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FIRM MANAGEMENT

Intuit Rolls Out Exclusive Benefits to U.S. QuickBooks ProAdvisors

At Scaling New Heights, Intuit announced a new partnership with ICBUSA, part of the Institute of Certified Bookkeepers (ICB), and Hubdoc.

Taija Sparkman • Jun. 17, 2016



Since introducing the concept of the Firm of the Future, Intuit has been working hard to empower accounting professionals to take their firms to the next level. With its latest partnerships, the financial management software provider wants bookkeepers to know – if they didn't already – they are a part of this movement as well.

At Scaling New Heights, Intuit announced they are teaming up with ICBUSA, part of the Institute of Certified Bookkeepers (ICB), and Hubdoc. ProAdvisors in the U.S. will receive 50 percent off ICBUSA application fees, membership fees and assessment fees.

In addition, ProAdvisors who are QuickBooks Certified or Advanced QuickBooks Certified will be able to “fast track” their membership level – saving both time and money. Hubdoc is offering a free VIP account for ProAdvisors and dedicated phone support and training, as well as an exclusive discount up to 20 percent off for six months to share with clients.

Collaborations such as these are not unusual for Intuit and underscore their commitment to providing the tools and resources accountants and bookkeepers need to successfully grow their practice. This commitment aligns seamlessly with ICBUSA’s mission to help bookkeepers get the education they need for success.

“We are really excited to team up with ICBUSA, as part of our ProAdvisor program. We are constantly trying to come up with new benefits to help ProAdvisors be a strategic advisor to their clients,” said Chris Hamilton, Global Leader of Intuit QuickBooks ProAdvisor Program. “At the same time, ICB wants to make sure bookkeepers are gaining skills and keeping themselves distinguished in the marketplace. It makes total sense for us to form team up and work together to uplift bookkeepers and accounting professionals.”

ProAdvisors who join ICBUSA will get credit for their QuickBooks certifications by skipping the student level and starting as an affiliate. QuickBooks certifications will help ICBUSA members move up ICBUSA ranks faster as the organization recognizes the skill and expertise required in becoming QuickBooks Certified and providing expert service to clients.

“We really feel that Intuit’s QuickBooks ProAdvisor program aligns with ICB’s mission for education and technology. Their focus on the Firm of the Future is great, especially when combined with the strong focus on education here at ICB,” said Jan Haugo, CEO of ICBUSA. “We are working hard to ensure bookkeepers know that ICB is a valuable resource that can help them get what they need. QuickBooks ProAdvisors are gaining access to a network of educational tools and resources that that will help them stay up-to-date without reinventing the wheel. We want to raise awareness of the many resources both Intuit and ICB offer for bookkeepers, such as mentorships and guidance.”

ICBUSA is dedicated to improving education for bookkeepers and making sure they are up-to-date on the latest bookkeeping and technology education. As such, the organization offers numerous online and in-person networking opportunities for bookkeepers to grow their firms and share best practices with their peers, as well as customizable templates. By being a member of ICBUSA, QuickBooks ProAdvisors can

access resources and advice to help them in a variety of areas, such as determining and narrowing down a niche market. Other educational resources and benefits include webinars, special pricing, software, discounts, insider access to industry news and events, content, videos and opportunities to work with industry leaders.

And while education is very important, both Intuit and ICBUSA recognize it is only one step in empowering bookkeepers to grow their firms. Professionals also need to keep a watchful eye on their own business to make sure they are keeping up with technology, industry trends and meeting business goals. Evaluating how their firm is interacting with small business owners is key to ensuring they are providing a valuable service and stepping into their role as a trusted advisor.

By working with ICBUSA to provide educational resources, Intuit also recognizes the need to adopt technologies that eliminate time-consuming manual tasks, such as Hubdoc. Hubdoc is already used by numerous accountants to easily aggregate data, like bills, statements and receipts, in one location. Hubdoc is the fifth ProAdvisor app partner, following Bill.com, Fathom, ReceiptBank and TSheets.

“We’ve heard from our ProAdvisors that Hubdoc makes it even easier to work in the cloud and eliminate manual entry and time spent chasing down data from their clients,” said Hamilton. “Hubdoc really shows how powerful the cloud is by eliminating tedious tasks and automating document management and data entry, fetching financial statements and allowing accountants to focus on serving their clients. So, it made sense to add Hubdoc to our partner program.”

As bookkeepers continue to evolve with their clients and the industries they serve, it’s important that professionals truly understand the three pillars of the Firm of the Future – getting online, becoming a trusted advisor and growing your practice. Professionals that fail to recognize their value and evolve with technology will find themselves being beat out by firms with credentials.

“Trying to figure out value pricing and how that fits into the Firm of the Future model can be a hindrance that stops a lot of bookkeepers from moving forward. Oftentimes, firms need to feel comfortable with the change taking place in the industry, and that’s where ICB comes in. We educate them on topics such as value pricing, and then help bookkeepers empower themselves and their practices to move forward,” said Haugo.

ICBUSA believes bookkeepers are trusted advisors for their clients’ day-to-day consulting and technology needs. Bookkeepers are responsible for ensuring firms are

on track with their business goals and taking advantage of the various technologies that will help them accomplish those goals. They help their clients navigate through the multiple technology choices available to them to determine the solutions that are the best fit for their business.

“Our ProAdvisor program is laser-focused on empowering accounting professionals and bookkeepers to be trusted advisors and grow their practice. The partnerships we have with ICBUSA and Hubdoc not only help bookkeepers transition from compliance work to becoming trusted advisors, but also encourage ProAdvisors to take their bookkeeping skills to the next level,” said Hamilton.

ProAdvisors can learn more and sign up for these exclusive benefits by visiting <http://www.icbusa.org/proadvisor> or <http://hubdoc.com/proadvisor>.

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