Accelerating Growth with Mid-sized Clients Using QuickBooks
Day 1 - October 11, 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 & Exhibit Hall Now Open 30 min
8:30 - 9:45am	9:30 - 10:45am	10:30 - 11:45am	11:30-12:45pm	**Welcome and Keynote:** **Accelerate Growth with Emerging Mid-sized 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 Now Open 15 min
10:00 - 12:00pm	11:00 - 1:00pm	12:00 - 2:00pm	1:00 - 3:00pm	**Session 1: How to Grow and Accelerate Your Advisory Services** **that Actually Make an Impact** Trainer: Helina Patience (120 min) 2 CPE
12:00 - 12:15pm	1:00 - 1:15pm	2:00 - 2:15pm	3:00 - 3:15pm	Networking Lounge & Exhibit Hall 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 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 - October 12, 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 & Exhibit Hall Now Open 30 min
8:30 - 10:30am	9:30 - 11:30am	10:30 - 12:30pm	11:30 - 1:30pm	**Session 4: Conversions to QuickBooks Online Made Easy** 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 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: Bryce Forney (120 min) 2 CPE
12:45 - 1:00pm	1:45 - 2:00pm	2:45 - 3:00pm	3:45 - 4:00pm	Networking Lounge & Exhibit Hall 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 HallNow Open 20 min

Intuit quickbooks.

Accelerate Growth with Mid-sized Clients Using QuickBooks

October 11-12, 2023

Accelerate Growth with Emerging 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

Capitalize on Advisory Services to Unlock Growth For Your Firm

We know that the market is driving the demand for advisory services. Businesses have been severely tested over the last few years, and their owners are leaning on their accountant and bookkeepers more than ever to assist with strategy and execution help. If you've been a compliance focused provider, have no fear, this session will provide you with the practical playbook on the structures and tech to get you started and expanding your advisory services. You'll learn practical ways to niche, and how to go well beyond reporting when it comes to advisory: you'll learn how to actually help your clients grow their businesses while you grow yours.

Learning objectives:
- Determine which structures and technology to get started
- Learn practical ways to niche
- Understand how to bring value and impact to your clients

Speaker: Helina Patience
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

Conversions to QuickBooks Online Made Easy

Take the guesswork out of migrating advanced features such as inventory, payroll, and sales tax from QuickBooks Desktop to QuickBooks Online. This session will discuss different methods of conversion, along with converting from QuickBooks Desktop to QuickBooks Online using the conversion tool. It will delve into pre-conversion, conversion, and post-conversion steps for a more complex QuickBooks Desktop file.

Learning Objectives:

- Review steps for a 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

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: 00 Minutes
Recommended CPE: 1.5

Deep Dive into QuickBooks 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: Bryce Forney
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