Accelerating Growth with Mid-sized Clients Using QuickBooks
Day 1 - March 21, 2023

Pacific Time	Mountain Time	Central Time	Eastern Time	Total CPE Available: 6 credits
8:00 - 8:30am	9:00 - 9:30am	10:00 - 10:30am	11:00 - 11:30am	Networking Lounge and Exhibit Hall Open 30 min
8:30 - 9:45am	9:30 - 10:45am	10:30 - 11:45am	11:30-12:45pm	**Kick Off: Welcome and Keynote:** **Accelerate Growth with Mid-size Clients** Trainer: Helina Patience (75 min) 1 CPE
9:45 - 10:00am	10:45 - 11:00am	11:45 - 12:00pm	12:45 - 1:00pm	Networking Lounge, Exhibit Hall & Demo Lounge Now Open 15 min
10:00 - 12:00pm	11:00 - 1:00pm	12:00 - 2:00pm	1:00 - 3:00pm	**Session 1: Demystifying Advisory** Trainer: Joe Woodard (120 min) 2 CPE
12:00 - 12:15pm	1:00 - 1:15pm	2:00 - 2:15pm	3:00 - 3:15pm	Networking Lounge, Exhibit Hall & Demo Lounge Now Open 15 min
12:15 - 1:45pm	1:15 - 2:45pm	2:15 - 3:45pm	3:15 - 4:45pm	**Session 2: Practical Pricing** Trainer: Michelle Long (90 min) 1.5 CPE
1:45 - 2:00pm	2:45 - 3:00pm	3:45 - 4:00pm	4:45 - 5:00pm	Networking Lounge, Exhibit Hall & Demo Lounge Now Open 15 min
2:00 - 3:30pm	3:00 - 4:30pm	4:00 - 5:30pm	5:00 - 6:30pm	**Session 3: Introduction to Apps Advisory Services** Trainer: Liz Scott (90 min) 1.5 CPE
3:15 - 3:30pm	4:30 - 4:45pm	5:30 - 5:45pm	6:30 - 6:45pm	Networking Lounge, Exhibit Hall Now Open 15 min

Accelerating Growth with Mid-sized Clients Using QuickBooks
Day 2 - March 22, 2023

Pacific Time	Mountain Time	Central Time	Eastern Time	Total CPE Available: 6 credits
8:00 - 8:30am	9:00 - 9:30am	10:00 - 10:30am	11:00 - 11:30am	Networking Lounge and Exhibit Hall Open 30 min
8:30 - 10:30am	9:30 - 11:30am	10:30 - 12:30pm	11:30 - 1:30pm	**Session 4: Advanced Conversions** Trainer: MB Raimondi (120 min) 2 CPE
10:30 - 10:45am	11:30 - 11:45am	12:30 - 12:45pm	1:30 - 1:45pm	Networking Lounge, Exhibit Hall & Demo Lounge Now Open 15 min
10:45 - 12:45pm	11:45 - 1:45pm	12:45 - 2:45pm	1:45 - 3:45pm	**Session 5: Deep Dive into QuickBooks Online Advanced** Trainer: Erin Walsh-Dyer (120 min) 2 CPE
12:45 - 1:00pm	1:45 - 2:00pm	2:45 - 3:00pm	3:45 - 4:00pm	Networking Lounge, Exhibit Hall & Demo Lounge Now Open 15 min
1:00 - 3:00pm	2:00 - 4:00pm	3:00 - 5:00pm	4:00 - 6:00pm	**Session 6: Advanced Apps Advisory Services** Trainer: Liz Scott (120 min) 2 CPE
3:00 - 3:20pm	4:00 - 4:20pm	5:00 - 5:20pm	6:00 - 6:20pm	Networking Lounge, Exhibit Hall & Demo Lounge Now Open 20 min

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Accelerate Growth with Mid-sized Clients Using QuickBooks

March 21 - 22, 2023

Accelerate Growth with Mid-size Clients

There is a growing opportunity for mid-market businesses to leverage cloud technology to improve processes, get better insights into their businesses, and improve profits. With Quickbooks Online as an established accounting core for the growing and ever sophisticated app ecosystem, it has become more and more simple and advantageous for firms to expand their services to mid-sized clients. Many firms are moving in this direction, and benefiting from the expanded revenue and profit potential. This keynote will introduce some of these benefits as well as critical things to consider when rolling out these services.

Learning Objectives:

- How to expand your services/revenue potential by doing what you are already doing with Quickbooks Online, but targeting mid-market
- How to provide advisory to mid-market and how it differs with small business clients
- How to deal with common objections during the sales cycle

Speaker: Helina Patience
Who Should Attend? Accounting Professionals who plan to offer or currently support small business clients using QuickBooks Online
Prerequisites: None
Delivery Method: Group-live Internet
Field of Study: Non-Technical - Business Management & Organization
Course Level: Beginner
Course Length: 60 Minutes
Recommended CPE: 1

Demystifying Advisory

QuickBooks ProAdvisors are powerful curators of a treasure trove of client information, and they can provide deep, high-impact, and data-driven insights into their clients' businesses. However, if you are like most ProAdvisors, you find it difficult to embrace advisory services because your clients aren't receptive to the model, the learning curve is steep, or (most commonly) you are so busy with providing services you can't focus on adding advisory to your practice. This session will provide strategies for overcoming the internal and external challenges to moving into the advisory services.

Learning objectives:
- Explore specific types of services you can offer your clients
- Determine which services work best for each of your client's business model and operations
- Discover tools and solutions to quickly offer advisory services to clients

Speaker: Joe Woodard
Who Should Attend? Accounting Professionals who want to offer advisory services to clients
Prerequisites: Currently support clients using QuickBooks Online
Delivery Method: Group-live Internet
Field of Study: Non-Technical - Business Management & Organization
Course Level: Intermediate
Course Length: 120 Minutes
Recommended CPE: 2

Practical Pricing

With the automation and tools available in QuickBooks Online and 3rd party apps, providing bookkeeping and accounting services is more efficient than ever. Additionally, improvements to the platform allows for real-time tracking of financial data, making it easier to analyze and understand financial performance. This improved efficiency and availability of data makes hourly billing and old pricing models obsolete. Learn about new pricing strategies, the steps to take to create and value your services and strategies for implementing with existing clients.

Learning Objectives:
- Identify ways to add value to your services
- Learn how to create three choices for your services
- Understand things to consider when setting prices

- Discover tips for communicating with clients and handling objections

Speaker: Michelle Long
Who Should Attend? Accounting Professionals who plan to offer or currently support small business clients using QuickBooks Online
Prerequisites: None
Delivery Method: Group-live Internet
Field of Study: Non-Technical - Business Management & Organization
Course Level: Beginner
Course Length: 90 Minutes
Recommended CPE: 1.5

Introduction to Apps Advisory Services

This session is designed to introduce accounting professionals to the concept of offering app advisory services in their firms. It will cover topics such as the basics of understanding apps, what it means to be an App Advisor and how your clients and you can benefit from this offering.

Learning objectives:
- Defining apps advisory
- Understand the benefits of offering app advisory services
- Examples of firms offering apps advisory services

Speaker: Liz Scott
Who Should Attend? Accounting professionals and QuickBooks Online Certified ProAdvisors
Prerequisites: Currently support clients using QuickBooks Online
Delivery Method: Group-live Internet
Field of Study: Non-Technical - Business Management & Organization
Course Level: Intermediate
Course Length: 90 Minutes
Recommended CPE: 1.5

Advanced Conversions

Take the guesswork out of migrating advanced features such as inventory, payroll, and sales tax from QuickBooks Desktop to QuickBooks Online. This session will cover how to simplify pre-conversion, conversion, and post-conversion steps for a more complex QuickBooks Desktop file.

Learning Objectives:

- Review steps for simple conversion
- Learn to convert a QuickBooks Desktop file with Sales Tax
- Learn to convert a QuickBooks Desktop file with Inventory or Payroll enabled

Speaker: MB Raimondi
Who Should Attend? Accounting Professionals who plan to offer or currently support small business clients using QuickBooks Online
Prerequisites: None
Delivery Method: Group-live Internet
Field of Study: Non-Technical - Computer Software & Applications
Course Level: Intermediate
Course Length: 120 Minutes
Recommended CPE: 2

Deep Dive into QuickBooks Online Advanced

Deeply understand the features offered in QuickBooks Online Advanced and what differentiates it from other accounting solutions for growing, complex businesses.

Learning Objectives:

- Understand the different ways you can use Advanced to setup workflows and reporting for your clients to complete the tasks that matter faster
- Understand enhanced reporting, custom fields, custom user permissions, accelerated invoicing

Speaker: Erin Walsh-Dyer
Who Should Attend? Accounting professionals and QuickBooks Online Certified ProAdvisors
Prerequisites: Currently support clients using QuickBooks Online
Delivery Method: Group-live Internet
Field of Study: Non-Technical - Computer Software & Applications
Course Level: Advanced
Course Length: 120 Minutes
Recommended CPE: 2

Advanced Apps Advisory Services

Are you ready to improve your Apps Advisory service offering? In this session, learn how to create a business solution using App Stacks. We'll discuss the different types of App Stacks available and how to identify the type of App Stack that is best suited for your clients' business. We'll also cover how to search and evaluate the various apps that are available and how to create a strategy for implementing the App Stacks and for providing ongoing training and maintenance. Finally, we will discuss the importance of planning, implementation, and ongoing support to create a successful business solution that works for you and your team.

Learning objectives:

- Understand how to create a business solution using App Stacks
- Identify how to build App Stacks
- Understand strategies for searching and evaluating apps
- Best practice for implementing training and ongoing app maintenance

Speaker: Liz Scott
Who Should Attend? Accounting professionals and QuickBooks Online Certified ProAdvisors
Prerequisites: Currently support clients using QuickBooks Online
Delivery Method: Group-live Internet
Field of Study: Non-Technical - Computer Software & Applications
Course Level: Advanced
Course Length: 120 Minutes
Recommended CPE: 2