



Scott Gregory QuickBooks® Expert

Put Scott's 30 Years of Experience to Work for You

Looking for Help with QuickBooks?
Here Are 7 Secrets to Hiring the
Right QuickBooks Consultant

Presented by:

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“I wanted to take a minute to sincerely thank you for the work you’re doing with QuickBooks—the one-on-one training, webinars, fighting our battles with Intuit, and hosting a fantastic blog that is always very helpful. I’ve worked with QuickBooks for about five years and I’m still learning new things. Your approach with people and groups is effective and we appreciate it. You are a valuable resource to me, and I’m sure to many others. We appreciate you and your work! Please keep up the wonderful work you do.”

– Pam Jimmerson



IT’S TIME TO CRUNCH THE NUMBERS...

DOES QUICKBOOKS LEAVE YOU
SEARCHING FOR ANSWERS?

How can a program that’s supposed to be “quick” feel so frustrating?

- o You’ve tried to get help from an expert before and wound up even more bogged down with bookkeeping stress.
- o You need to sort out and reorganize a QuickBooks file you inherited from a former bookkeeper or accountant.
- o You just need someone to look over your shoulder to help you figure out a few functions that will make your life easier.

Help is on the way—if you hire the right person to support you. A quick rescue act just isn’t fair. Who’s going to stick around to make sure systems run smoothly?

Get an edge on hiring a QuickBooks consultant who understands your business needs AND can tailor a solution and stick by you to ensure results.

Scouting Out a Consultant?

Time is your most valuable asset. Spend it wisely by partnering with a QuickBooks consultant who understands your needs and tailors solutions to fit your business.

7 Secrets to Your Success

Here are some insider tips so you can find an expert who will deliver results and save your sanity.

Scott Gregory *QuickBooks*® Expert

“Your training has literally revolutionized the way we run things here. Everyone in our entire company- from Customer Service, Purchasing, Marketing, Shipping to Management has benefitted greatly from what you have taught us! I couldn’t recommend your expertise more- I would tell any Quickbooks user that a session with you is mandatory. The ROI is literally 50 fold for our company.”

– Victoria Marquardt

Applied Home Healthcare Equipment



SECRET #1: Your accountant doesn't know your QuickBooks.

What? Every accountant knows QuickBooks, right?

Well—that depends. CPAs know what they need to get out of QuickBooks, not necessarily what you need from the software to successfully run your business. Your CPA posts journal entries and runs trial balances. “What about handling estimates, sales orders and inventory,” you ask? Don’t be surprised if you get a blank stare.

There are two “versions” of QuickBooks. The one your accountant knows to get the taxes done; and the one you need to run an efficient, profitable, successful business.

Look for an expert who understands the tools and modules in QuickBooks so you can get helpful information from the software. Beware of the blank stare, or “I think…” responses to your questions about QuickBooks. Hire someone who can talk about QuickBooks and your business.

SECRET #2: Street Smart Beats Book Smart.

We’re talking about numbers. Ask how many QuickBooks clients the consultant has served. Choose someone with experience working with many businesses of different sizes in different industries.

A consultant who gives textbook answers might sound smart. Don’t be fooled. Many businesses need more than a tweak or two to the typical software to meet their needs. A QuickBooks expert can share real-world successes and offer examples of ways a problem could be handled.

Ask for examples of the consultant’s work. Request (and call!) references. Find out how well the consultant knows your industry. You can’t know it all, but a strong network goes a long way.

For example, I rely on an experienced virtual team to help with complex requests from non-profits, retail or construction businesses. That way, I can focus on manufacturing, distribution and service businesses (HVAC, plumber, electrician) that are the core of my practice.

“Scott is great to work with! He listened to our needs and communicated clearly at a pace that enabled us to digest and understand what we were seeking to understand. We appreciated his follow up emails with a summary of our call as well as a to-do list for both us and himself. I would highly recommend his services if you are looking to get a better handle on Quickbooks and maximizing it’s capabilities.”

– Christine Harvey
Out of the Box Marketing

SECRET #3: Seek Out Certification.

You want a street smart consultant with high-class credentials. But what credentials are legit? Seems like there’s a certification for everything these days. Here’s a cheat sheet:

- **QuickBooks ProAdvisor:** This popular designation has little substance. It means the consultant paid a fee to Intuit (the QuickBooks creator) for the title. There are no guarantees that this ProAdvisor knows anything about applying QuickBooks to your business.
- **Certified QuickBooks ProAdvisor:** So, the consultant paid a fee to Intuit and passed a test. But that test does not measure how to apply QuickBooks to your business.

The consultant may know how every button on the program functions. But forget guidance on critical business issues. Because this consultant passed the test, he or she is listed in a Certified ProAdvisor database of 20,000-plus individuals. It’s another title, but no real proof that the consultant can apply QuickBooks experience to tailor solutions for your business.

- **Advanced Certified QuickBooks ProAdvisor:** This is the highest level of certification in the ProAdvisor program. Consultants with this badge are tested extensively on QuickBooks knowledge. You’ll find a mess of advisors with this certification if you search online, and they are highly qualified. They are also willing to dedicate time to perfecting answers to pass a standardized test. Remember, a piece of paper does not replace feet-on-the street time.

Many pros with this level of experience prefer to spend their hours working directly with clients rather than practicing for an exam. Personally, I’d rather give my smart QuickBooks answers to you than a grading system. Some examples:

- **Online QuickBooks resource.** I maintain a [QuickBooks blog](#) that has been viewed more than 1,000,000 times since it was created in 2008. It helps countless businesses succeed using QuickBooks.
- **Guides and tutorials.** I produce practical, free tutorials on a variety of functional topics offered on my [website](#) and [YouTube](#) station. Certification is a smart way to weed out consultants at first - but for a pro who can actually tailor QuickBooks to help your business run better, look for hours in the field working with clients.



“Once again, thanks for your expertise and guidance. You’ve been most helpful.”

– Mary Bondy

Eileen M. Burkhart & Co., LLC

SECRET #4: Do You Speak the Same Language?

As if deciphering QuickBooks wasn’t difficult enough... now you have to learn accountant speak? Every profession has its own dialect. Skilled consultants speak your language to help you understand how to use the software.

We understand your focus is running your business. Connect with a consultant who meets you where you are—who works to understand your business and helps you navigate QuickBooks without all the technical lingo.

SECRET #5: You Get What You Pay For.

You’ve heard this before. If you go with the lowest cost, you’ll get run-of-the-mill results. It’s similar to buying an overstock item at deep discount, or ordering a customized product. If all you care about is price, you could actually end up paying more for that “cheap” solution because you have to keep buying it again and again. (It never quite works!)

You’ll find QuickBooks billing rates all over the map. And you can get offshore help for as little as \$20 per hour (good luck with translation!). Other billing rates reach \$200 hour. So what is the cost of QuickBooks help? There’s no real answer.

A savvy consultant can share a shortcut or unlock a new, better way to approach handling your business accounting. That means less time you have to spend on accounting and more time you can dedicate to revenue-producing activities.

Scott Gregory QuickBooks® Expert

“What makes Scott Gregory unique amongst the QuickBooks Experts we have hired, is his very practical approach to tailoring QuickBooks to our needs. His very in-depth knowledge of the “inner workings” of QuickBooks has transformed our operation in a very short time. He covers in an hour what takes others many, and has made our operation smooth and stress-free through clever short-cuts. He has made it simple to use, and has showed us how to avoid issues in the future. In just a short time with Scott, he has made something which appeared daunting and difficult to use, simple and effective.”

– David Marcarian
MyoVision



SECRET #6: Make Sure the Consultant Plays Nice.

Your accountant and/or IT group are critical team members. A QuickBooks consultant should be a bridge between you and the outside accountant and/or computer support group.

You do not want a consultant who acts as the “only solution.” You want to keep the great relationship you probably have with a CPA—the QuickBooks consultant should be an additional resource, not a competitor.

Ask how the consultant will coordinate with your CPA and/or IT team. If you are looking for a new accountant, keep that discussion separate when seeking out QuickBooks consulting services. (Remember, not all CPAs know QuickBooks!)

SECRET #7: Who Talks More: You or the Consultant?

The consultant should listen to your situation, ask clarifying questions and work to understand your goals and objectives. Think twice if all you hear on the other line is “blah-blah-blah-certification-blah.” (This is supposed to be about you, after all!)

A good consultant will take the time to excavate beyond the surface issues you present. For example, a client tells me he wants to ditch his chart of accounts because it’s not working. I dig deeper and learn that what he really wants is profit and loss by department. That realization leads to a totally different solution.

Make the Right Choice!

Remember to consider these 7 Secrets as you search for a QuickBooks consultant. (I bet some of the tips surprised you!) While no consultant will have all the answers immediately, the right pro will ask thoughtful questions and dig deeper to learn about your business. An experienced professional will help you understand where you are today and where you could be tomorrow.

Much success—

Scott Gregory
QuickBooks® Expert

Scott Gregory QuickBooks® Expert



“It is wonderful to find someone as knowledgeable and personable as you to help with our QuickBooks problems.”

– Kathi Potts, Office Manager

Coastal Diamond

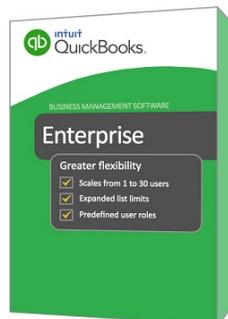
Checklist for Selecting a Consultant

Time to compare apples to apples. This handy checklist will help you evaluate QuickBooks consultants so you can make a smart choice for your business.



	Scott Gregory, QuickBooks Expert	Consultant B?	Consultant C?
✓	18,000+ hours of hands-on, field experience with QuickBooks		
✓	Over 850 clients served		
✓	Specialties: Manufacturing, Distribution, Service Businesses		
✓	Publishes leading QuickBooks blog – over 450 people per day visit for tips and tricks		
✓	Provides free QuickBooks guides to educate QuickBooks users		
✓	Charter Member of Intuit Premier Reseller Program for QuickBooks Enterprise (since 2004)		
✓	Former CFO for multi-million dollar business – understands accounting, IT, inventory, purchasing and banking/finance		

Contact Scott Today
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