



# Connecting the dots for your construction clients: Beyond mere number crunching

Tonya Schulte



# 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

# Today's speaker



Tonya Schulte  
Construction Profitability Specialist  
@schultetonya

# Agenda

What services do they need?

Can we fill the need today?

How can we fill the need tomorrow?

One thing to do on the plane.

Two things to do back home.



# What services do they need?



# Other demands on your clients time

What other things are coming at them all the time?



What are other Pros (CPA, Bonding Agent, Loan Officer, Insurance Agent) asking of them?

What are their subs asking of them?

What are their GCs asking of them?



**Question everything.”**

Albert Einstein



# How to ask better questions

## 4 Valuable Tools in Your Question Asking Toolbelt

Harvard Business School research

<http://bit.ly/2nWJ2s4>

Shore it up with The Proper Sequence

Dig deep with Open-Ended Questions

Hammer away with Follow-Up Questions

Level it all with The Right Tone

YOU WON'T KNOW IF YOU DON'T ASK.



A photograph of two young women with blonde hair in ponytails, seen from the side and slightly from behind. They are looking towards the right. The woman in the foreground is wearing a dark jacket with a light-colored fur collar. The background is dark and out of focus, with some green foliage visible. The text "Let's Work Together: Needs List Ideas" is overlaid in white on the right side of the image.

# Let's Work Together: Needs List Ideas

#QBConnect | WiFi: QBConnect

# What will you ask?

## Questions to ask:

1. Who is your (fill in the blank - CPA, Bonding Agent, Loan Officer, Insurance Agent)? (Bonus: Go ask questions of these guys! More on this later.)
2. Are there documents that you have been asked to provide by those pros?
3. What docs do your GCs need?
4. What docs do your subs need?



# Can we fill the need today?



# Current resources

How can we draw on current firm resources?

## Experience

Construction Specific  
Accounting Related  
Insurance Related  
Contract Related  
Bonding Related  
Finance Related

## Education

School  
Special Classes  
Webinars / Seminars  
Certificate Programs

## Resources

Apps  
Networking Partners  
Self  
Staff  
Other Resources

CAPITALIZE ON YOUR CURRENT STRENGTHS

# Skills/knowledge assessment


What do we know, what experience do we have?

Industry knowledge / experience	Self	Employee/Sub	Partner	App Partner	Other
Construction specific accounting knowledge / experience					
Construction administration knowledge / experience					
Construction regulation knowledge / experience					
Applicable skills from other sectors					

# Skills/knowledge assessment

What do we know, what experience do we have?

Technical skills / experience	Self	Employee/Sub	Partner	App Partner	Other
Accounting / Finance / Cash Flow Projections					
Legal					
Marketing / Public Relations					
IT / Hardware Mgmt / Software Mgmt					
Risk Management / OSHA / Safety					
Human Resources Management					
CEO / Senior Management Experience					

A photograph of two young women with blonde hair in ponytails, looking towards the right. They are in a crowd, with other people blurred in the background. The lighting is soft, and the overall tone is warm and collaborative.

# Let's Work Together: Skills Assessment

#QBConnect | WiFi: QBConnect



**Start the skills/needs  
assessment for you  
and your firm**







How could we fill the  
need tomorrow?



**You learn something every day if you  
pay attention.”**

Ray LeBlond



# Ongoing education

School

Special classes

Webinars / seminars

Certificate programs



# New hires

Former co-workers and associates

Networking contacts

Local colleges

LinkedIn

Facebook groups

Ask your clients



# Apps/process design

Is there an app for that?

Can we build a process for that?



### Job Setup Checklist Example

10

Job #	Tax Type	Job Name	Job Address	County	Bid #	Start Date	Est End Date	General Contractor
1098	Not Taxable	Big Giant Building	1234 N 1st Street	Maricopa	787777	09/25/19	04/03/20	Big Giant Building Construct
1099	Taxable	Little Itty Bitty Building	0987 S 100th Ave	Maricopa	787476	10/01/19	11/01/19	The Teeny Tiny Guys

# Forging cooperative networking partnerships

Events like this


Social Media

Networking in the construction industry

- Other Accountants, ProAdvisors, CPAs
- Other Pros  
(Bonding Agents, Lawyers, etc.)
- Other Construction Consultants
- Your CLIENTS!







# Let's Work Together: Future Skills/Resources Assessment

#QBConnect | WiFi: QBConnect



# Now what?

Ask better questions

Add more value today

Add more value tomorrow

One thing to do on the plane

Two things to do back home

**Set up coffee dates**



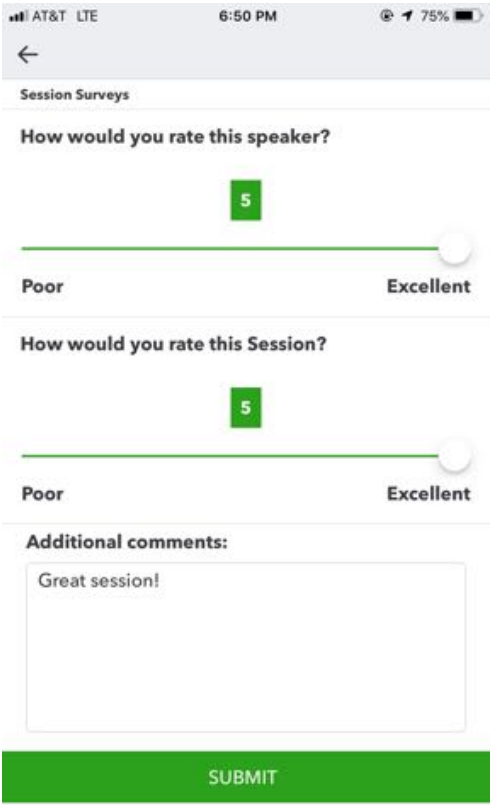
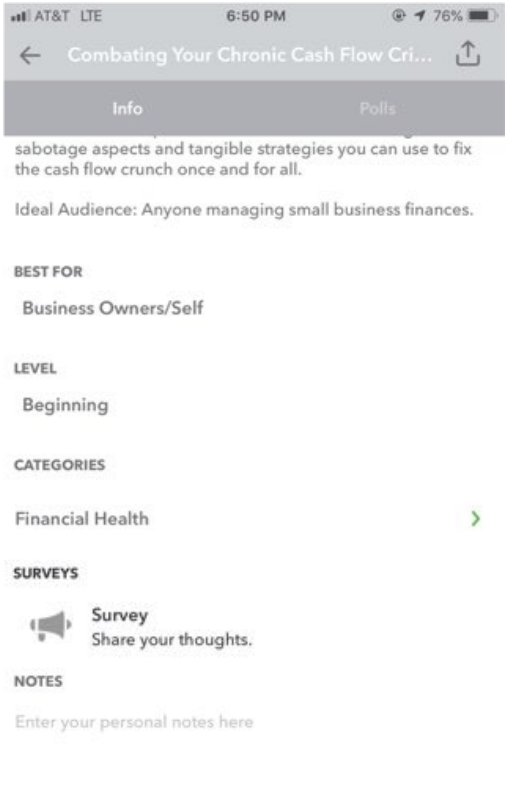
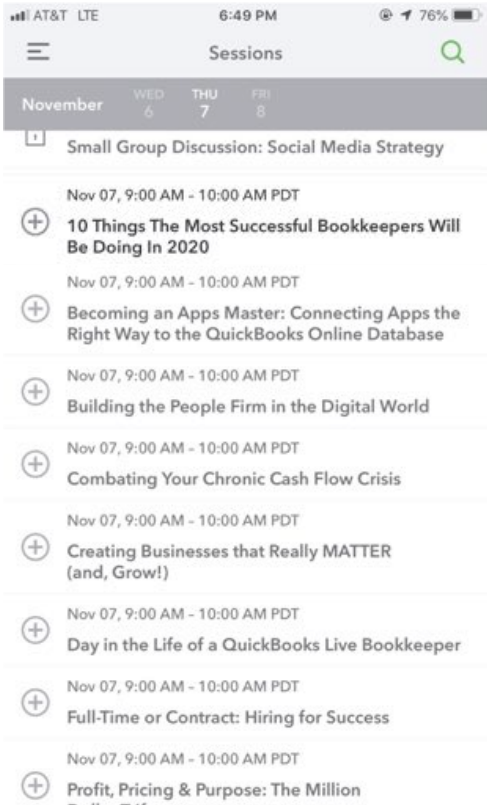
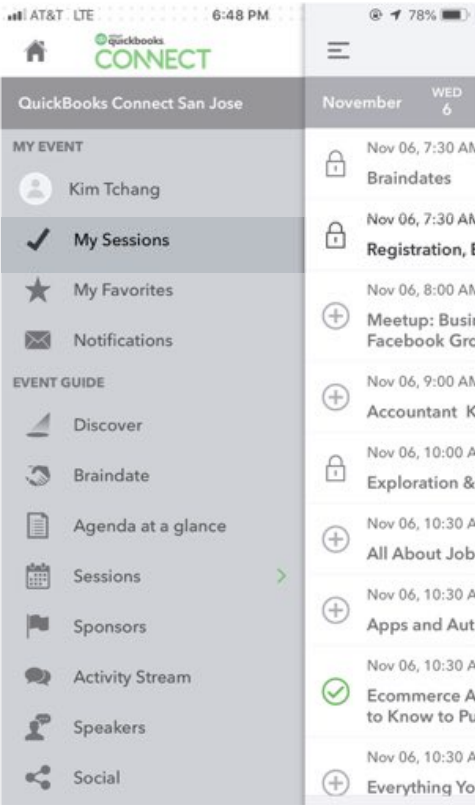


# Questions?

# 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 header includes the QuickBooks Connect logo, navigation links (Why Attend, Agenda, Speakers, Pricing, Sponsors, Travel, FAQ), and a Register Now button. The agenda is organized by date, with November 7 selected. A search bar and filter tabs (Business Growth, Life & Business Skills, Organizational Culture, Technology Training, Advisory, Financial Health) are present. The agenda items for November 7 are:

- 7:30-7:00 am: Registration, Breakfast & Exploration
- 7:30-10:30 am: Braindates (New this year, you can use Braindates to book time with fellow attendees, expert consultants and the QuickBooks support team. Learn more. Best for: All Audiences. CPE Hours: not eligible)
- 8:00-8:30 am: Yoga
- 8:00-8:45 am: Breakout 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
  - Small Group Discussion: Build Your Dream Bookkeeping firm



OWN  
THE  
FUTURE