Building your small business operations with QuickBooks

Mariette Martinez, EA

OWN THE FUTURE

About today's speaker

Mariette F. Martinez, EA
Small Business Advisor

Small Business Advisor at MarietteMartinez.com

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Co-founder, Bilingual Business & Financial Education Platform, TusTresMaestras.com

Intuit Trainer/Writer for QuickBooks, QBSE, QBOA ProConnectTax & Intuit Blog Contributor

Content Creator for Small Business Owners, Self-Employed and Accounting/Tax Pros


Take a minute
to connect with
your neighbor
#QBConnect | WiFi: QBConnect

Agenda

A small business operations story

What is a small business Technology Stack

QuickBooks as the CORE

Building out your QuickBooks Tech Stack

When you need more than QuickBooks

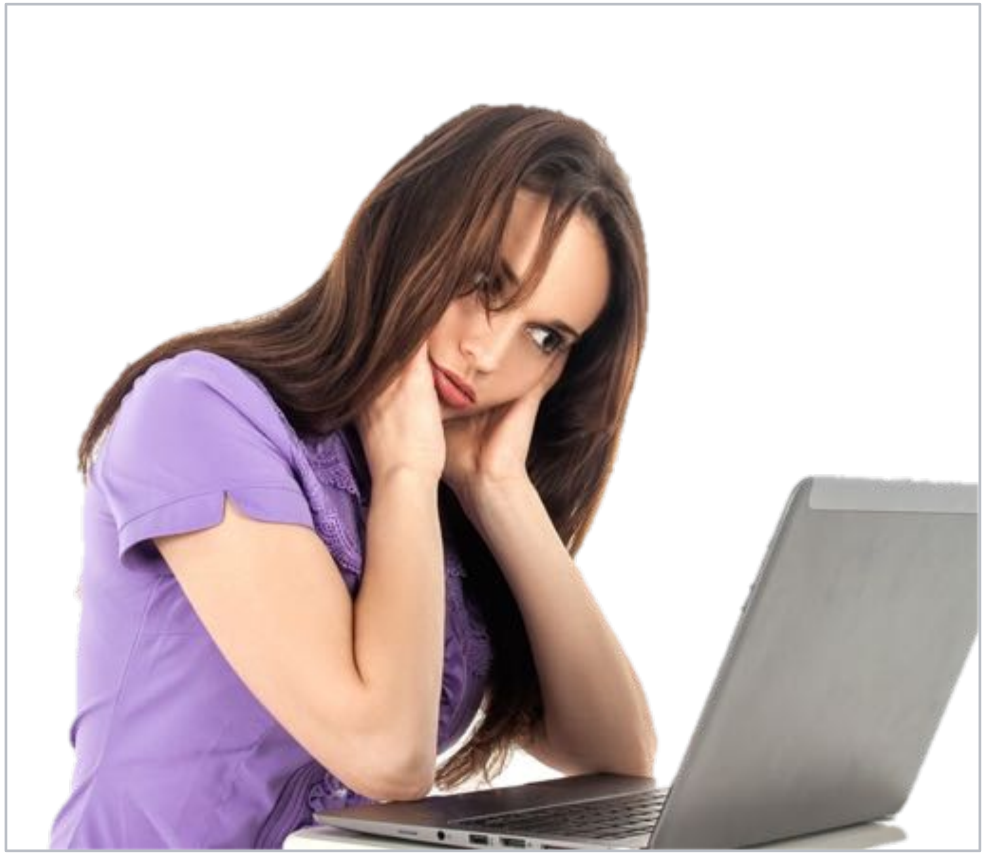
A Small Business Operations Story

Meet Maria from Maria's Designs Inc.

Her **Superpowers:**

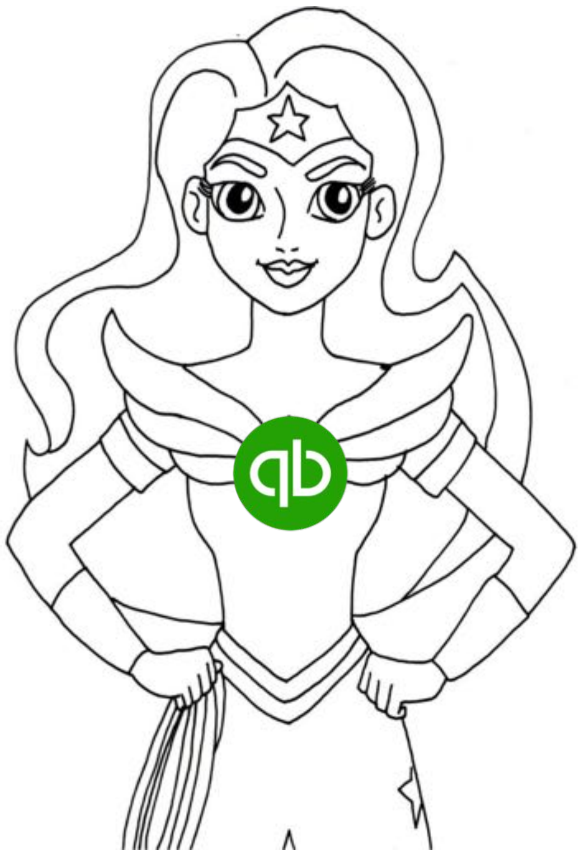
Graphic designer & planner extraordinaire

She's been doing some research on-line around **how to operate her growing small business** and now she is feeling…



Have No Fear!

Your QuickBooks Pro & Small Business Technologist is here!

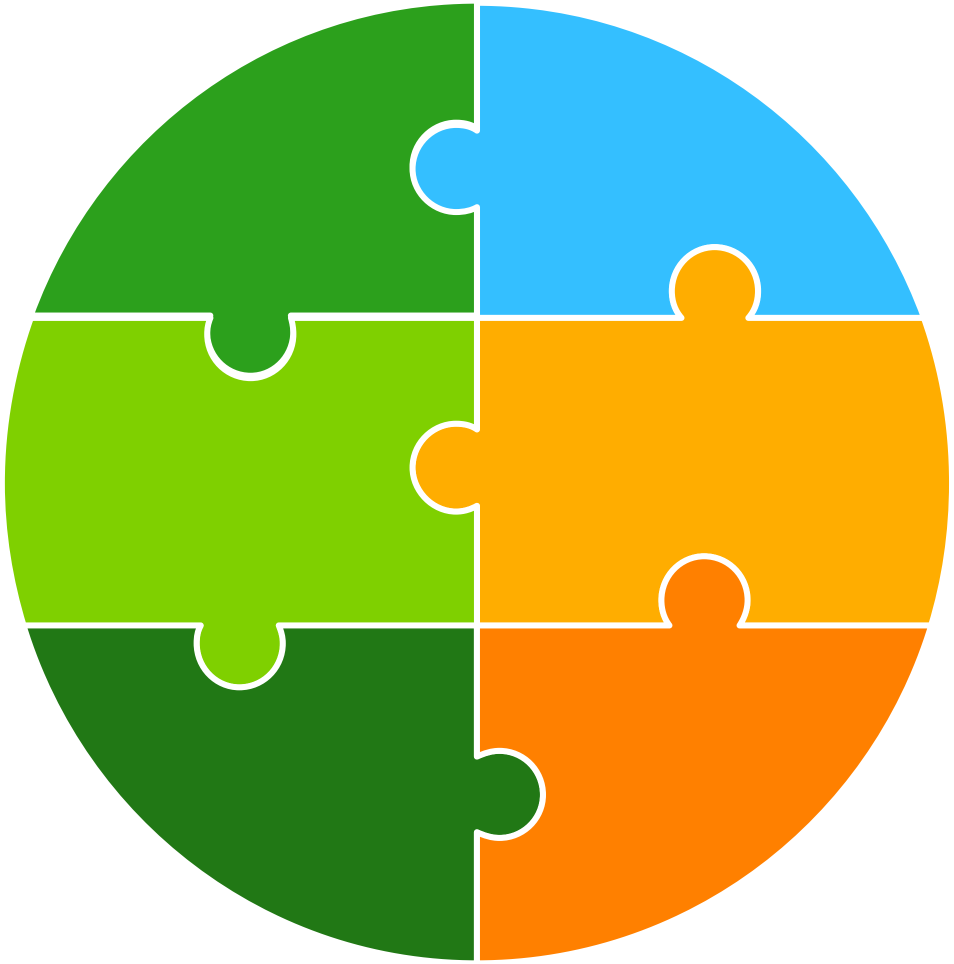


What is a Small Business Technology Stack?

A Small Business Technology Stack is

A set of software applications/ “apps” that has been designated as the business’s technology stack that can be leveraged to automate and improve operational transactions and back office tasks. This combination of “apps” should ideally optimize administrative productivity, save time and help the small business improve overall performance and profitability.

How to Build Your Small Business Technology Stack



One puzzle piece at a time

- Accounting/ Income & Expense Tracking
- Customer Management/ CRM tasks
- Time Tracking/ For Invoice & Job Costing
- Secure Document Storage/Receipt Capture
- Financial Reporting/ Money Management
- Payment Solutions/ Get Paid Faster

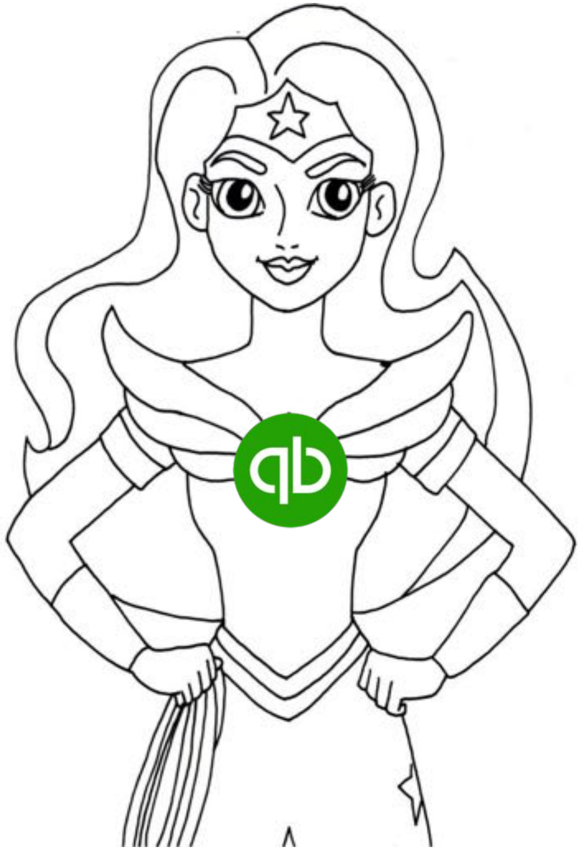
What does a Small Business Technology Stack look like?

Your Stack Evolves


ACCOUNTING TECHNOLOGY ECOSYSTEM 2019
ACCOUNTING SOFTWARE
BUSINESS INTELLIGENCE
CRM
PAYROLL
HR
HOSTING
ERP
WORKFLOW
BILL PAY
TIME TRACKING
INDUSTRY SOLUTIONS
DMS
PRACTICE MANAGEMENT
FUNDING
INVENTORY MGMT
TAX PREP SOFTWARE
FIELD SERVICE MGMT
ACCOUNTING ADD-ON
TAX TOOLS
EXPENSE MANAGEMENT
PROJECT MANAGEMENT

But Have No Fear!

Your Technology Stack Can Start with QuickBooks



QuickBooks as the CORE

QuickBooks is the CORE of the Accounting Operations System

AND includes features that provide CORE business functionality

For General Ledger:
Income, Expense & Profitability Tracking

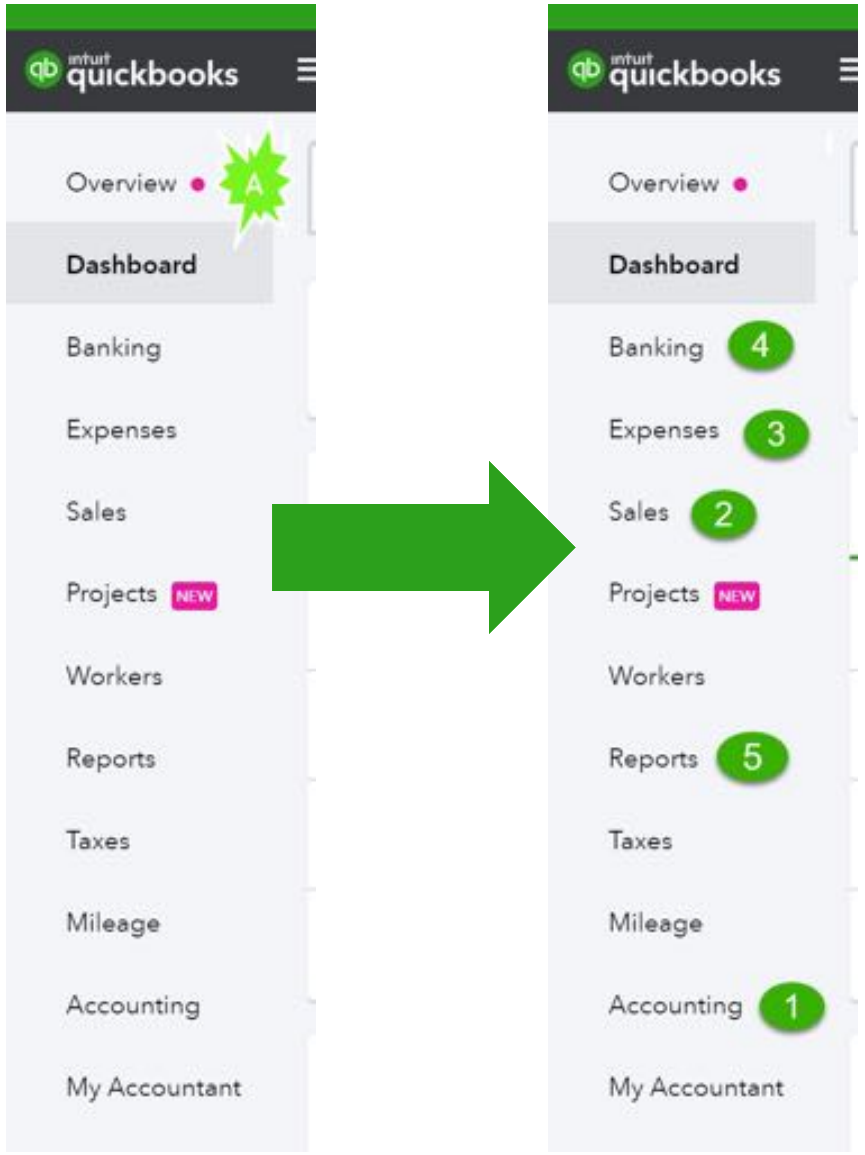
For Payments:
Get paid faster & mange cash flow

For CRM:
Sales, manage customer accounts & information

For Reporting:
Financial Statements, custom reporting & business compliance

For Time Tracking:
Assign time to client work for one & all

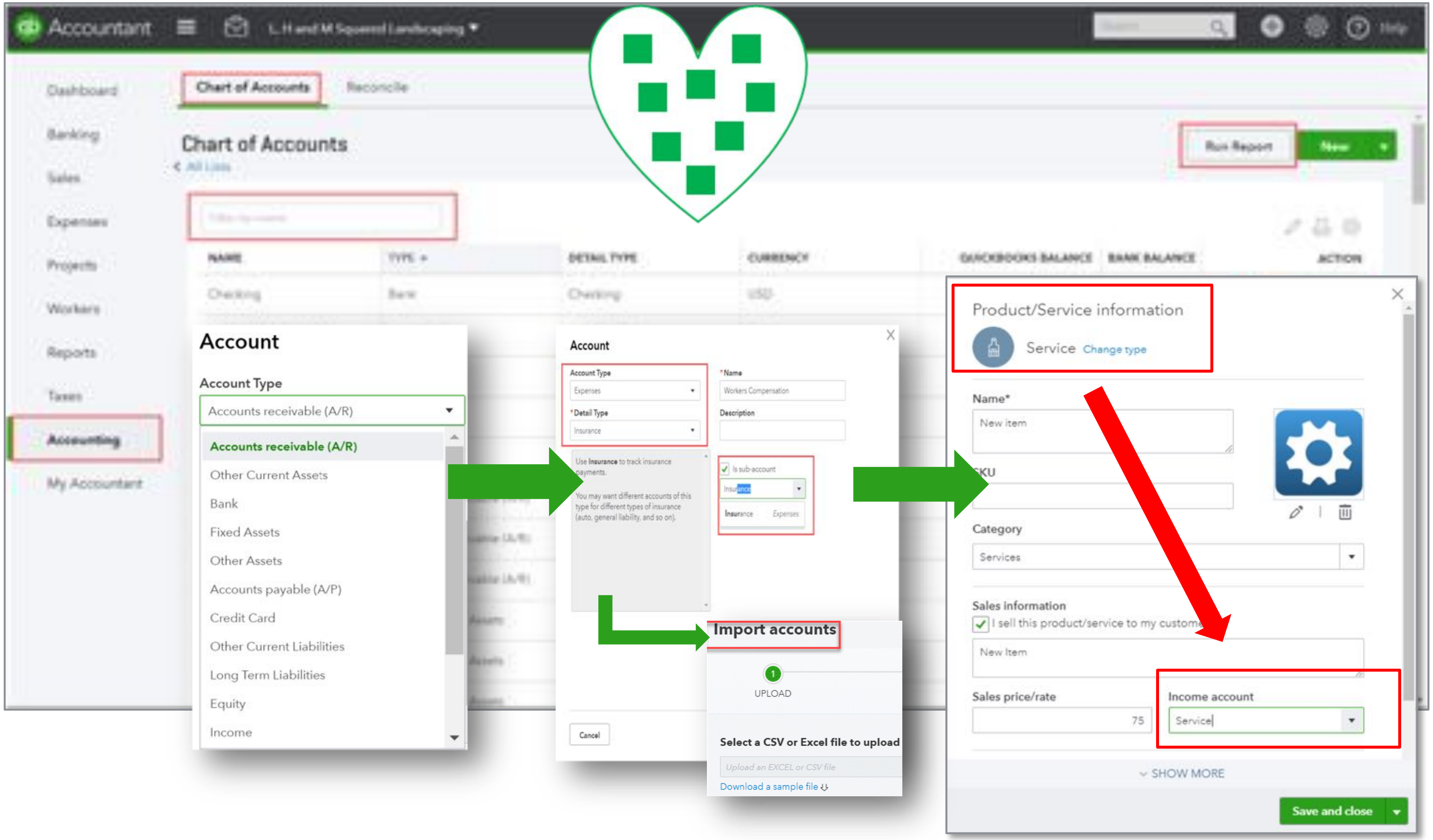
For Documents:
Capture receipts, attach statements & client collaboration



QuickBooks workflows that build out your Small Business Operations

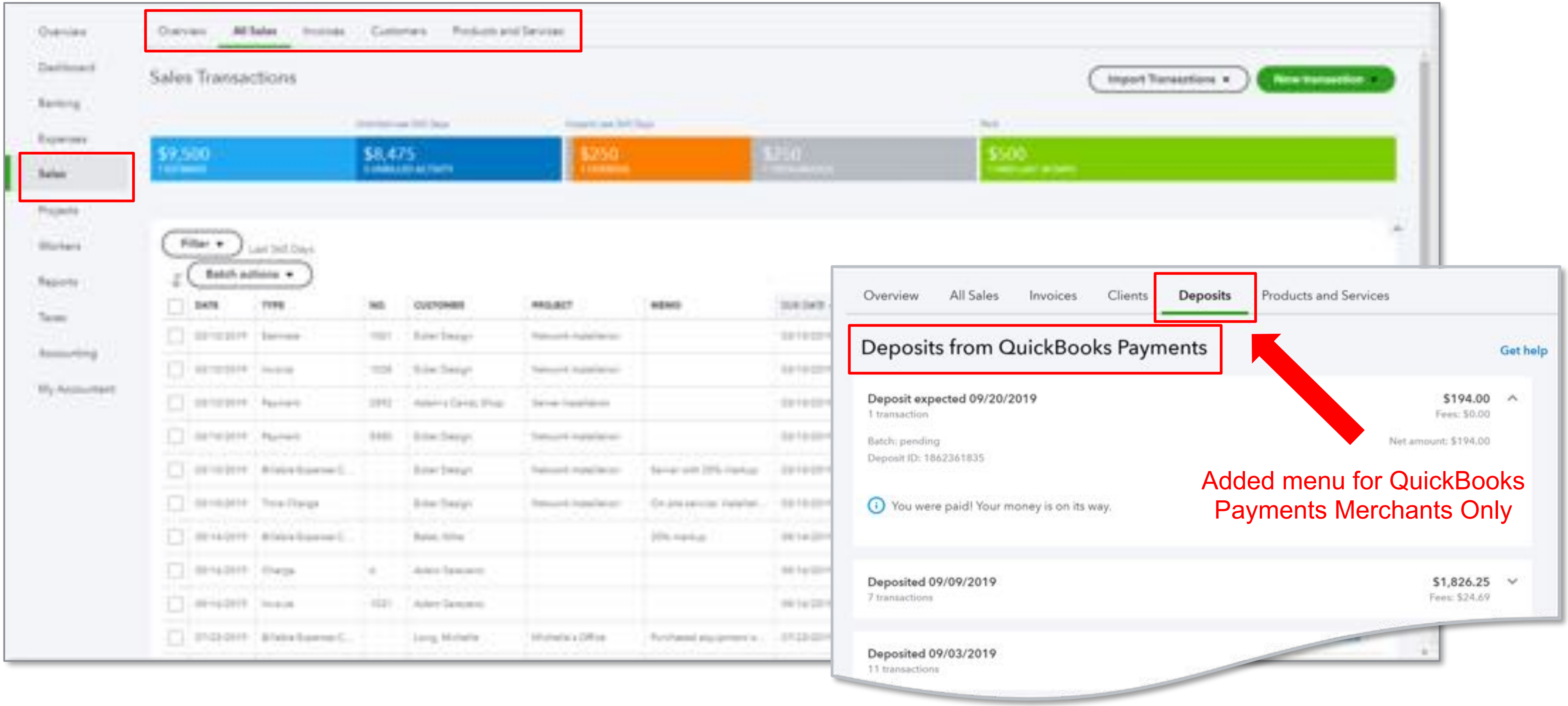
Where do you do **that** in QuickBooks?

#1 Accounting Center – Chart of Accounts "The Heart of the GL"



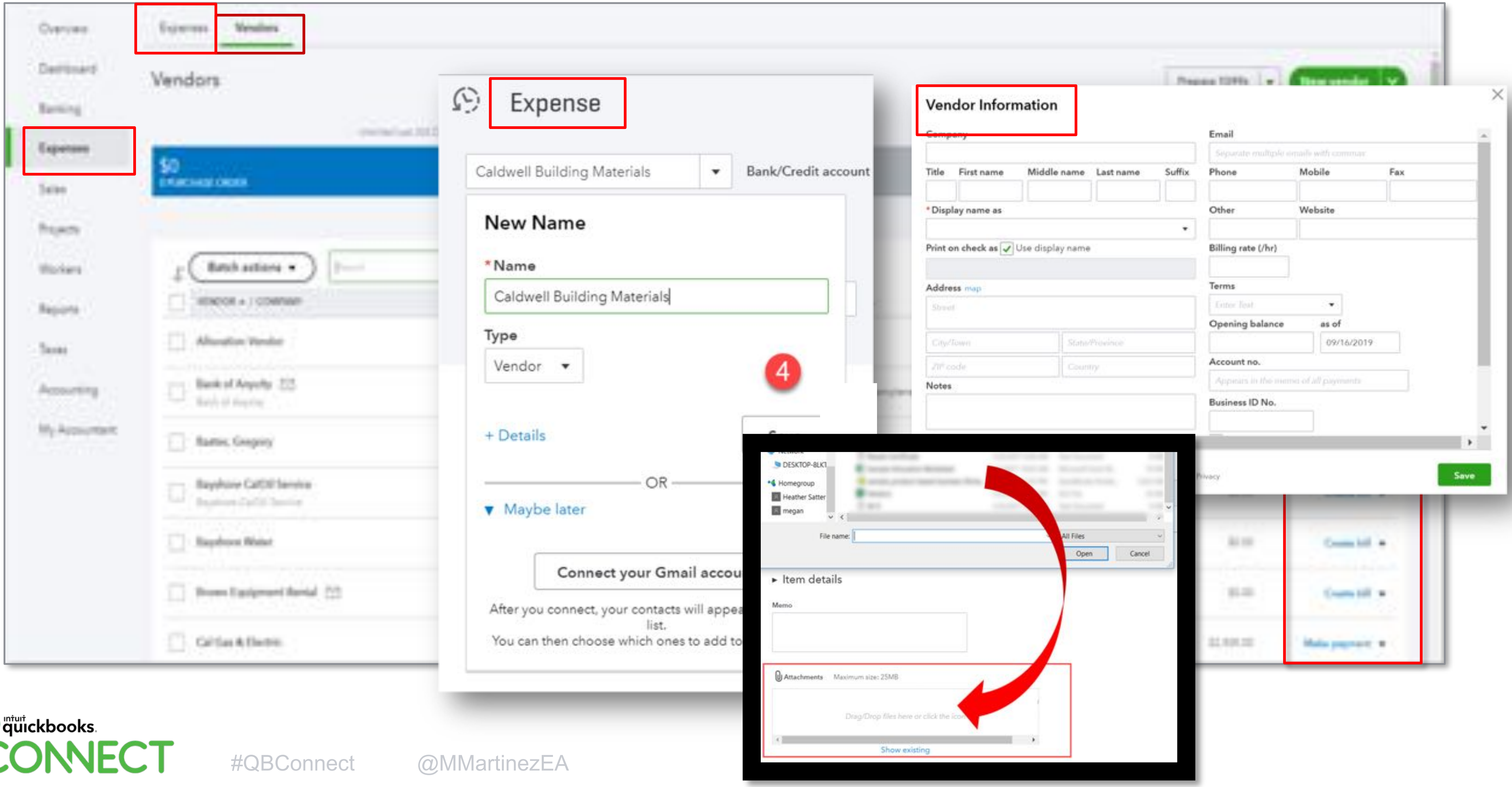
PRODUCT DEMO

#2 The Sales Center



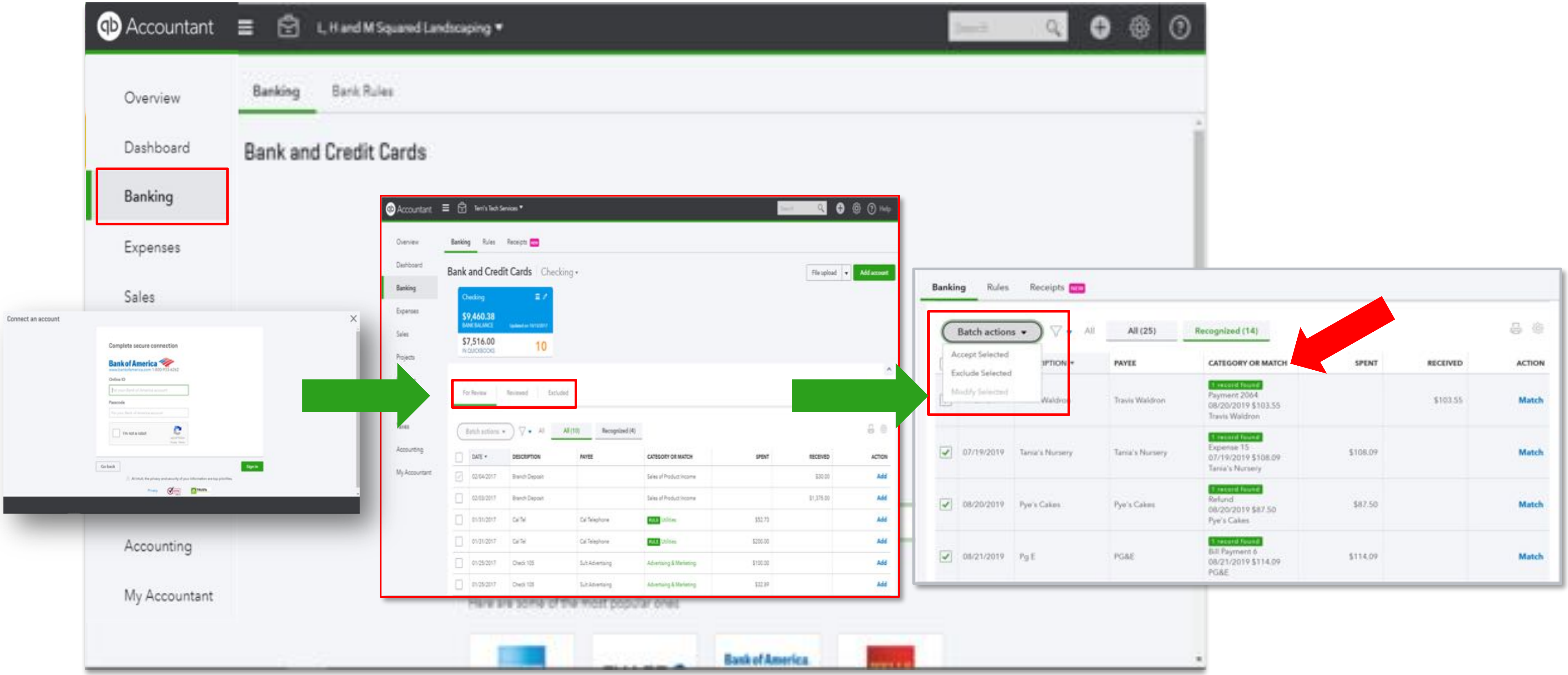
PRODUCT DEMO

#3 The Expense Center



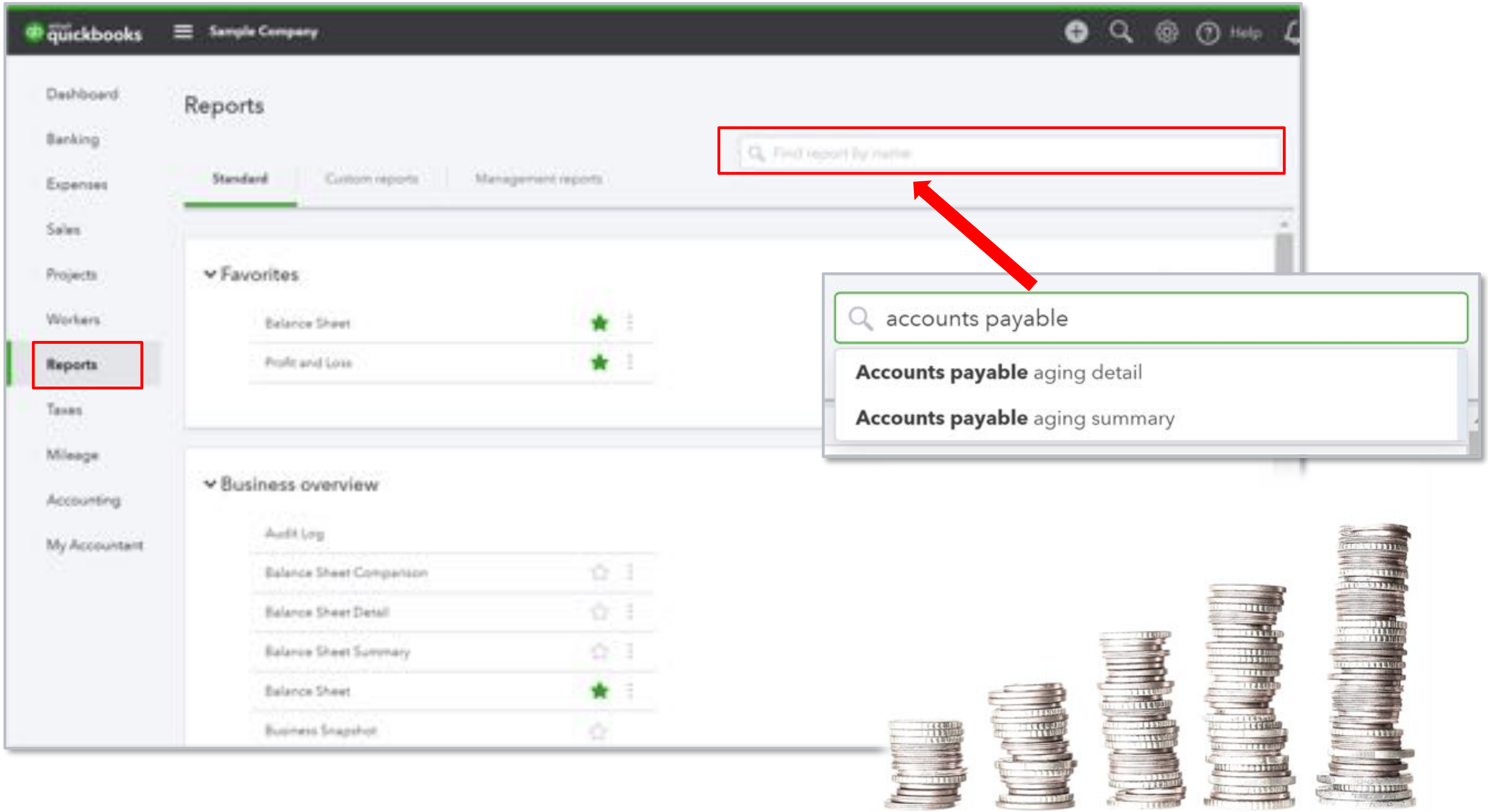
PRODUCT DEMO

#4 The Banking Center



PRODUCT DEMO

#5 The Reports Center



PRODUCT DEMO

Meet the Entire QuickBooks Online Family

Self-Employed

Best suited to service providers with **no A/R, A/P or Payroll.**

If you just need a **cash- accountability tool** then Self-Employed is ideal.

1 User
+ 1 Accounting Firm

***Not QBO**

Simple Start

Great for new **service-based businesses** just starting out.

If you need **A/R, Payroll, sales taxes** and/or simple financial reporting, Simple Start is ideal.

1 User +
2 Accounting Firms

Essentials

Perfect for **service-based businesses** who **invoice for time.**

If you need **A/R, A/P, Payroll, sales taxes** and/or more financial reporting, Essentials is ideal.

3 Users
+ 2 Accounting Firms

Plus

Ideal for **product-based businesses that track inventory** and/or requiring **advanced reporting and profitability tracking.**

5 Users
+ 2 Accounting Firms

Advanced

Great for growing businesses who need **more productivity and insights**. The subscription includes **advanced functionality, unlimited lists and premium care.**

Up to 25 Users +
3 Accounting Firms

More Small Business Features by QuickBooks subscription level

Self-Employed
Separate Business from Personal Spending Sync Bank Accounts Mileage Tracker Simple Invoices Estimated Tax Projector Receipt Capture Maximize Schedule C Deductions

Simple Start	Essentials	Plus	Advanced
Create estimates & invoices Track income & expenses Sync bank accounts & apps Works on PC, Mac & mobile Can add accept payments Mileage Tracker	Get all **Simple Start** features Delayed Charges Manage vendor bills (A/P) Handle foreign currencies Recurring transactions Time-tracking	Get all **Essentials** features Prepare budgets Create purchase orders FIFO inventory Location and Class tracking Reports Only users	Get all **Plus** features Pay bills Smart reporting powered by Fathom Accelerated invoicing Custom user permissions Premium care with Priority Circle

Building Out Your QuickBooks Tech Stack

Now, It’s Your Turn!

QuickBooks as the CORE of Your Small Business Operations

For General Ledger:

For Payments:

For CRM:

For Reporting:

For Time Tracking:

For Documents:

Today’s workshop format

FIRST:
Break into 3 groups, build out a Small Business Tech Stack diagram that **starts with QuickBooks**

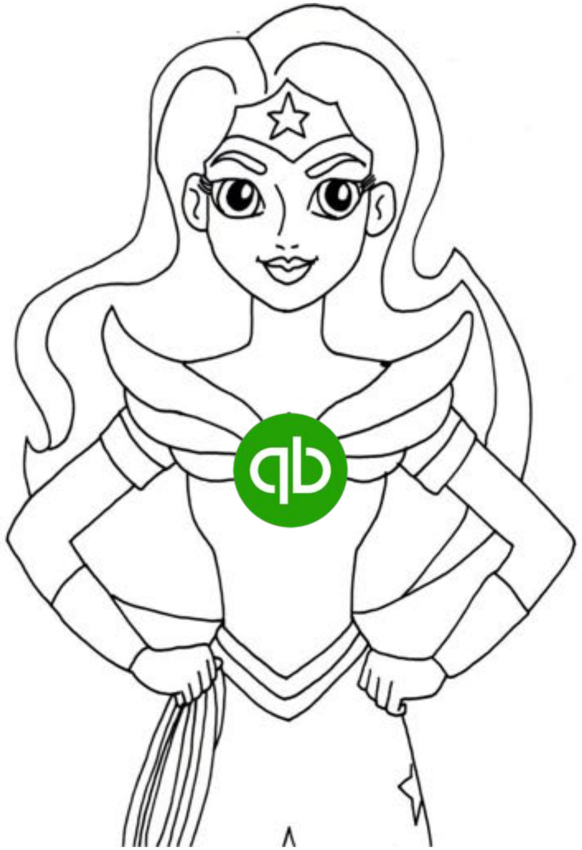
1. Choose a real business model from within the group or create one (industry needs, tech needs, scalability)
2. Take note of the additional operational needs that are not being met by QuickBooks and will need more apps
2. Decide which observer(s) will be note-taking on tech stack discovery
3. When time is up, decide which team player will share for the team

SECOND:
Use the QuickBooks Small Business Diagram to build out your own tech stack. Be ready to share =)

THIRD: Ask any final questions about building your Small Business tech stack before we wrap it up!

When you need more than QuickBooks

So you know you need **MORE** than QuickBooks, how do you choose the best apps to build your tech stack?



Building out FROM QuickBooks when you need MORE

Add more apps specific to unique operational needs

- Security/Separation of Duties
- Industry-specific functionality
- Robust Analytics and Reporting
- Streamline Communication
- Automate Data Entry/"Fetching"
- Client Work/Task Management Integrations

Office Suite

Mobile Suite

Top of funnel	Contact & Lifecycle Mgmt, Social, Email, Automation	Creative & Content	Intelligence & Analysis	Collaboration & Productivity
LinkedIn		Canva	Google Analytics	Google apps
twitter	HubSpot CRM	Zerys	Google Search Console	Trello
Google+	hootsuite	Lucidchart	MOZ	slack
facebook	Signals	UXPin	Content Insight	skype
YouTube	IFTTT	Ai	HubSpot	toggl
Quora	zapier	Ps	woorank	Dropbox
slideshare	TweetChat		grader	
buffer			SurveyMonkey	
start A FIRE			SocialBro	
SumoMe				
DISQUS				
Grasshopper				
Google AdWords				

Final thoughts or questions?

Own your future – Next steps

- Start the Tech Stack process no later then 1 week after QBConnect
- Select 3 areas of SMB Operations to enhance **with QuickBooks**
- Select 1-3 areas of SMB Operations to enhance **outside of QuickBooks**
- Attend and/or engage with 1-3 learning resources related to these apps
- Set target dates to when applications must be fully implemented
- Schedule “calendar” meetings with responsible parties for accountability
- Own the Future and it starts NOW!

“

Technologies are invented to make our lives easier, not our choices.

-Adam Jensen

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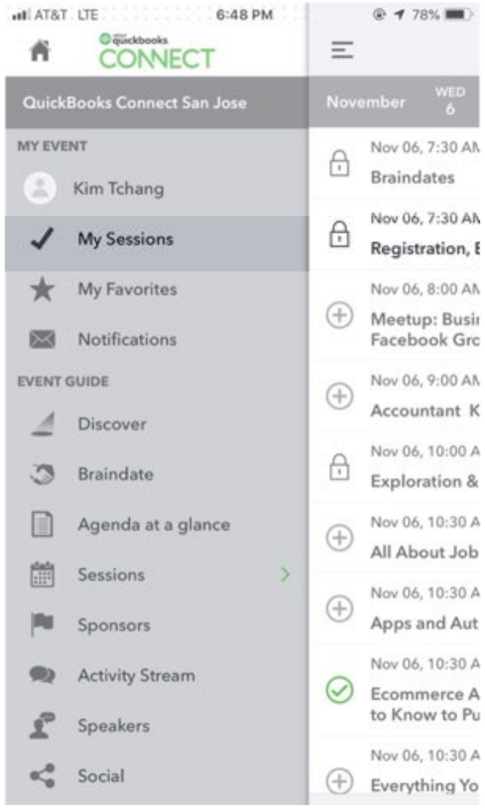
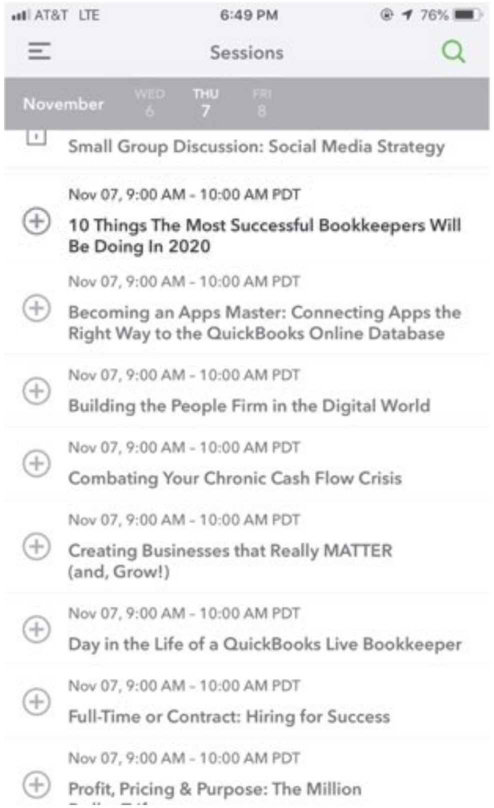


2. Select **Session Title**



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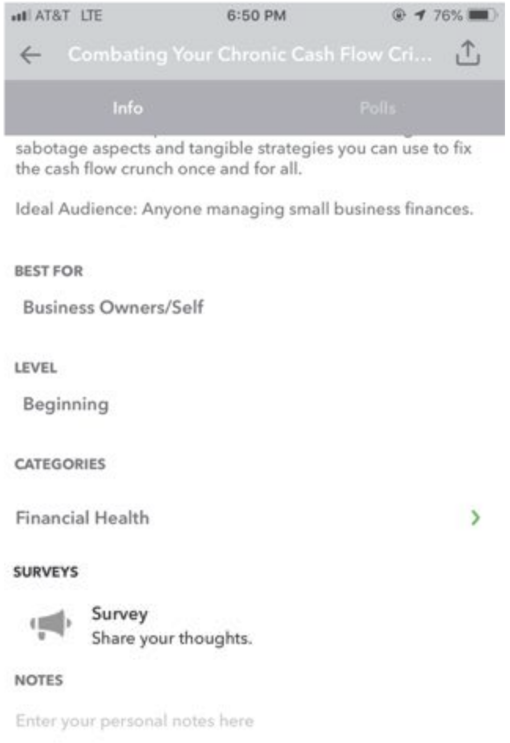
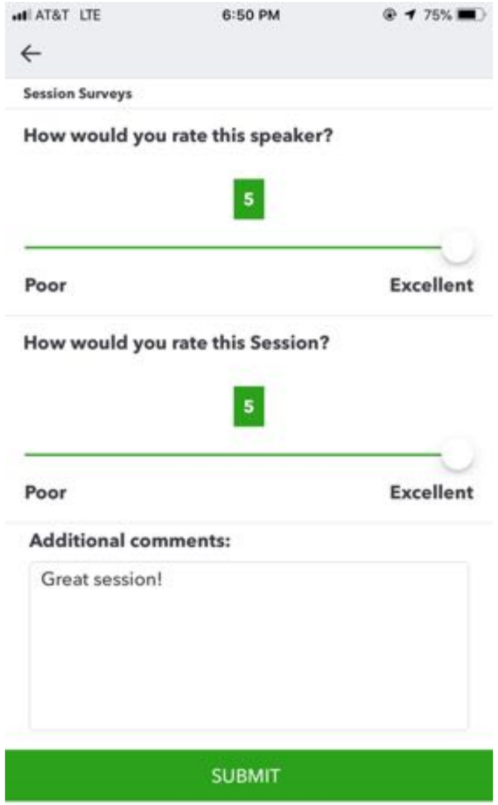


4. Add **Ratings**



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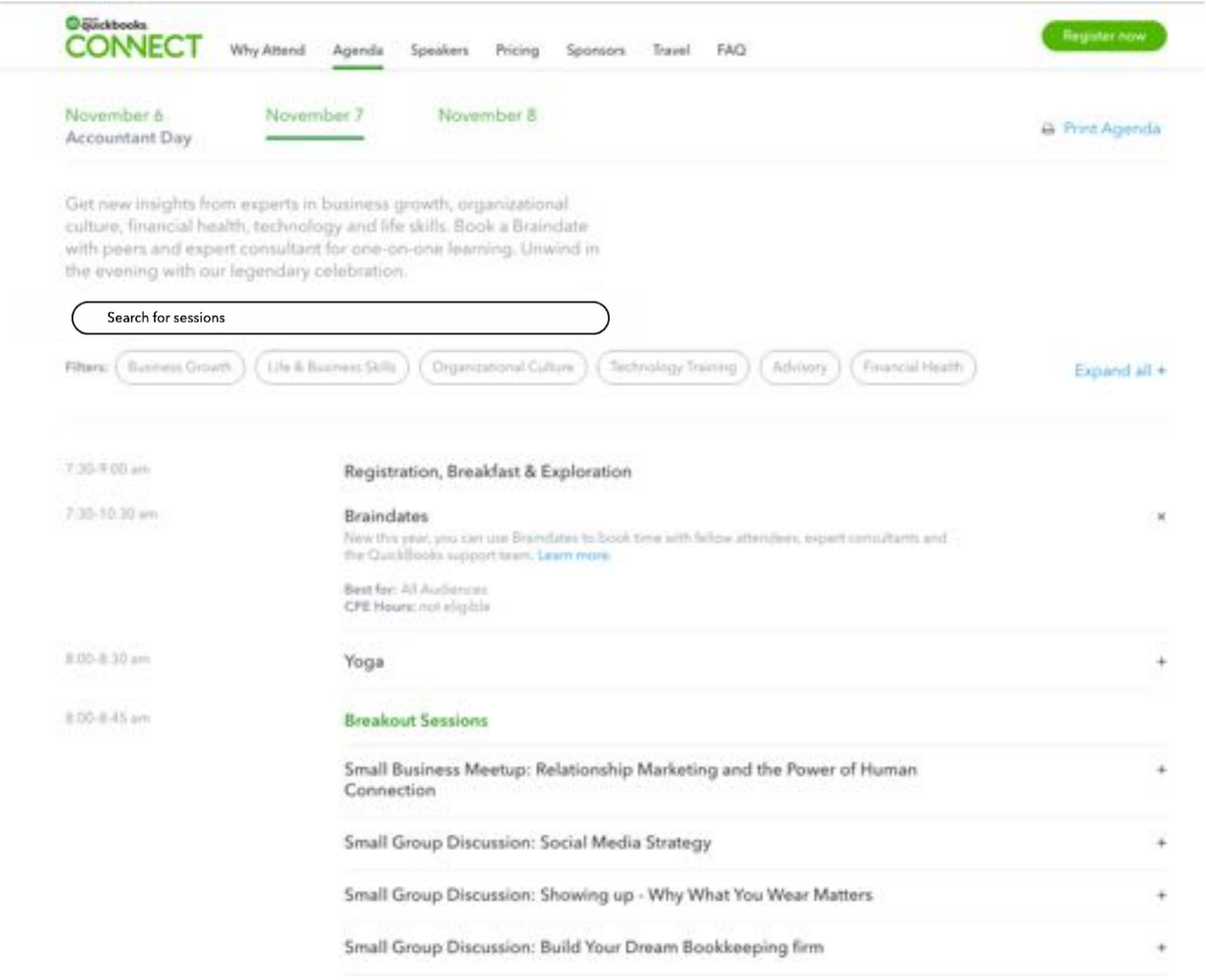

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