



## Intuit Thrive Conference Agenda

November 20 (Day 1)		
TIME	TOPIC	SPEAKER
8:30AM - 10:00AM	Registration Opens	
9:00AM - 10:00AM	Breakfast	
10:00AM - 10:20AM	Opening Remarks	Jeff Cates
10:20AM - 11:05AM	KEYNOTE: 7 Steps to Achieve Value Pricing	Mark Wickersham
11:05AM - 11:35AM	Technology Showcase/Break	
11:40AM - 12:10PM	The Firm of the Future with Practice Ignition	Guy Pearson
12:10PM - 12:55PM	CRA	TBD
1:00PM - 2:00PM	Lunch	
2:05PM - 2:50PM	Hiring an Accountant/Bookkeeper: You'll Need More than a Phone Book	Dianne Mueller & Louie Prosperi
	Developing Your Niche	Jeff Borschowa
	Auto Fill My Return, Working Papers & Client Collaboration	Mike Ford
	Starting To Build Your App Ecosystem	Jennie Moore
	Selecting/Attracting Your First QBO Client	Dianna Thorne
	Hiring Right	Juliet Aurora & Steve Loates
2:45PM - 3:15PM	Technology Showcase/Break	
3:25PM - 4:10PM	The New Reality - How Technology & Innovation Impact the Traditional Bookkeeping & Accounting Practice	Dianne Mueller & Louie Prosperi
	The Top 5 Mistakes Tax Preparers Make	Mike Ford
	Reinvent Your Practice (Today, Tomorrow And Beyond)	Alan Salmon
	Apps For Your Accounting/Bookkeeping Practice	Jeff Borschowa
	Bank Reconciliation Deep Dive	Esther Friedberg Karp
	Using Social Media To Grow Your Practice	Steve Loates
4:20PM - 4:55PM	Product Update: Desktop	Esther Friedberg Karp
4:55PM - 5:00PM	Closing Remarks	
5:00PM - 6:00PM	KEYNOTE: Marketing Yourself	Arlene Dickinson
6:00PM - 7:30PM	Cocktail Reception in the Technology Showcase Room	
7:30PM - 11:00PM	Alan Doyle & the Beautiful Gypsies / Evening of Entertainment	

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## Intuit Thrive Conference Agenda

November 21 (Day 2)		
TIME	TOPIC	SPEAKER
8:30AM - 9:00AM	Breakfast	
9:00AM - 9:45AM	KEYNOTE: Top 10 Business Myths	Ron Baker
9:55AM - 10:40AM	Naïve Listening & the Importance of Having a Value Conversation With Your Customer	Louie Prosperi
	The Top ProFile Features You Need To Know	Mike Ford
	Teaching Your Clients How To Price	Mark Wickersham
	Apps For Workflow	Jennie Moore
	Automating Your Books	Esther Friedberg Karp
	Beyond Bookkeeping (QuickBooks For Charities)	Bill Kennedy
	10:40AM - 11:25AM	Technology Showcase/Break
11:35AM - 12:25PM	Panel Discussion: What SMBs Value About Their Accountants & Bookkeepers	Moderated by Scott Zandbergen
12:25PM - 1:25PM	Lunch	
1:30PM - 2:15PM	Bookkeepers & Accountants - The Importance & Value for SME Entrepreneurs (Panel)	Louie Prosperi & Dianne Mueller
	Top Tax Tips (T1s)	Michael Di Lauro
	Practical Pricing for Profitability	Ron Baker
	Apps For The Service Industry	Jeff Borschowa
	Onboarding Your First QBO Client	Juliet Aurora
	Peak Your Profits: Scale up Your Firm, Your Profile and Your Impact	Evelyn Jacks
2:20PM - 3:05PM	How IPBC Adds Value to the Profession of Bookkeeping, Bookkeepers & the Industry	Louie Prosperi
	Top Tax Tips (T2s)	Mike Di Lauro
	Building Your Marketing For Your Bookkeeping Business.	Michael Palmer
	Apps For The Trades	Jennie Moore
	QuickBooks Den: App Pitch Contest	
	CRA	TBD
3:10PM - 3:55PM	Technology Showcase/Break	
4:00PM - 4:45PM	Product Update: ProFile	
4:45PM - 5:30PM	What's New in QBO(A)	
5:30PM - 5:45PM	Closing Remarks	Jim McGinnis
6:00PM - 11:00PM	Cocktail Reception at the Hockey Hall of Fame	

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Intuit Thrive Conference  
November 20-22, 2016  
Fairmont Royal York Hotel  
Toronto, ON  
<http://intuitthrive.ca/>

## Intuit Thrive Conference Agenda

November 22 (Day 3)		
TIME	TOPIC	SPEAKER
8:30AM - 9:00AM	Breakfast	
9:00AM - 12:00PM	Basic QuickBooks Online Certification	
	Advanced QuickBooks Online Certification	
	ProFile Basics (T1s)	
9:00AM - 10:00AM	Hubdoc	
10:15AM-11:15AM	TSheets	
12:00PM - 1:00PM	Lunch	
1:00PM - 4:30PM	Basic QuickBooks Online Certification Continued	
	Advanced QuickBooks Online Certification Continued	
	ProFile Advanced (T2s & T3s)	
1:00PM - 2:00PM	Plooto	
2:15PM - 3:15PM	Receipt Bank	
3:30PM - 4:30PM	Fathom	



## Session Descriptions

### Pricing Secrets: The 7-step Formula that Reveals How to Get a Better Price

Keynote Speaker: Mark Wickersham

Cloud accounting changes everything.... Your relationship with your client and the way you price. Firms that cling to the old-fashioned pricing models in a world where technology is reducing the time required for data processing and compliance works means many firms face extinction!

In this research-based keynote, best-selling author Mark Wickersham FCA reveals:

- Why charging an hourly rate is so completely stupid, and why quoting a single fixed price is not much better - in this session you will discover a better way
- The BIG mistake most accounting professionals make with their pricing (your competitors are definitely making this mistake; make sure you aren't)
- A step-by-step process for presenting your prices (a formula enabling many firms to DOUBLE their prices and more)
- The power of price psychology and how to make your price appear smaller than it really is, and
- What every accounting professional wishes they were taught on day one... this secret will change the profits of bookkeeping and accounting firms forever.

We have to embrace cloud accounting because it's here to stay. And we have to price in a different way otherwise our profits will be in danger of significant erosion.

### Teaching Your Clients How to Price

Keynote Speaker: Mark Wickersham

For any business - including every one of your clients - there are 9 key drivers of profit. Helping a client in any one of those 9 drivers will improve their profit. And there is one driver which is the most misunderstood, the most neglected, and yet by far the most powerful.

*It's the price lever.*

Small business owners have no idea how to price their services. It's usually based on emotion and their cost structure. This is why your clients are working far too hard for far too little profit.

When you show them how to price their products and services you will change their lives. You will become the hero. And you can earn very high consulting fees.

In this session best-selling author Mark Wickersham FCA will show you:

- How to package your high-value solution
- How to price your offering
- How to successfully sell your new offering to clients, and
- How to deliver it with confidence.

This is an advanced session for accounting professionals with a good grasp of value pricing principles and price psychology (but don't worry, Mark will give you a good foundation in the keynote session the day before).



### Top Ten Business Myths

Keynote Speaker: Ron Baker

Ideas have consequences, and bad ideas are a competitive disadvantage. This presentation is dedicated to the possibility that many myths exist about business and it would be more optimal to discard these bad ideas. Thinking about these myths is difficult because it requires us to examine some of our most deeply held beliefs about the way the business world works. Economist John Maynard Keynes said, "The difficulty lies, not in the new ideas, but in escaping from the old ones." Philosopher Bertrand Russell added, "The resistance to a new idea increases as the square of its importance." Join radio talk-show host Ron Baker as he falsifies each of these ten myths, and posits better ideas and six transformational questions that will enhance your organization's wealth-creating capacity. He asks you not to think like him, but to think with him.

Attendees will learn:

- Why so much of the conventional wisdom is more conventional than actual wisdom
- How to overcome these myths, and focus on what truly matters in your company

### Practical Pricing for Profitability

Keynote Speaker: Ron Baker

Are you still uncomfortable with the idea of implementing Value Pricing? You are not alone, even though we all know that hourly billing places an artificial ceiling on the income we can earn. We put this ceiling over our own heads; the customers did not place it there.

Join Ron Baker in this session to learn a formula for pricing that does something quite strategic (and cunning) with this ceiling, providing you with ideas you can implement immediately in your firm.

### Reinvent Your Practice (Today, Tomorrow and Beyond)

Speaker: Alan Salmon

We have more new technology to consider this year than almost any year in the last decade. Hardware and software are changing quickly, the Cloud impacts business decisions, mobile strategies are becoming more clear, and the Internet of Things is a game-changer on all fronts. In this session, you will learn how to create a technology roadmap that helps you to improve organizational efficiency and avoid pitfalls.

### Beyond Bookkeeping (QuickBooks for Charities)

Speaker: Bill Kennedy

Learn how to manage your charity's financial responsibilities including budgeting (controlled spending), financial control (safeguard the assets entrusted to your charity), board reporting (show stakeholders the impact of their donations), track programs to meet individual funder requirements, and integrated systems (efficient use of staff resources).

### Selecting/Attracting Your First QBO Client

Speaker: Dianna Thorne

Are you interested in starting your own QuickBooks online practice and not sure how to gain clients and build your practice? Join us as we share some of the best methods on how to select and attract your first QuickBooks Online client.

### Peak Your Profits: Scale Up Your Firm, Your Profile and Your Impact

Speaker: Evelyn Jacks

When you use powerful software really well and add confident knowledge and professionalism, you just might find yourself turning great clients away. Why? Perhaps you feel there is limited capacity to take on more at the



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service levels you wish to provide. The good news? It's possible to expand capacity, attract more great clients and provide an even better value proposition by repositioning your firm on a vibrant growth platform. In this informative session with Canada's leading educator in the tax and financial services Evelyn Jacks, President of Knowledge Bureau, you'll be inspired to answer the question, "Do You Want to Grow?" with a resounding Yes!



#### The Firm of the Future with Practice Ignition

Speaker: Guy Pearson

Join CEO of Practice Ignition Guy Pearson as he discusses the research they've conducted on the direction of the industry, and his unique philosophy to Accountant and Bookkeeper business development.

#### Developing Your Niche

Speaker: Jeff Borschowa

Niche development is the intersection between marketing and sales and, arguably, the foundation for both. What is your ideal client? We focus on defining your niche and discuss a 12 step process to deliberately build a niche that can provide a never-ending stream of referrals.

#### Starting to Build Your App Ecosystem

Jennie Moore

The beauty of cloud accounting and apps is that there are always ongoing improvements to make your lives easier. The hard part? Finding and adopting the right technology to fit your firm and your clients' specific needs. In this session join Jennifer Moore, founder and Certified Bookkeeper with Moore Details Bookkeeping, and learn how she chooses apps for her business.

#### Hiring Right

Speaker: Juliet Aurora and Steve Loates

Are you interested in starting your own QuickBooks online practice and not sure how to gain clients and build your practice? Join us as we share some of the best methods on how to select and attract your first Quickbooks Online client.

#### Hiring an Accountant or Bookkeeper: You'll Need More Than a Phone Book

Speaker: Dianne Mueller and Louie Prospero

Your accountant or bookkeeper should be able to do more than math and keep you compliant. In this session learn about hiring a certified accountant and certified bookkeeper and the different roles these advisors can play in supporting your day-to-day business. Learn the services, and questions you should ask on the path to hiring the right team member for your business.

#### The New Reality - How Technology & Innovation Have Impacted the Traditional Bookkeeping & Accounting Practice

Speaker: Dianne Mueller and Louie Prospero

The technological advancements in our industry have made us more efficient and responsive to our customers' needs. It has impacted how we interact with our customers, what our customers expect, want and how they perceive value. There has been a fundamental shift in, perceived value of services, change in delivery methods and how we communicate with them. Today's customer is looking for a product and service mix that is more active and future oriented. We will take a look at these challenges facing the Professional Bookkeeper and Accountant and look at options on how to adapt to this new reality.

#### Naïve Listening & the Importance of Having a Value Conversation with Your Customer

Speaker: Louie Prospero

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#### Bookkeepers & Accountants - Importance & Value They Bring to the SME Entrepreneur (Panel Discussion)

Speaker: Louie Prospero

The Micro and SME Entrepreneur business owner relies extensively on their professional bookkeeper and accountant in helping them manage their financial and management needs. The Entrepreneur generally does not have the resources to have this expertise in house, therefore these experts will share how their working



relationships have fostered business growth within their practices and improved the quality of services provided to the customer. They will discuss the importance of accountants and bookkeepers working together to assure their mutual customer receives the customized and optimal service they need for their businesses to function and grow in today's demanding market place.

#### How IPBC Adds Value to the Profession of Bookkeeping, Bookkeepers & the Industry.

Speaker: Louie Proseri

We will discuss the benefits that IPBC brings to profession and end customer through their leadership, standard setting programs and support to the bookkeeping community. This session will cover the importance and benefits to all professional bookkeeper's why it is important to belong to an organization that represents their interests and support's their career and business goals, through member benefits, certification and advocacy.

#### What's New in QBO(A)

Speaker: Melika Hope, Lee McKenzie; Sr. Product Managers of QuickBooks Online & QuickBooks Online Accountant

QuickBooks Online is constantly evolving as we work diligently to make the most powerful accounting software for small businesses and accountants. Join us to learn the latest updates and new features designed to make you and your clients more efficient, productive and collaborative.

#### Auto Fill My Return, Working Papers & Client Collaboration

Speaker: Mike Ford

We'll cover some of the most powerful, yet least utilized parts of the software used to return more than 4.3m Canadians' taxes.

#### The Top 5 Mistakes Tax Preparers Make

Speaker: Mike Ford

It's never too early to start preparing for tax season. In this session, we will review the five common mistakes tax preparers make and detail how you can overcome them.