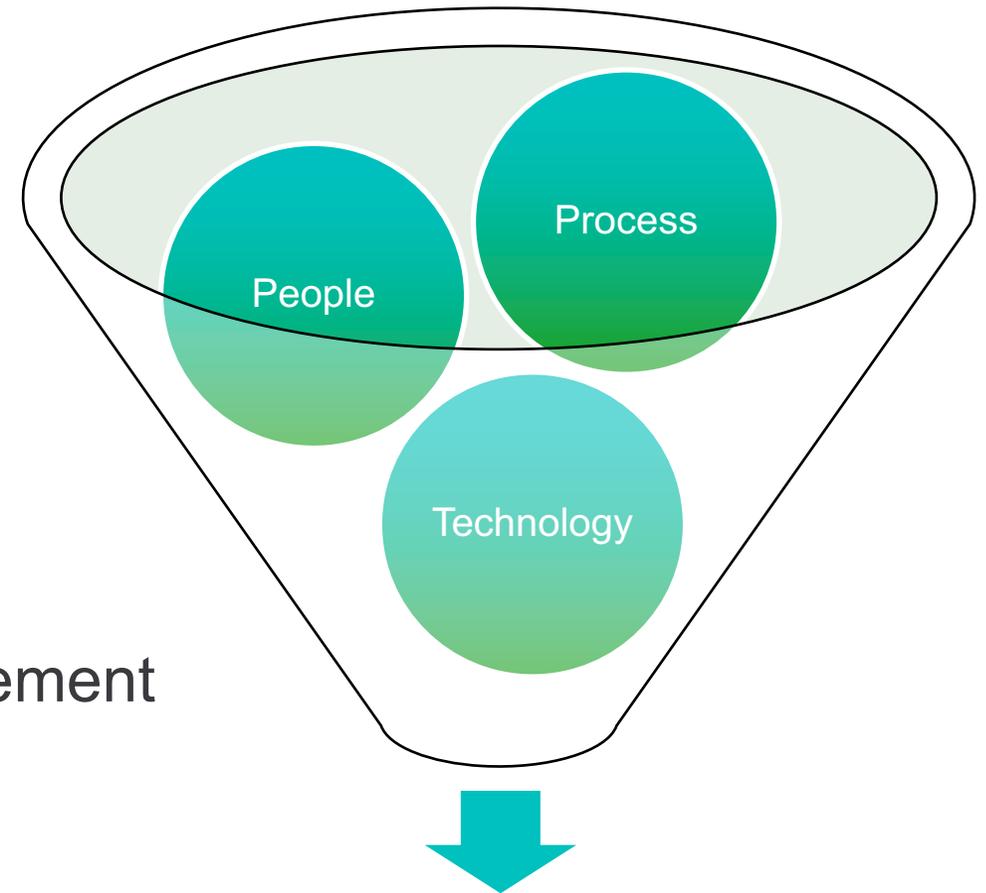
Create a team

Map, document and automate the processes

Train to processes and over-manage adoption

Improve processes and modify documentation

Aero Workflow and Karbon are practice management apps with many processes mapped out



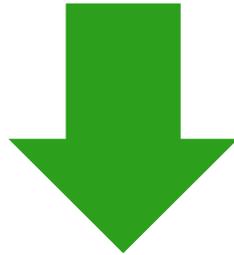
**Standardized Service**

# Benefits of Automation – for Clients

Timely information

Collaboration

Connection of front end to back end



**Significant, game changing  
reductions in data entry**

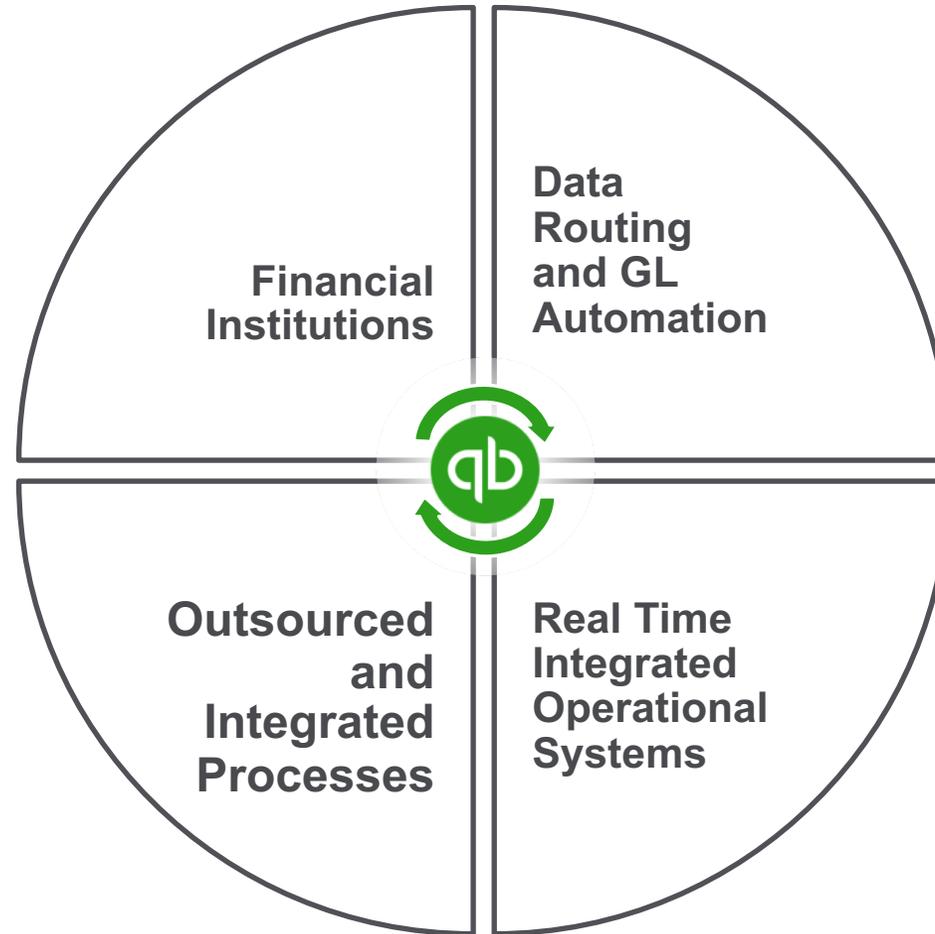




# APPify the Processes™ for your Client's Data

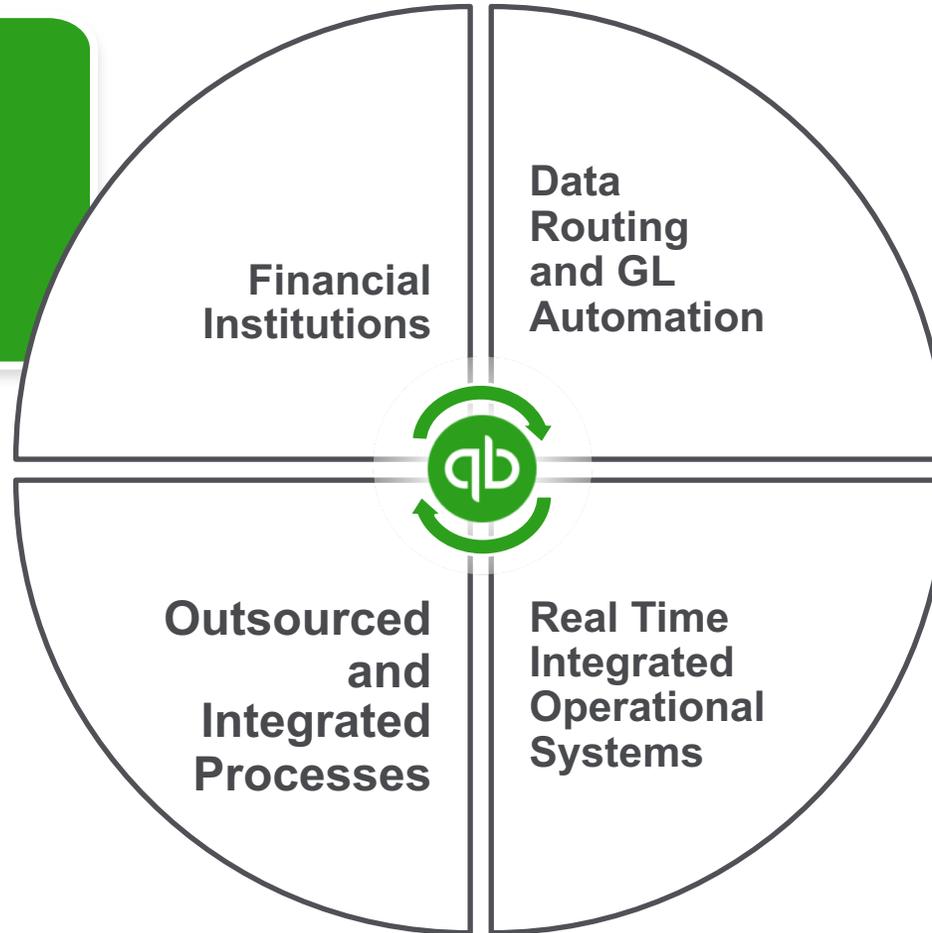
# APPify the Processes™ for client data

Scenario: Accounting / bookkeeping services



# APPify the Processes™ for client data

Bank Feeds to GL  
Credit Cards to GL  
Lending Companies  
to/from GL



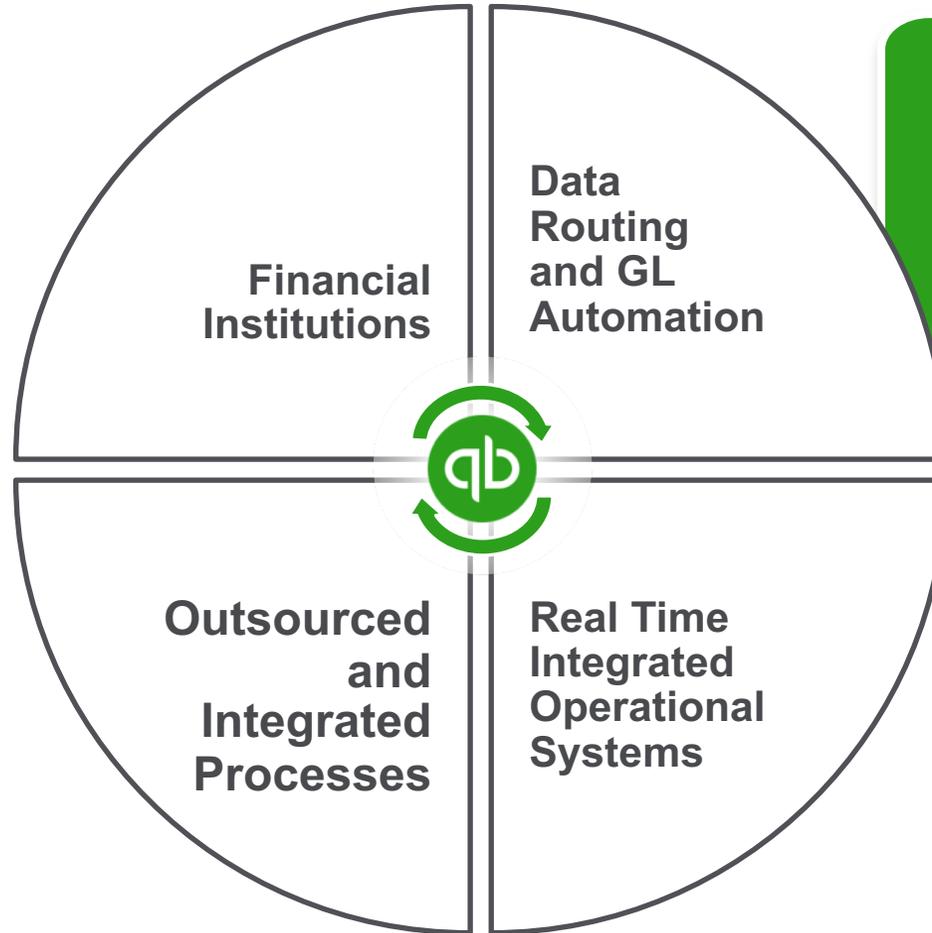
moneythumb.  
Boost your Productivity



Transaction  
Pro Importer

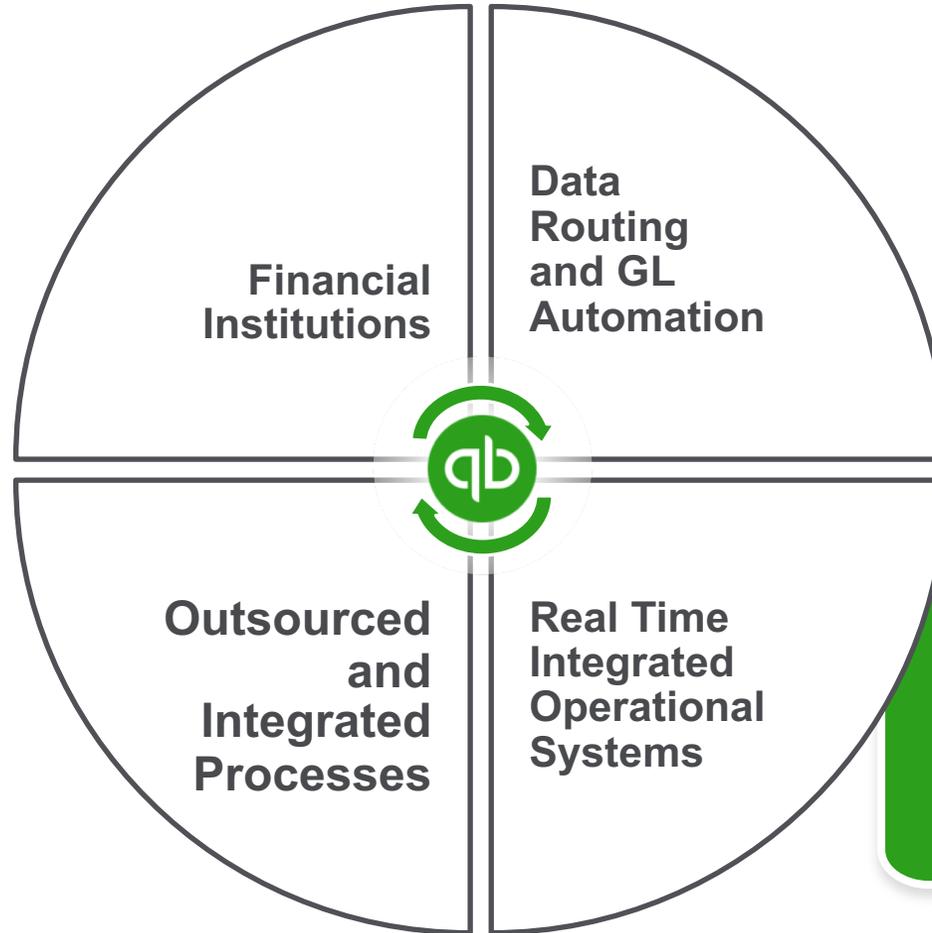


# APPify the Processes™ for client data



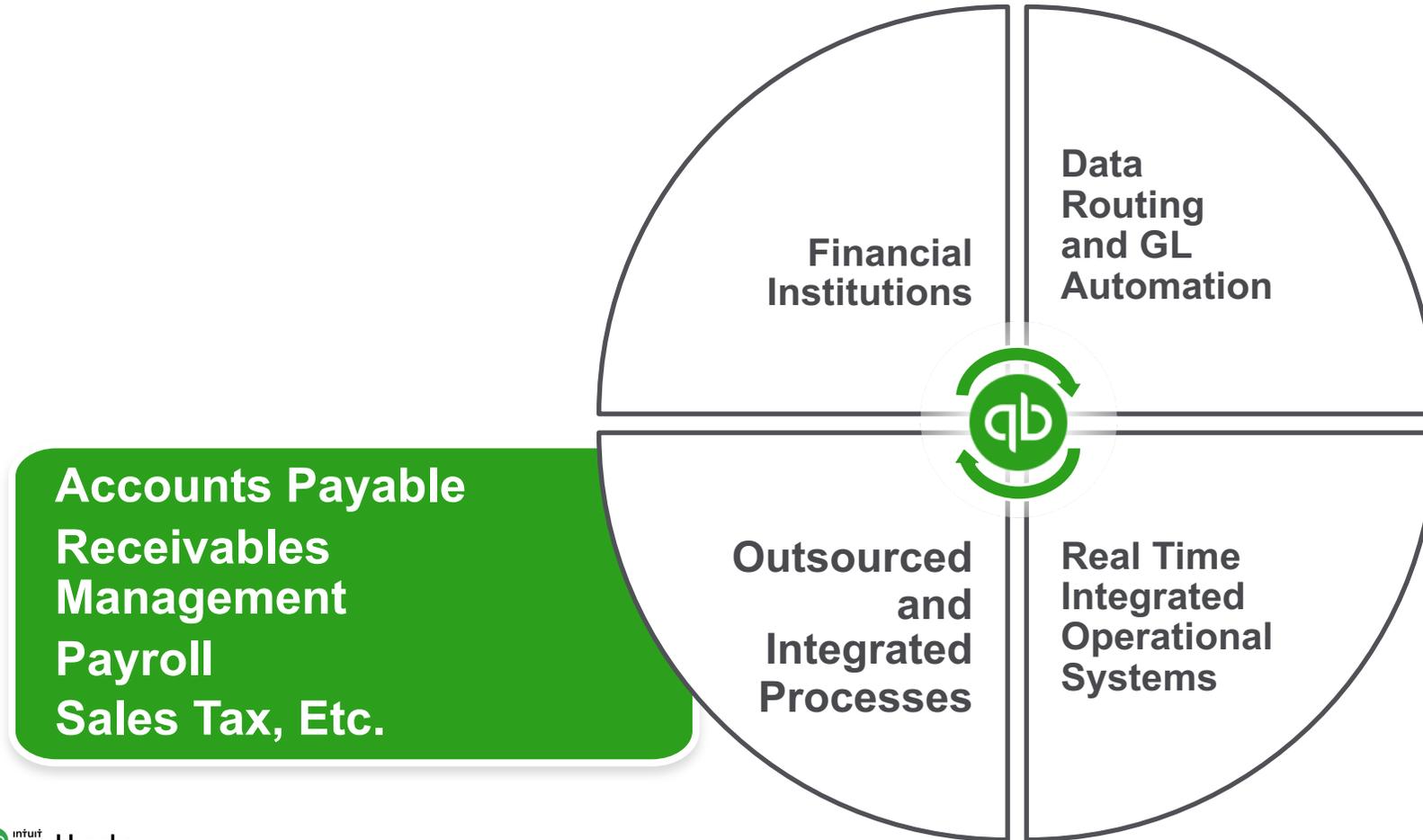
Document Fetching  
Expense Reporting  
Time Management

# APPify the Processes™ for client data



Point of Sale  
Warehouse  
Field Services  
E-Commerce, Etc.

# APPify the Processes™ for client data





# APPify the Processes™ for You

# APPify the Processes™ – Workflow and task management

Due dates

Task assignments

Procedures and checklists



qb Accountant | Go to client's QuickBooks | Search | + | Settings | Help | Notifications

**Adams Guild Gibson LLC**  
Thursday, October 3

Feedback? | Notifications | Manage templates | Create client request | **Create project**

YOUR PRACTICE

- Clients
- Team
- ProAdvisor
- Work**
- Apps

YOUR BOOKS

- Dashboard
- Banking
- Expenses
- Sales
- Projects
- Workers

All | Everyone | All types | From QuickBooks

**TODAY: 742**

- JUL 6** BEAUTIFUL LANDSCAPES 12  
Bank Rec  
Project : Monthly Accounting  
To do
- JUL 6** BEAUTIFUL LANDSCAPES 12  
Tie our A/R & A/P  
Project : Monthly Bookkeeping 12  
To do

**THIS WEEK: 26**

- OCT 4** BEAUTIFUL LANDSCAPES 12  
Work to be done  
To do
- OCT 4** FULL SERVICE PAYROLL  
Ensure client has enough cash in the bank  
Project : Weekly Payroll  
To do

**NEXT WEEK: 111**

- OCT 6** BEAUTIFUL LANDSCAPES 12  
Bank Rec  
Project : Monthly Accounting  
To do
- OCT 6** BEAUTIFUL LANDSCAPES 12  
Tie our A/R & A/P  
Project : Monthly Bookkeeping 12  
To do

**NEXT 30 DAYS: 144**

- OCT 13** MY FIRM  
Monthly Bookkeeping  
To do
- OCT 13** BEAUTIFUL LANDSCAPES 12  
Monthly Bookkeeping A  
To do

# APPify the Processes™ for you

Creating proposals

Customizing engagement letters

Onboarding clients

Client communication

CRM for client referrals and leads



# Related sessions



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# Questions?

# Thanks!

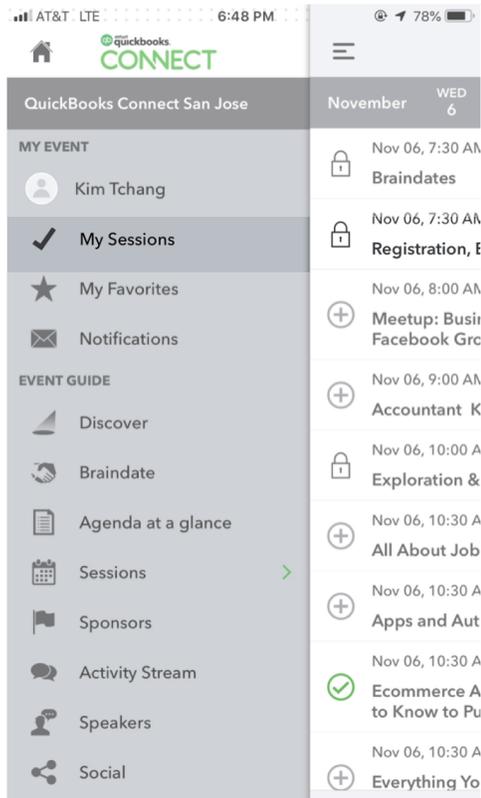
Connect / Follow me – links on my website: <http://longforsuccess.com>



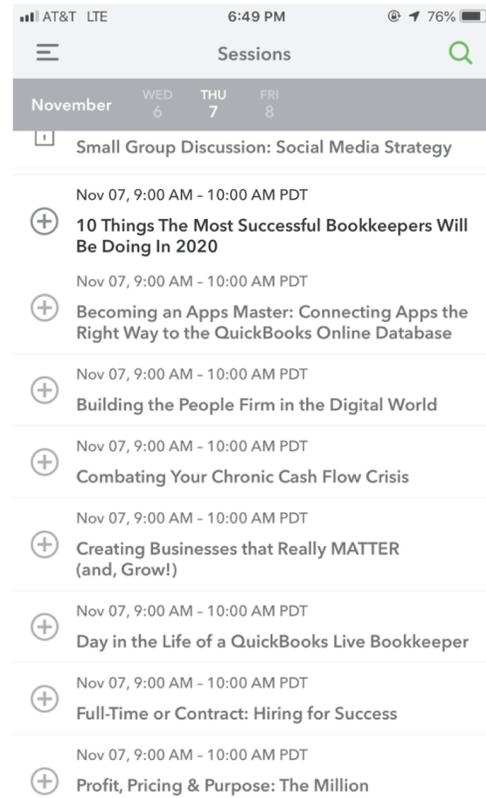
# Rate this Session on the QuickBooks Connect Mobile App

Provide feedback to help us design content for future events

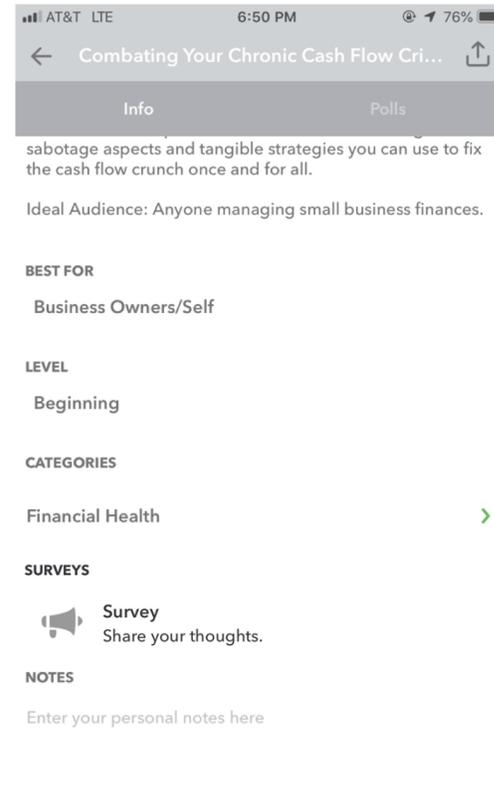
## 1. Select Sessions



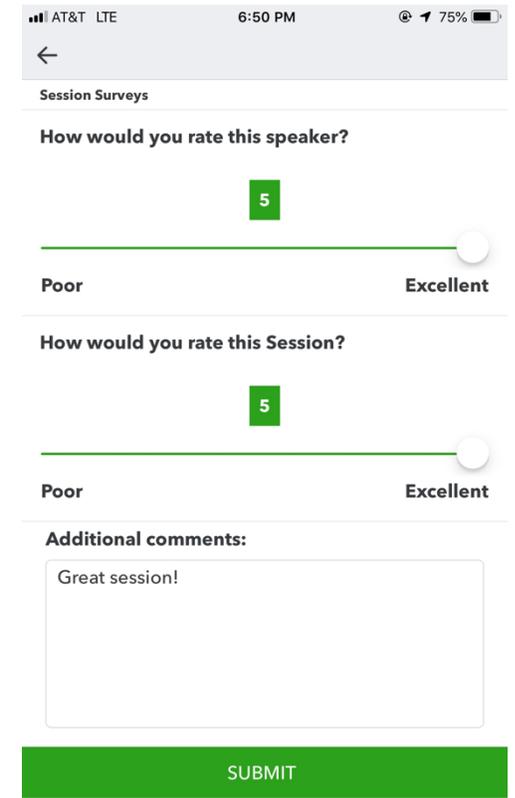
## 2. Select Session Title



## 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 the QuickBooks Connect logo and 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 underlined), 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'. An 'Expand all +' link is located to the right of the filters. The agenda items are listed in a table with columns for time and session details. The items are: '7:30-9:00 am Registration, Breakfast & Exploration'; '7:30-10:30 am Braindates' (with a description, 'Best for: All Audiences', and 'CPE Hours: not eligible'); '8:00-8:30 am Yoga'; and '8:00-8:45 am Breakout Sessions' (with sub-items: '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').

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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	x
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	+



OWN  
THE  
FUTURE  
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