



This is the action plan  
you've been looking for.

---

Confidently move your firm into the future. We're here to help.



# Congratulations on choosing to become a Firm of the Future.™

There's a whole lot to be excited about right now. Greater productivity, deeper client relationships, and sustainable growth leading to greater profitability—these rewards are waiting for you as you begin your transformation. We're here to help!

---

Use this guide to navigate the three key elements of becoming a Firm of the Future:



## Move to the cloud

Save time and boost productivity by taking advantage of simple, powerful online solutions.



## Become a trusted advisor

Attract new business and build loyal client relationships with an updated billing model.



## Market your practice

Distinguish yourself from the competition through low-cost, high-yield digital marketing tools.



## Move to the cloud

- ☐ Sign up for QuickBooks Online Accountant..... 1
- ☐ Get certified in QuickBooks Online..... 2
- ☐ Create a “firm realm” to prepare for moving your firm online..... 3
- ☐ Move your own firm to QuickBooks Online Accountant ..... 4
- ☐ Identify the right clients for QuickBooks Online..... 5

**SUMMARY WORKSHEET: Planning your move to the cloud..... 6**



## Become a trusted advisor

- ☐ Take advantage of resources ..... 7
- ☐ Expand your suite of services..... 8
- ☐ Transition to value pricing ..... 8
- ☐ Define your niche..... 12
- ☐ Expand your client list..... 12

**SUMMARY WORKSHEET: Becoming a trusted advisor..... 13**



## Market your practice

- ☐ Build and optimize your online presence..... 14
- ☐ Use social media to drive growth..... 15
- ☐ Get listed in the Find-an-Accountant online directory ..... 16

**SUMMARY WORKSHEET: Marketing your practice ..... 17**

**APPENDIX A: Your complete Firm of the Future action plan..... 19**

**APPENDIX B: Take your firm to the future..... 20**



“By utilizing the latest cloud accounting technologies, we can improve the day-to-day operations and eliminate the inefficiencies that waste time and have little added value for our clients.”

- TOM NATSIKAS,  
PRESIDENT, MTL ACCOUNTING AND FOUNDER,  
CLOUDACCOUNTANTS.ORG



# Move to the cloud

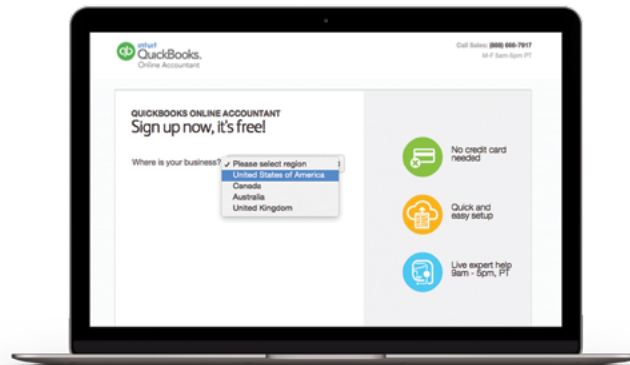
---

In this section, we'll help you move from desktop accounting to the highly efficient QuickBooks® Online Accountant—and we'll direct you to the tools you need to help your clients make the same transition. The result? Improved productivity, collaborative client relationships and sustainable growth for you *and* the clients who rely on you.

---

## Sign up for QuickBooks Online Accountant

Embrace efficiency-boosting, task-conquering tools built exclusively for busy accountants.



---

### ★ GOOD TO KNOW:

With QuickBooks Online Accountant, you'll gain:

- ✓ **Greater visual scope.** Manage all clients' books from a single dashboard.
- ✓ **Higher productivity.** Instantly see which tasks need your attention.
- ✓ **More efficiency.** Free your time by eliminating manual data entry.

### HERE'S HOW:

Sign up for free [here](#)!



# Get certified in QuickBooks Online

Proficiency in QuickBooks Online will demonstrate to clients that you're the online expert they're looking for.

## ★ GOOD TO KNOW:

### Gain the support and exposure you need to grow your firm.

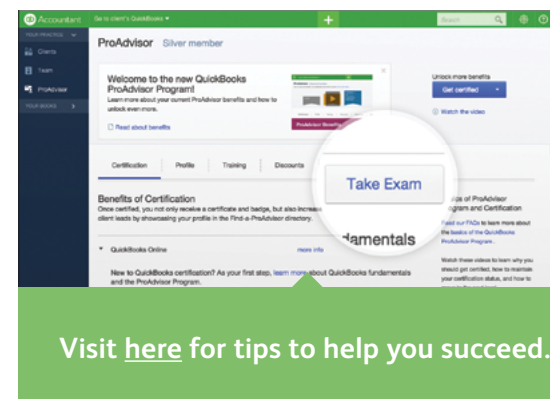
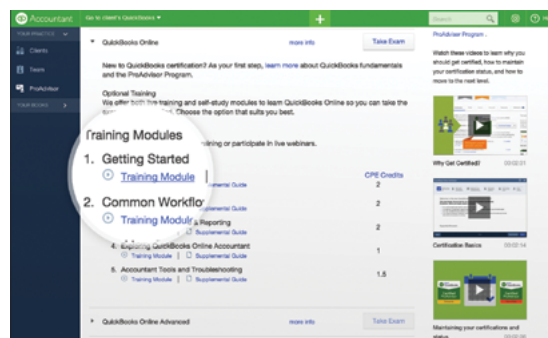
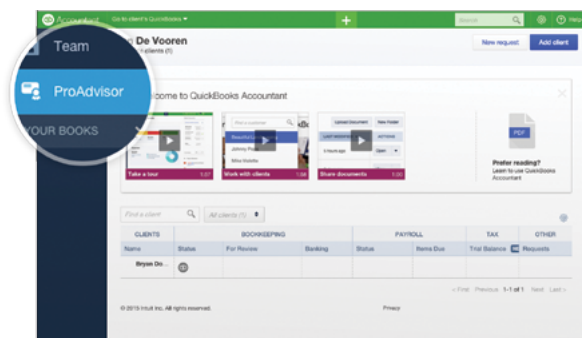
Once certified, you'll unlock access to dedicated support from a team of QuickBooks experts *and* a free listing on the popular Find-an-Accountant online directory.

## ★ GOOD TO KNOW:

**Earn free CPD.** Take advantage of online training opportunities to prepare for your certification exam. Consider making it an all-staff event at your firm!

## HERE'S HOW:

1. Log in to QuickBooks Online Accountant and click on the ProAdvisor tab.
2. Brush up on your expertise (and earn CPD credits!) with optional training modules.
3. Click "Take exam." Most people finish the exam in about two to three hours, and you get five attempts for the Basic Certification, and four attempts for the Advanced Certification.



Consider registering for an in-person training event or a free weekly live webinar.

Visit our [events page](#) to see details and schedules.

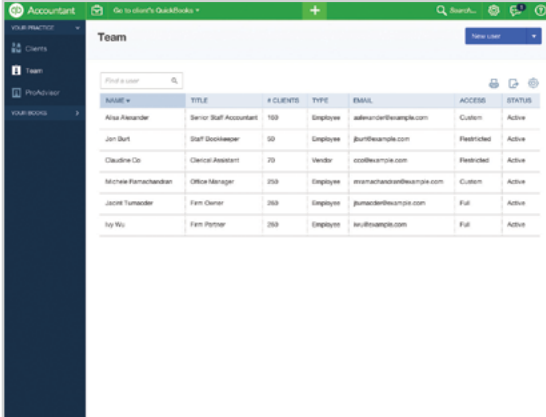
UPCOMING TRAINING EVENTS IN MY AREA:

# Create a “firm realm” to prepare for moving your firm online

A firm realm is a group of client accounts consolidated under a layer of security. When you set up a firm realm, you can protect sensitive data by assigning which staff members have access, and when.

## HERE'S HOW:

1. Identify your firm realm's Master Administrator.
2. Create a unique email address for your realm, accessible only to the Master Administrator.  
*Example: accounting@yourdomain.com*
3. Create a new QuickBooks Online Accountant account using the realm email address.
4. For support in consolidating client lists into a single realm, call our customer care team at 1 (855) 253-1536.
5. Set up wholesale pricing payment information by clicking the gear icon, then selecting Your Account. For more information about how wholesale pricing can help you save money and gain control over your billing, skip to page 11.
6. Invite your team to join by clicking the Team tab.



Name	Title	# Clients	Type	Email	Access	Status
Alice Alexander	Senior Staff Accountant	100	Employee	alexander@sample.com	Custom	Active
Jon Durr	Staff Bookkeeper	50	Employee	jondurr@sample.com	Restricted	Active
Claudia Co.	Clerical Assistant	20	Vendor	coo@sample.com	Restricted	Active
Michael Rasmussen	Office Manager	250	Employee	michaelrasmussen@sample.com	Custom	Active
Jane Tomacider	Firm Owner	200	Employee	jane@sample.com	Full	Active
Top Wu	Firm Partner	200	Employee	wu@sample.com	Full	Active

## ★ GOOD TO KNOW:

Firm realms can quickly grow to hundreds of clients. You can manage this by creating multiple realms segmented by client industry, location, service type—whatever makes sense to your firm

## ★ GOOD TO KNOW:

Need to add a new client to QuickBooks Online Accountant? Simply click “Add client” in the top right corner of your screen.

# Move your own firm to QuickBooks Online Accountant

Position yourself to make a confident recommendation to your clients by experiencing the benefits of moving online first-hand.

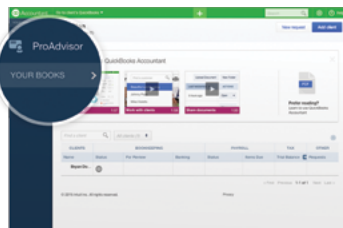
## HERE'S HOW:

Log in to QuickBooks Online Accountant and follow these steps.

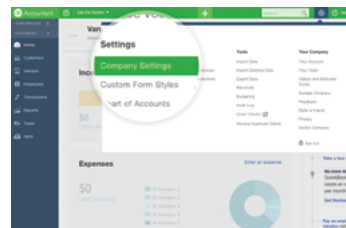
Click the gear icon. Under Tools, select "Import Desktop Data."



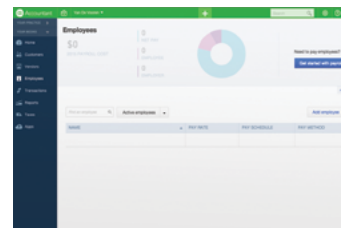
From under Your Practice on the left menu, click "Team" and select a staff member to define their account access.



Click "Your Books" in the left menu.



Edit your info in "Company Settings."



Start using QuickBooks Online.

“By leveraging great technology I can dramatically reduce the amount of time spent by myself and my clients on busy-work, and focus instead on growing our businesses.”

- ANDREW WALL,  
FOUNDING PARTNER, WALLCPA

# Identify the right clients for QuickBooks Online

Different clients have different needs. Find out which ones are best suited for working online, starting with these three guides available for download at [firmofthefuture.ca](http://firmofthefuture.ca):

QuickBooks Online also has high-efficiency features that are perfect for non-profit organizations!

## ★ GOOD TO KNOW:

Choose from over 130 apps to enhance the power of QuickBooks Online and meet the needs of clients in different lines of business. Visit [apps.com](http://apps.com) to start exploring.



### Appointment-Based Businesses

These clients prioritize service above all else. Working online helps them automate accounting tasks, freeing their time to stay focused on customers.

MAKE A LIST OF YOUR APPOINTMENT-BASED CLIENTS:



### Retail and eCommerce Businesses

To manage profit and loss, these clients are looking for tighter integration between their books and their payment platforms. By working online, they'll have exactly what they need.

MAKE A LIST OF YOUR RETAIL AND eCommerce CLIENTS:



### Professional and Field Services Businesses

These clients benefit from on-the-go visibility into their cash flow, helping them stay profitable from job to job. Working online does that for them.

MAKE A LIST OF YOUR PROFESSIONAL AND FIELD SERVICES CLIENTS:



## SUMMARY WORKSHEET

# Planning your move to the cloud

Use this checklist to chart your transition over the coming months.

---

### Section 1:

**Which goals have you already completed? Check all that apply.**

- ☐ Sign up for QuickBooks Online Accountant
- ☐ Get certified in QuickBooks Online
  - ☐ Earn CPD through free certification training
  - ☐ Complete the QuickBooks Online certification exam
- ☐ Create a “firm realm” to prepare for moving your firm online
- ☐ Move your own firm to QuickBooks Online Accountant
- ☐ Identify the right clients for QuickBooks Online
  - ☐ Download the free guides that apply to your clients
  - ☐ Explore apps designed to meet your clients’ specific needs

### Section 2:

**Which goals would you like to reach next—and when?**

IMMEDIATELY:

IN THREE MONTHS:

IN SIX MONTHS:



“Taking full advantage of the advancements in technology means we do much less paper shuffling and data entry now. This means we can use our accounting expertise to spend time empowering business owners to understand and own their numbers!”

- ELAINE ORR,  
CEO, BALANCESHEETS.CA

# Become a trusted advisor

---

More and more small businesses are turning to their accountants for strategic guidance and expertise—and now that you’re on the cloud, you have the time and the tools to become their trusted advisor. In this section, we’ll show you how to achieve and maintain that status, ensuring that client-accountant relationships can grow closer and more transparent than ever before.

---

## Take advantage of resources

Accelerate your Firm of the Future journey with additional tools, tips and tricks.

### HERE’S HOW:

Visit [firmofthefuture.ca](https://firmofthefuture.ca) to learn from thought leaders and other accountants who have transformed their practices. You’ll find useful insights, expert advice and in-depth videos to help you take charge of your firm’s future.

---

### ★ GOOD TO KNOW:

Our three-part PDF series, *The Accountant’s Guide to Moving Online*, is available as a free download. Visit [firmofthefuture.ca](https://firmofthefuture.ca) for your copy.

# Expand your suite of services

Working online will help you free more hours each week—hours that you can reinvest in your firm by offering diversified value-added services.

You'll gain new sources of revenue, and your clients will gain the strategic support they need to meet their goals.

**Here are three examples of in-demand services to consider:**



## Strategic advisory services

Help your clients with risk management, succession planning and more.



## Profitability consulting

Provide clients with next-level insights and guidance to help their businesses grow.



## Virtual financial services

Become your clients' trusted source for strategic financial perspectives.

# Transition to value pricing

By prioritizing your expertise over the hours you spend, value pricing (sometimes called “fixed fee” or “flat rate” pricing) helps you establish predictable revenue while providing optimized client support.

## ★ GOOD TO KNOW:

### Clients benefit from value pricing too.

They gain transparency into their month-to-month costs, which helps them budget and encourages them to ask questions or make requests without worrying about added cost.

“Our clients dream, create and succeed. As cloud ready accountants, we seek to fuel their entrepreneurial spirit, and we couldn't do it without the innovative ecosystem available to us.”

- OBED MAURICE,  
FOUNDER, MAXIM MANAGEMENT

## What does value pricing look like?

Doing away with the old time-based billing model will give you the flexibility to assemble custom packages that fit your firm's service offering and clientele. Here's an example:

	Basic	Hands-On	Hassle-Free
Dedicated account manager	✓	✓	✓
Cloud accounting software subscription	✓	✓	✓
Transition or conversion	✓	✓	✓
Bank integration	✓	✓	✓
Accounting and financial reporting	✓	✓	✓
Accounts receivable and payable reporting	✓	✓	✓
Support	Email	Phone and email	Priority phone and email
Monthly transactions (up to)	50	200	Unlimited
Reconciliation	Quarterly	Monthly	Weekly
CPA business strategy session	Quarterly	Monthly	Monthly
Payable service			✓
Workflow-enhancing apps			✓

## Transition to value pricing with practical advice from an expert

Ron Baker is a world-renowned author and value pricing specialist. Through our series of on-demand videos, he can help you develop the skills you need to lead your own firm's transition.

Visit [firmofthefuture.ca/advisor.html](http://firmofthefuture.ca/advisor.html) to take advantage of this four-part video series:

**Part 1:** The firm of the future: From professional service firm to professional knowledge firm

**Part 2:** Having the value conversation

**Part 3:** Pricing the customer, not the services /  
Developing and pricing options

**Part 4:** Fixed price agreements, pricing objections, project management, change requests, change orders and pricing after action reviews



“Firms of the past sell time. Firms of the future sell outcomes. That’s what gives them a more reliable revenue stream.”

RON BAKER  
AUTHOR AND VALUE  
PRICING SPECIALIST





## Pro Tip: Take advantage of wholesale pricing

Wholesale pricing is the #1 way to adopt a value-based billing model while unlocking the best savings possible on QuickBooks Online. With wholesale pricing, you'll have what you need to:



### Save 50% for life<sup>1</sup>

You pay half the MSRP on QuickBooks Online for the life of your clients' subscriptions—simple as that.



### Maintain control

Add and remove clients at any time and see exactly who's enrolled via one consolidated monthly bill.



“Wholesale pricing is a no-brainer. It provides all the benefits of QuickBooks Online, and it's a lot cheaper.”

ANDREW MCPHUN,  
ACCOUNTANT

## HERE'S HOW:

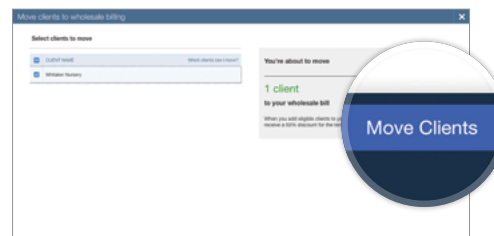
### How to add **new clients** to wholesale pricing:

1. Log in and click “Add client.”
2. Fill in client contact information.
3. Select product and choose the wholesale pricing option.



### How to add **existing clients** to wholesale pricing:

1. Log in.
2. Click the Settings gear icon and select “Your Account,” then click “Move clients to wholesale.”
3. Select clients and click “Move clients.”



### ★ GOOD TO KNOW:

Before adding an existing client to wholesale pricing, you or your client will need to transfer the master administrator rights to your firm. For step-by-step instructions, please visit <http://bit.ly/MA-admin>.

1. QuickBooks Online 50% savings offer: Discount offer is valid for a limited time only. You can give your clients 50% off the then-current MSRP pricing of QuickBooks Online (includes Essentials and Plus) for the life of their subscription when you sign up for wholesale pricing within your QuickBooks Online Accountant account. The MSRP price is subject to change at any time in Intuit's sole discretion. Terms, conditions, pricing, features, service and support options are subject to change without notice.

# Define your niche

What is your vision for the future of your practice? How do you want to be known by your clients, and what do you want your professional life to look like? By developing a focused plan now, you can achieve those goals sooner than you think.

## HERE'S HOW:

1. Ask yourself what elements you want in your future.  
Examples include:
    - ☐ Quality clients
    - ☐ A specific industry
    - ☐ A clearly defined service offering
    - ☐ Optimized use of cloud-based tools
    - ☐ More time to spend with family
    - ☐ Other
  2. Examine the history of your practice and identify areas that inspire you and areas that are distracting you from your goals.
  3. Based on #1 and #2, begin drafting a 90-day plan that will bring you closer to the future you want. Every 90 days, stop to assess how far you've come and make adjustments to your plan.
- 

# Expand your client list

Working online means accepting clients from anywhere. Which means greater control over the type of clients you accept to help build your niche.

## HERE'S HOW:

1. Define your ideal client.
  - What industry or business vertical do you work with best?
  - Do you prefer clients who need more than one of your services?
  - Do you prefer clients who are well established, or just starting out?
2. Find your ideal client!  
  
Use the techniques you'll discover in the "Market your Practice" section (see page 14).

## SUMMARY WORKSHEET

# Becoming a trusted advisor

Use this worksheet to plan your next steps towards deeper client relationships.

---

### Section 1:

**Which goals have you already completed? Check all that apply.**

- ☐ Take advantage of resources
  - ☐ Visit [firmofthefuture.ca](http://firmofthefuture.ca)
  - ☐ Download the free *Accountant's Guide to Moving Online*
- ☐ Expand your suite of services
- ☐ Transition to value pricing
  - ☐ Develop your firm's custom service packages
  - ☐ Take advantage of Ron Baker's value pricing video series
  - ☐ Add clients to wholesale pricing
- ☐ Define your niche
  - ☐ Identify past successes and future goals
  - ☐ Draft a 90-day plan
- ☐ Expand your client list

### Section 2:

**Which goals would you like to reach next—and when?**

IMMEDIATELY:

IN THREE MONTHS:

IN SIX MONTHS:



# Market your practice

---

In this section, we'll show you what steps you can take to help qualified prospects find you. The secret? Digital marketing. Find out how you can engage with existing clients, attract new ones and grow your practice through free or low-cost platforms like Facebook, LinkedIn, your own website, and more.

---

## Build and optimize your online presence

A robust website will welcome prospects, inform existing clients and represent your firm in the best possible light.

### HERE'S HOW:

1. Decide who will build or redesign your website. Use a do-it-yourself web building service like Squarespace to build it yourself, or contact a professional who will work with you to:
  - Clarify your goals for the website
  - Create a design that reflects your firm's mandate
  - Write messaging that will attract the right clients
  - Identify hosting solutions

---

### ★ GOOD TO KNOW:

**60%** of a prospect's buying decision is made using online sources such as a company's website, instead of talking to the company directly.<sup>1</sup>

---

2. Maximize your search engine optimization (SEO). If qualified prospects can't find your website, then you're not getting a good return on your investment. That's where SEO comes in. Consult with an expert to make sure that you've positioned your website for maximum visibility.

1. [http://www.firmofthefuture.com.s3.amazonaws.com/CA\\_PDF/value-of-connected-brand\\_CA.pdf](http://www.firmofthefuture.com.s3.amazonaws.com/CA_PDF/value-of-connected-brand_CA.pdf)

# Use social media to drive growth

In today's digital economy, social media has become an important engine for business growth. Use it to get your firm noticed and share ideas with your peers.

---

## ★ GOOD TO KNOW:

We have the resources you need to jump-start your social media growth strategy. Start with the tips, tricks and expert-driven articles you'll find at:

[firmofthefuture.ca](http://firmofthefuture.ca)

AND

[The QuickBooks Blog](#)

---

Find out what your  
peers are doing!





# Get listed in the Find-an-Accountant online directory

Accelerate your firm's growth by describing your expertise and services on the directory that's searched by over 700,000 prospective clients each year.<sup>2</sup>

## HERE'S HOW:

1. Log in to QuickBooks Online Accountant and click the ProAdvisor tab in the left menu.
2. Click on the Profile tab in your ProAdvisor Center.
3. Write an amazing profile. Let prospects know what you can do for them.

**TIP:** *Don't skip the photo! It's your chance to help clients feel comfortable when reaching out to you.*

2. Based on average number of unique visitors to the Find-an-Accountant online directory from August 2013 to July 2014.

## SUMMARY WORKSHEET

# Marketing your practice

Use this worksheet to determine which steps to tackle first.

---

### Section 1:

**Which goals have you already completed? Check all that apply.**

- ☐ Build and optimize your online presence
  - ☐ Identify who will build or redesign your website
  - ☐ Consult with a search engine optimization expert
- ☐ Use social media to drive growth
  - ☐ Visit the suggested URLs for tips and tricks
  - ☐ Develop a strategy for Facebook, Twitter, LinkedIn and YouTube
- ☐ Get listed in the Find-an-Accountant online directory

### Section 2:

**Which goals would you like to reach next—and when?**

IMMEDIATELY:

IN THREE MONTHS:

IN SIX MONTHS:

# You're well on your way.

This is a journey towards greater productivity, flexibility and online expertise—a journey which can lead, ultimately, to growth and profitability. Start planning your transformation and secure your position as a thriving Firm of the Future with help from this guide and the resources at **[firmofthefuture.ca](http://firmofthefuture.ca)**.

# Your complete Firm of the Future action plan



## Move to the cloud

- ☐ Sign up for QuickBooks Online Accountant
- ☐ Get certified on QuickBooks Online
- ☐ Create a “firm realm” to prepare for moving your firm online
- ☐ Move your own firm to QuickBooks Online Accountant
- ☐ Identify the right clients for QuickBooks Online



## Become a trusted advisor

- ☐ Take advantage of resources
- ☐ Expand your suite of services
- ☐ Transition to value pricing
- ☐ Define your niche
- ☐ Expand your client list



## Market your practice

- ☐ Build and optimize your online presence
- ☐ Use social media to drive growth
- ☐ Get listed in the Find-an-Accountant online directory

# Take your firm to the future

Let's identify which of your clients are right for working online, then map your next steps.

Section 1:

## • Which clients can move online **right away**?

New clients	Clients who have asked to move online	In-house bookkeeping clients with clean files
TOTAL # OF CLIENTS:	TOTAL # OF CLIENTS:	TOTAL # OF CLIENTS:

### Next steps:

- ☐ Grow your online expertise with free QuickBooks Online training and certification.
- ☐ Learn the process involved in converting data from desktop to QuickBooks Online.
- ☐ Identify two or three apps designed to help you organize data and automate manual tasks.
- ☐ Talk to your QuickBooks Pro clients about the benefits of moving online.



Section 2:

## • Which clients can move online in **3 months**?

QuickBooks Pro clients	Clients expressing interest
TOTAL # OF CLIENTS:	TOTAL # OF CLIENTS:

### Next steps:

- ☐ Continue growing your expertise with QuickBooks Online training and certification.
- ☐ Identify the top two industries you support and the workflow apps designed just for them.
- ☐ Introduce your Premier and Enterprise Solutions clients to those industry-specific apps.

Section 3:

## • Which clients can move online in **6 months**?

Clients on Premier and Enterprise Solutions	Clients in all other industries
TOTAL # OF CLIENTS:	TOTAL # OF CLIENTS:

### Next steps:

- ☐ Take advantage of training and certification to discover even more apps.
- ☐ Continue talking to your Premier and Enterprise Solutions clients about the benefits of working online.





