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**Randy Johnston** • Oct. 06, 2011

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Now that extensions are behind us, and we are helping clients with tax planning, some of you are beginning to look ahead to the coming year and your own personal and business plans. Although a single article won't necessarily help you build an entire business plan, a few ideas that are incorporated and well executed could make a world of difference for your firm and your clients.

Forecasts show outsourced CFO and controllership growing quite profitably and

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programs that have been developed by software publishers could be a great help to you.

## What do these programs offer?

Common elements of all of these programs include the following:

- focusing on how to help the accountant deliver better services to their client base
- reduced costs to the firm itself
- training that is often in the form of free CPE
- exclusive content for program members
- more advanced technical support (frequently included)

Many of your competitors will not take the time to train partners, managers and staff on the products offered in these programs. You can craft recurring revenue programs to your firm that are not based on compliance, but rather on services that businesses really want help with. You can add a great deal of value by bringing your accounting expertise to bear and leveraging a number of the offerings.

## What types of programs are available?

Areas covered by such programs include Sales and Use Tax, Accounts Payable processing, Expense reporting, Invoicing, Accounting, Document Management and Customer Relationship Management (CRM). Most of the key issues for small to medium businesses are directly addressed by the offerings in the programs. As a side benefit, many of the products are “cloud” SaaS offerings, so the products run through a web browser, have no local software to install and allow you as the accountant to look at the same information as your client, usually without any licensing fees. Most of the programs have an “eat your own caviar” approach where you can run the same application in your firm that clients are using in their own businesses. Further, if you need the data from a client, you can have access without cumbersome file transfer.

# What programs should you consider?

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## • Intacct Partner Program

- QuickBooks ProAdvisor Program
- Results Partner Program
- Sage Accountants Network
- SmartVault Affiliate Program

We know that other publishers are developing programs that you should consider when they are introduced, and urge you to keep an eye out for these high-value additions to your practice. This website reference list is updated on a regular basis, removing programs we no longer believe are effective and adding new programs that have merit. We expect a number of new offerings in the coming year based on what we see being developed, but that information is not yet public.

## What do your clients want & need?

Beyond these well thought out offerings, consider what your client base is requesting from you for new services. There are opportunities all around IF you will take advantage of them. You may be comfortable in tax or audit, and those services are needed, too. However, it is becoming clear to me that businesses are getting the advice they need whether it is from someone they can trust like their accounting firm or from consultants or sales teams that may not always have your clients' best interests in mind.

## Looking to drive client services to a new level?

Further, some of you are looking for a change of pace. You have done the same thing for so long, that it is neither interesting nor challenging? Wouldn't you like to have a new interest that drives your client to want you around and to pay you for more services? If you are comfortable or think you are completely serving your market, I'm very happy for you. If you'd like to do more for your clients, take the time to review

these programs and determine which ones should fit into your plan. You'll be pleased

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