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Which Accountant Programs Are For You?

Many companies offer significant discounts and benefits to accounting firms so the firms will recommend their products and services to their client base.

Randy Johnston • Mar. 03, 2012



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Personally, I try not to be lazy, but philosophically, I do not like to waste time, money or effort. Perhaps you have a similar attitude about these three items. Conserving time, money and effort in addition to getting benefits of superior technical support as well as marketing are among the key reasons you should review your eligibility for programs targeting tax & accounting professionals.

Many companies offer significant discounts and benefits to accounting firms so the firms will recommend their products and services to their client base. Some of the programs represent simply a “free account” for the accountant, while others offer thousands of dollars of savings, special support queues, product training, and other

benefits. For a complete listing, you can visit our resource at www.cpafirmsoftware.com/cpaprograms.html. To name a few of the alternatives in the market, consider:

- [Avalara Accountant Advantage Program](#)
- [Bill.com Accountant Program](#)
- [Concur Advisor Program](#)
- [FreshBooks BeanCounters United Program](#)
- [Intacct Partner Program](#)
- [QuickBooks ProAdvisor Program](#) – Call 888.250.7279 and use Discount Code: C87403
- [Results Partner Program](#)
- [Sage Accountants Network](#)
- [SAP CPA Advisor Program](#)
- [SmartVault Affiliate Program](#)

A good rule to follow is to always join a vendor's accountant program if you use their product. The programs listed above are all good in their own right, and represent publishers of products that are worth adding to your strategy if you do not have a relationship with them today.

Benefits in most programs include:

- Use of their software for free or at reduced rates
- Access to special support lines that are usually not available to non-members
- Access to training, often for CPE credit
- Discounts on software that can be passed on to clients or used for extra margin
- Installation and support services
- Participation in the publisher's national conference
- Special installation methodology
- Practice Development aids

As most of us have learned, vendors often want to sell to our clients, not just our firms. Traditionally, we have tried to protect our clients from predatory sales practices. To our knowledge, the programs above are designed to help you service your clients better. There are often collaborative capabilities built into these products so you can work directly with your clients on their data. Often there is a client dashboard that has easy access from your firm to one or more clients. Examples of collaborative products include: Bill.com, FreshBooks, Intacct, and SmartVault. There

are other products that have client interaction as well such as AccountantsWorld PowerPractice, Paychex SurePayroll or Xero.

Vendors who have created these programs frequently update or modify their programs to add benefits, and rarely take benefits away. Certainly a winner in the benefit improvements category is Sage Software who has been adding more and more useful features to their program. Upper management had a recent discussion with me about what could and should be added to the program. You can expect Sage to add additional features in their accountants program based on their philosophy, strategy and respect for accounting professionals in public practice. The company is going to extraordinary efforts to improve their program and how they work with accountants. Read more for yourself at <http://www.sageaccountantsnetwork.com/>.

Another example of commitment to accountants is shown in the Concur Advisor Program at <http://www.concur.com/en-us/concur-advisor>. Concur includes their expense management solution for up to two users, four hours of free online CPE courses, unlimited support, and discounts for your clients. Most accountant programs are designed to improve client service, and this program is no exception. The reason we recommend most programs, though, are the benefits your firm can deliver to clients. For example with Concur, the client benefits include reduced time spent on expense reports, better tracking of employee spending, and reduced fraud risk.

A program that can help you grow your own practice by automating and controlling business development as well as growing your clients' businesses is the Results Partner Program. You can see details on this program at: http://www.results-software.com/Partner_Resources/Partners/. This software publisher has a Customer Relationship Management (CRM) product that integrates into Microsoft Outlook, QuickBooks, SmartVault, and Constant Contact. They provide installation services to help you get the product configured properly for your firm. This product is another great example of a product that you can use in your practice to track engagement opportunities. Clients can use Results CRM to produce quotes, manage sales pipelines and do more extensive business management. The Results CRM product extends your practice management product to properly track business development opportunities, and can be used stand-alone or to extend your client's QuickBooks installation to improve their customer service and sales capabilities. When a CRM product is used properly, it can improve both top-line and bottom-line dollars.

During 2012 you will see new programs introduced by even more publishers. The programs that will be introduced include products that you should use in your practice, and that you would pay for if they were not available in an accountant's program. Expect most of these announcements between April 15 and June 30, 2012. Consider and enroll in accountant programs that fit your strategy and needs.

[Bill.com](#) • [FreshBooks](#) • [Intuit, Inc.](#) • [Sage Software, Inc.](#) • [SAP Concur](#) • [Associations](#) • [Business Management](#) • [Practice Management](#) • [Product & Service Guide](#) • [Resources](#) • [Resources, Supplies & Services](#) • [Article](#) • [Community leadership](#) • [Networks](#)

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