From the June/July 2008 Issue

The Best Consultants Take Control Of The Whole System

In this ever-changing world of technology and solutions in the small business accounting world, it's natural for consultants to be overwhelmed by all the vendors in the market who claim to have the best solution in their market space. If you're like most software consultants, you're constantly flooded with pitches from vendors about their new products and solutions. With all of this "noise," staying "smart" about what's best for your clients is a never-ending challenge. But I have some questions for you. When you think about your typical client, considering their staff's skills in the area of accounting software, systems and technology, how would you answer these questions?

Who is the **best person** to help make the right technology decisions for the client?

Who **knows more** about the available solutions in the market?

Who is the **best judge** of how appropriate each solution is for the client's business?

Who has the **depth of understanding** of the functions of your client's business?

Who **knows the most** about how their workflows affect and are affected by software solutions?

charge in such a way as to become the decision maker (or at least have direct influence with the decision makers) for what, how and when products will be used by the client's business. And I'm not just talking about which version of the accounting product will be used, or which chart of accounts to use. I'm saying the consultant must take responsibility for the ENTIRE system, including all add-ons, the web store interface, the payment gateways, the online payroll, the remote timesheet data entry, and any other LAN or web-based applications that feed data to the accounting system.

If you don't have complete command over all of these systems and how they interact with each other, and with the General Ledger, you will almost certainly have trouble, probably sooner than later. Most likely, the client will expect you to have prevented whatever problem occurs.

I recently learned of a situation that underscores what can go wrong when the consultant doesn't assert him or herself across the complete system of the client. This consultant is a true QuickBooks expert, but he is not familiar with or skilled in solutions for the rental equipment business (which represents about 25 percent of the client's business). Therefore, when the client asked for advice on what software to use for their rental business, instead of researching the problem and gaining the needed expertise to help the client fully, the consultant recommended a vendor and suggested that the client check out the product on their own.

Since the client trusts this consultant implicitly, having built a strong relationship over the past several years, the client naturally thought that because the consultant made the recommendation, the vendor would have the right solution for their needs. The vendor salesman, upon learning that the QuickBooks consultant referred them, naturally assumed that their product was a good fit. Otherwise, the

that their product is the "right fit" instead of just a "force fit" solution, but you can see why that didn't happen in this case.

And you can see why, in general, vendor salesmen are incented to make sales however they can rather than doing everything they can to discover a bad fit. Simply put, their job is to sell. The consultant's job is to ensure a good fit between vendor product and client need. Advance the clock forward a few weeks, and you have the product sold, installation in progress and, finally, the client starts seeing how it really works and starts to panic.

"This isn't going to work for us," they say, and they begin to wonder what they've gotten themselves into. They've already spent tons of money, time and staff frustration trying to get this new system up and running, and now they're realizing that the solution simply doesn't fit their needs, and it never should have been recommended in the first place.

At this point, the client is seemingly beyond the point of no return, and now they're looking for someone to blame for their misfortune. If not blame, they certainly are looking for help to unravel this disaster, and they almost certainly don't have the skills on staff to figure the right way out of the problem. Hopefully, you're getting the picture here. So let's ask a few questions again based on what you've heard about this story:

- Should the consultant have recommended the vendor at all?
- Should the consultant have stayed uninvolved in the implementation, even though he is the main accounting software consultant for the client?
- Should the vendor salesman have done more to disqualify this prospective sale?
- Who is to blame for this disaster?

A) The Consultant, B) the Vendor, C) the Client, or D) a mixture of all of

a) keep the systems running smoothly,

b) recommend the right solution for improving the system, and

c) be there to support the client and resolve problems that are bound to occur from time to time.

The whole point here is that, in order to deliver your services in a truly professional way, you must assert yourself with each of your clients. First, and most importantly, you must develop trust with your client; and then, once you've gained their trust, you must take control of your job and make sure you have complete involvement in every aspect of software, hardware and implementations that affect the overall system.

Clients hire you because they don't have the skills to do what you do. So go out and give them what you signed up for. That means you'll forever be schooling yourself in new technologies, software solutions and best practices for implementations. You're already doing part of the job by reading about new products and trends in *The CPA Technology Advisor*, but make sure you drilldown on the learning by attending conferences, webinars and vendor demos to make sure you stay on top of what's available to help streamline your clients' businesses.

At the end of the day, the buck stops with you, but consulting is one of the most rewarding jobs in the world. So enjoy the ride. Oh, by the way, I never have found a good software solution for rental equipment, so if you know of one, send me a note so I can tell the consultant and hopefully put them on a road to recovering the situation.

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us