



Our guide to cloud accounting

Framing the conversation

A large, abstract graphic in the bottom right corner consisting of overlapping, rounded shapes in various shades of green, creating a modern, layered effect.





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Welcome to the Cloud ProAdvisor Program

Welcome ProAdvisor,

Many of our partners tell us that they find it difficult to know where to start the conversation and educate their clients on cloud accounting. As a result, Intuit has designed this guide to help you do just that.

The good news is that you don't have to be a cloud expert to talk about the benefits of switching to a cloud accounting solution. This document is designed to make it easy for you.

The guide can help you explain what cloud accounting is, its benefits, as well as provide tips on how to start the conversation with your clients about moving to the cloud.

If you have any questions, call us at **1-855-348-9676**.

We look forward to hearing your feedback!



Chris Fudge

Business Unit Leader - Accountants
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What is cloud/online accounting?

Defining what working in the cloud is can prove to be complicated, as different people have different explanations.

Technically, working in the cloud refers to the delivery of IT infrastructure, applications, and services to organizations and end users, on an on-demand basis, remotely, via the internet.

In layman's terms, the cloud is simply a platform to make data and software accessible online anytime, anywhere, from any device. You are simply working online via a platform to share data and information.






Helping clients understand the cloud

Using analogies

When attempting to convince your clients to switch to an online accounting solution, it's important for the client be able to grasp the idea you're attempting to communicate.

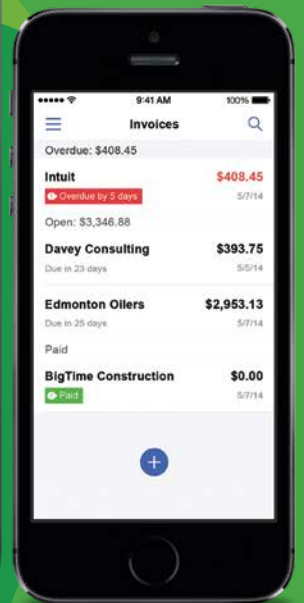
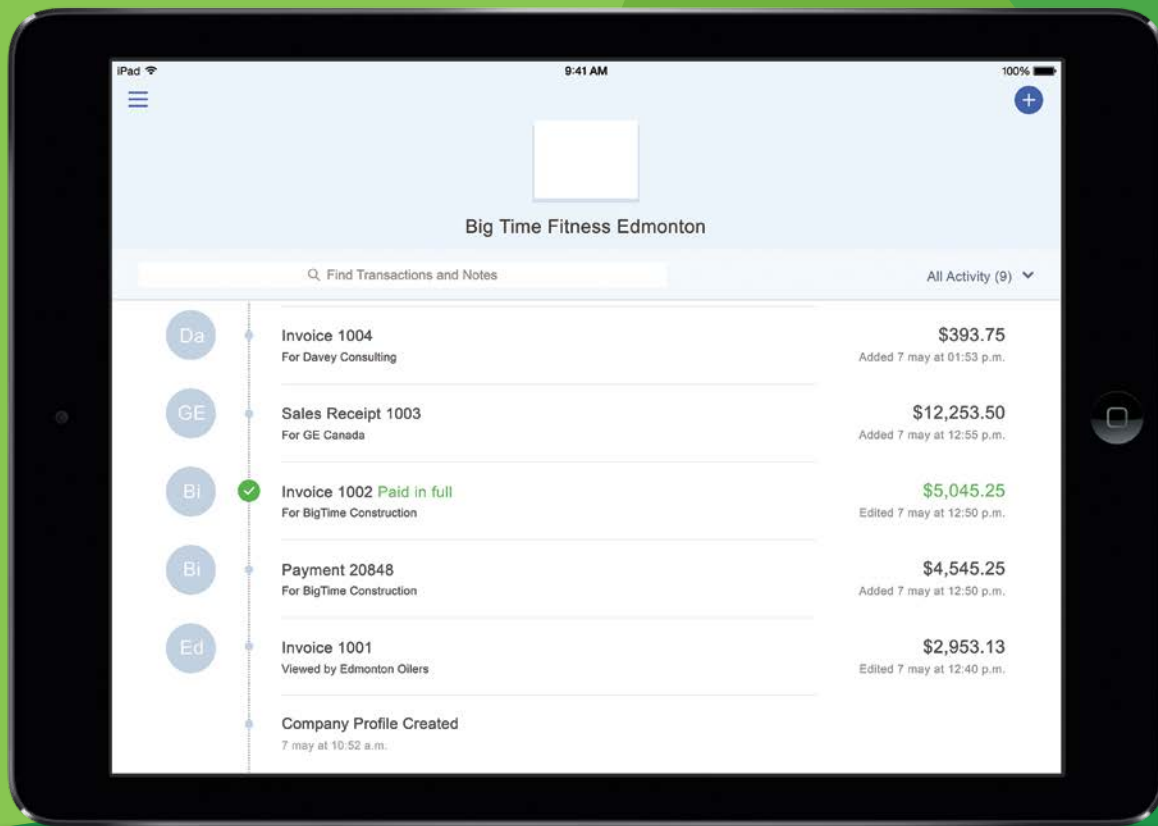
While cloud accounting isn't terribly complex, relating it to a familiar product or service can make the process much smoother and improve your conversation.

Below you will find a few cloud accounting analogies to help your clients quickly grasp the concept and the benefits that cloud accounting offers:

-  **Traditional banking vs online banking**
-  **Postage vs email, such as Gmail accounts**
-  **Bookcases for storing books or CDs vs cloud storage, i.e.: Apple iTunes**

As you can see from the above, many small businesses often use cloud services without even knowing it!





Benefits of cloud accounting

When you and your client work online, you will both have access to everything the cloud has to offer, along with all the benefits that come with it, including:

Go mobile

Create a quote, email an invoice, and record an expense – anytime, anywhere. Using just an internet connection and a browser, colleagues on different continents and in different time zones can work together on the same project.

Real-time collaboration

Collaborate in real time with clients and team members to speed up the rate of work and make smarter and faster decisions. Plus, cloud computing saves time on file sharing.

Always backed up and secure

Perhaps the most significant aspect of cloud accounting is the assurance that your clients' company data is always secure and always backed up.

Reduced capital expenditure

System upgrades are a thing of the past! In the cloud, software automatically upgrades so your clients are always up-to-date and using the newest version.

Improved agility & productivity

Cloud technology will allow your clients to spend more time on their business and less time dealing with administration and data entry.



Framing the conversation

Planting the seed

If you have clients using desktop software, it's more than likely a few well-known 'pain' points will arise. You'll be surprised with how naturally the conversation will flow, particularly at the end of the financial year.

Here are a few client scenarios we experienced recently, which quickly became QuickBooks Online transitions:

"I've lost my data and now I have to re-create everything. I wish I remembered to back up!"

"Can you process this shoebox of receipts for me?"

"Which company file do I send again?"

"I'm on the road a lot more these days and can't get onto my invoices and bills as much as I'd like."

"I have remote employees and can't get all of the data I need from them to complete payroll quickly."

"My compliance fee is too high. How can I better control costs while getting more of your advice?"



Useful prompting questions:

- Q** Would you like your cash flow and business financial position to be more visible?
- Q** Are you confident that you have good insight into your business risks and opportunities as they arise?
- Q** Are you spending a lot of time on manual data entry?
- Q** Do you find yourself frequently chasing invoices?
- Q** Did you know accounting technology advances could allow us to work together more effectively?
- Q** Would you like to spend less time on the books and more time in the business?
- Q** Did you know that you could save weeks of time by using more mobile technology in your business?
- Q** How many invoices are you sending per month?

Exploratory meeting

You can help your clients make a good decision by:

- Asking them to put a dollar value against each benefit
- Outlining the benefits of cloud accounting

We have created a useful cloud readiness worksheet to help you frame cloud conversations (see right). This will get your client excited about what they will be gaining by making a change.



Software Change Readiness Worksheet

Item	Time	Value (\$)
Time-saving		
Do you regularly need to locate and email company files?		
Have you ever lost information as a result of not backing up?		
Are you spending a lot of time on manual data entry?		
Do you find yourself frequently chasing invoices?		
How many invoices are you sending per month?		
Business Health/Visibility		
Are you on the road for your business?		
Would you like more visibility of your cash flow and business financial position?		
Are you confident that you have good insight into your business risks and opportunities as they arise?		
Would you like to spend less time on the books and more time in your business?		
Would you like to increase your revenue?		
TOTAL		

Handling objections

It's likely that you may need to address and overcome objections or rebuttals. Some of the common objections you may receive include the following:

How do I know that the cloud is secure?

Intuit relies on advanced, industry-recognized security safeguards to keep all of your financial data private and protected. With password-protected login, firewall-protected servers, and the same encryption technology used by the world's top banking institutions, they have the security in place to give you peace of mind.

What kind of technical support is available?

Intuit offers free North American support during regular business hours.

I don't want to learn a new system.

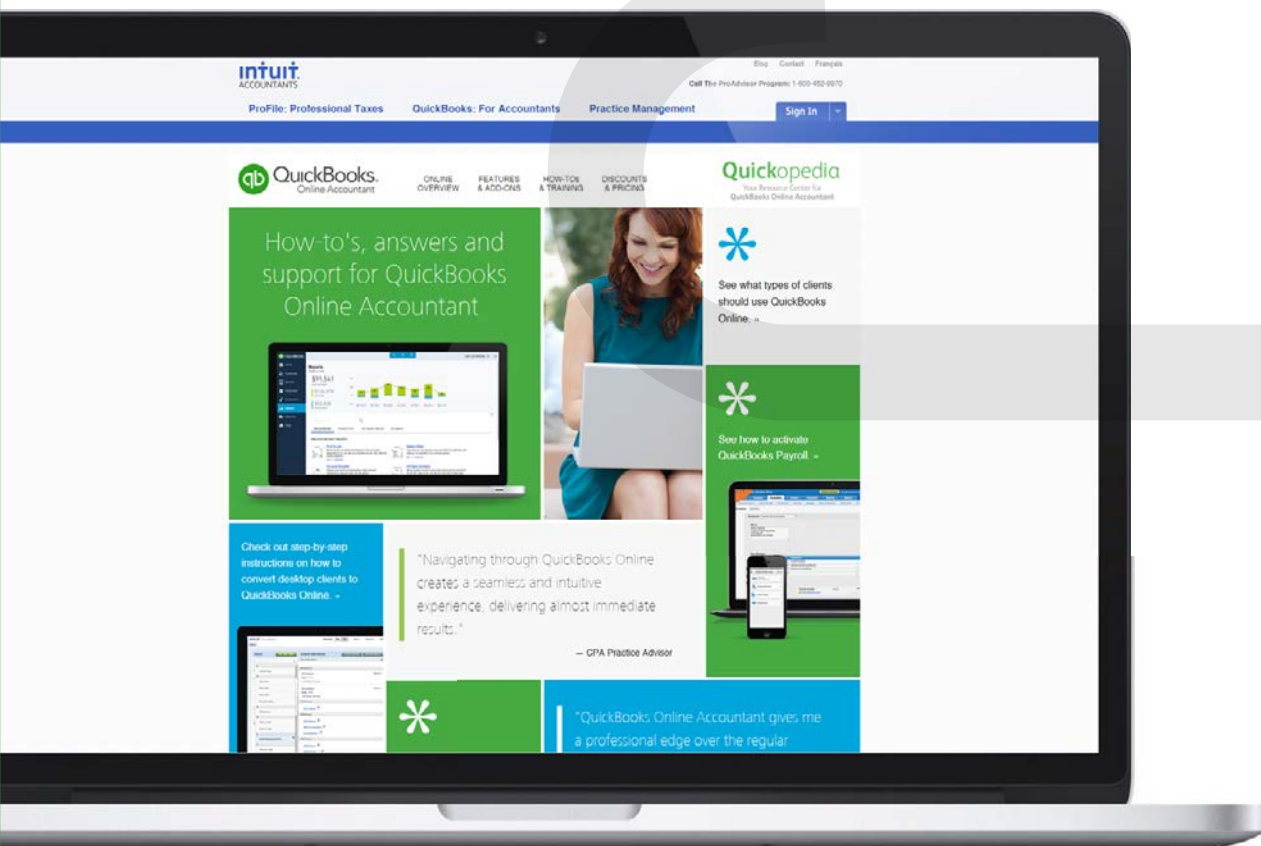
The software is very easy to use and requires little training and, to support this, Intuit is working with me to offer free training to all of my clients. My next session is scheduled for <insert date>. They even have basic and intermediate training for you as well at www.accountingcycle.com/freeqbo.

I don't want to lose my historical data.

You will not lose your data. Intuit is currently offering a free data conversion service, which means all of your data will be transferred into the new system.

I want to see more information about QuickBooks Online.

They have a very robust website at quickbooks.ca that will show you everything you need to know.



Other useful tools

We'll help you every step of the way

The ProAdvisor team has developed a range of conversation starters, videos, and testimonials to help you have client conversations.

Simply visit proadvisor.ca/quickopedia to access information such as:

- Step-by-step instructions on how to convert a client online
- What are the right types of clients for QuickBooks Online?
- Training and tips on how to become an expert on QuickBooks Online and online payroll
- Exclusive discounts and pricing for your clients

+ lots more!



For more information, call your assigned Account Manager or:

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