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Doug Sleeter • Dec. 01, 2009

From the December 2009 Issue

For all of you who are in the business of consulting, in addition to accounting services, the month of December is the calm before the storm. As you wrap up 2009 and make your plans for next year, it's a good time to pop up a few levels and look at where you add value in the world. Think about your business, your clients and the vendors with whom you work, and focus on your core values ... and on what drives your success.

Recently, Jeanne Tarazevits, a member of [The Sleeter Group Consultants Network](#), posted to our forum about how her perspective has changed as her practice has grown over the years. Here is what she said, followed by my response to her:

Jeanne Tarazevits:

I've found the last few years to be transformative. I can only speak to my own experience, but I hope the following will be informative and educational.

I categorize my QuickBooks experience in the following stages:

- **QuickBooks Accountant**

Intimate relationship with small clients – Characterized by training, some bookkeeping for small enterprises, lots of QuickBooks clean-up projects.

- **QuickBooks Consultant**

Intimate relationship with larger clients – Looking for best solutions for client; less involved in everyday transactions; client has some

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~~Selling solutions that address specific needs of clients may not even be~~
engaged by the client to provide consulting because they may have in-house
house
people, or a different outside consultant.

As my practice has moved through these stages, my perspective has changed.

For example: As a QuickBooks Accountant, I found QuickBooks Enterprise (QBES)

to be way too expensive – as did my clients. As a QuickBooks Consultant, I was more inclined to recommend QBES and recognize its value. In the Mid-Market, it's a must, and as a VAR I now see QBES as incredibly inexpensive.

I've also realized with these changing roles, my perspective on what's appropriate has changed. I recently criticized someone who had graduated to

the VAR level of our group for selling the wrong solution to clients in my area. But in all fairness, I've probably done the same thing. I now have folks who call and describe their situation over the phone. Based upon client-provided information, I propose solutions, I demo solutions, and the clients make a buy/don't buy decision. I'm not acting as a Consultant in these situations because I haven't been to their shops, and I don't know their businesses intimately. I'm just offering up ideas based on what they tell me, and they make the decision.

It's a matter of perspective.

My Response:

Thanks for helping us all think about the different perspectives we each

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I remember a time when I was working with a developer to resolve an issue one of our consultants had with their software and how it forced the client to completely change their QuickBooks setup. At one point in the conversation,

this developer (a marketing guy) said to me “Your consultant is telling the client to use QuickBooks ALL WRONG.” I pondered that for a minute and responded that I had long ago stopped saying any particular QuickBooks

setup was “ALL WRONG,” because although there are many “best practices” that we have developed and teach with fervor, I fully recognize that any particular solution depends completely on the context of the situation.

For example, even though the QuickBooks Customer:Job list is designed to track customers and the jobs that are performed for that customer, there are several ways to make use of the Customer:Job list to serve a particular business

con-text. In some cases, we use the Customer:Job list to have separate jobs to track “phases” of projects, but since the estimates/invoices form only allows you to have a single Customer:Job on one form, many people use Items for job phases.

So in this tiny example, you can see how one client might INSIST that they have all job phases showing on the estimate, while another client may be able to produce estimates using Word or some other method. If the client INSISTS, we have no choice. So how can anyone who later looks at the system

declare

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get a complete demo, and understand if there are any requirements for how QuickBooks is used in order for the add-on to work.

Anyway, as you so clearly state, there are also many different perspectives we all take depending on what role we're asked to play. Along with each role, we take on very different perspectives, and it's quite possible that we will make different recommendations.

I think the key to all this is that we must ALWAYS keep the client's best interest foremost in our minds. If we imagine ourselves in the role of the client CEO/Owner and then work back from there to the right solutions/recommendations, then I think we'll succeed with much greater frequency.

Anyone who forgets that their success depends on the client's success will very soon find fewer clients and less success.

As many of you go down the VAR path, you do take on additional responsibilities and commitments (to the developer partner), but the client MUST be first always. At The Sleeter Group, we do a lot of "expectation setting" with developers to help them understand the role our members play. On the one hand, each of you has great influence on what clients will buy; but on the other hand, you cannot ever be put in the position to sell anything that you don't completely believe is in the best interest of your clients.

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