

How to use **the switcher toolkit**



Why QuickBooks?

This is an accessible one-pager that introduces your practice and clients to QuickBooks. It's a great summary of the benefits QuickBooks has to offer and is designed to kickstart the switching conversation.



Competitor battle cards

If it ain't broke, some clients won't want to fix it (even if it would be good for their business). Competitor battle cards are designed to provide punchy talking points on QuickBooks' biggest competitors and can be used mid-conversation.



Case studies

Sometimes it's hard to visualise how a new system can benefit you. Our selection of case studies can be shared with clients and show just how QuickBooks has helped SMBs improve their operations.



Migration timeline

Migration can be a big barrier for your clients, especially if they're unsure how long it will take and what support they can expect. This timeline visualises the process and helps settle concerns.



COMING SOON

Step-by-step switcher guide

This step-by-step guide is designed to take the mystery out of migration with QuickBooks. Part explainer, part helpful guide, this handy PDF should have everything to get your clients up and running.



COMING SOON

Client onboarding email cadence

Your day-to-day workload is enough without having to think up a switch campaign. Instead, our email cadence is here to help you introduce and onboard clients to QuickBooks the easiest way possible.

Why QuickBooks for your clients and practice?

Want more from your accounting software? Our solutions are easy to use and all backed by affordable prices with no hidden fees or charges.

Plus expert product help from real people 7 days a week,* and **FREE 1-on-1 client onboarding**.

Benefits for your practice

- Reimagine how you and your clients work together. The Intuit platform puts AI and trusted human experts by your side helping you prioritise most important work while staying in control.
- Experience better firm and client management with the new Intuit Accountant Suite. Get access to enhanced tools that simplify managing your entire client portfolio at scale.
- Unlock cost savings for you and your clients. Benefit from a **FREE QuickBooks Advanced licence** and access to payroll for your own practice. Plus, **50% off client subscriptions** and access to discounted packages on all plans.

Benefits for your clients

- Simplified compliance with QuickBooks' MTD for Income Tax functionality and powerful AI automation, all in one place.
- Whether your clients work in an office, on-site, or from home, cloud-based software means QuickBooks can be used anywhere, anytime.
- Clients planning to scale their business? QuickBooks offers a diverse range of plans designed for every stage of their growth journey.
- You and your clients get access to expert product support available 7 days a week* via phone, live chat and screen share.



“ QuickBooks has made it so much easier for me to communicate the numbers to my clients. It makes it really easier for them to see what's happening with their business.

Ria-Jaine Lincoln, The Beauty Accountant

* Phone support available 8.00am - 7.00pm Monday - Friday or live message 8.00am - 10.00pm Monday to Friday, 8.00am - 6.00pm Saturday & Sunday.

QuickBooks case studies

See why other accountants and their clients choose to switch to QuickBooks



Discover why over 6.5 million subscribers worldwide choose QuickBooks as their accounting software with our selection of case studies. We'll take a closer look at how QuickBooks has helped accountants deliver better value and outcomes for their clients by switching them from other providers.

Page 3: Strengthen your practice by switching from Xero

Learn how Dan Ryder from Level Accounting streamlined his practice operations and reduced clients' costs after switching from Xero.

Page 7: Smarter automation, stronger client relationships

Moving customers from Xero to QuickBooks meant WestCotts could deliver richer functionality and stronger client outcomes. See how they did it with this case study.

Page 11: Growing a business with the right tools

Learn how a Garden Design company used QuickBooks to boost both their creative practice and financial foundations.

CASE STUDY #1

Why **Level Accounting** chose **QuickBooks**

Level Accounting is a Bolton-based firm founded by Dan Ryder, specialising in supporting small businesses - particularly in the construction and trades sectors.



The firm provides a full range of services, from bookkeeping and payroll to tax returns and financial planning. With a strong focus on value and efficiency, Level Accounting helps clients stay compliant while building financially sustainable businesses.



The challenge

As a former IT professional, Dan prioritises efficiency and simplicity. However, his previous software setup with Xero was becoming increasingly misaligned with both his firm's needs and those of his clients.

Rising costs and feature-heavy plans meant many small business clients were paying for tools they didn't use.



"Our ethos is to give good value for money... the strategy didn't align with our market anymore,"

At the same time, upcoming Making Tax Digital (MTD) for Income Tax changes were set to increase complexity for his client base - so it was essential to adopt a solution that was both cost-effective and future-ready.

Why Level Accounting chose **QuickBooks**

QuickBooks provided Level Accounting with a more flexible, scalable solution tailored to the needs of small businesses.

A key advantage was flexible pricing, allowing Dan to match software features to each client – avoiding unnecessary costs while maintaining functionality.

QuickBooks also stood out for its readiness for MTD, giving Dan confidence that both his firm and clients would be prepared for upcoming changes, and the software would be compliant with the new requirements.

Equally important was the level of hands-on support. With guidance from the QuickBooks team and tools like Move My Books, the firm was able to plan and execute a smooth transition.

“It feels like a partnership... when I call, I get answers and real support.”



“We’re already saving money because we’re not paying for features clients don’t need”



Results

Since moving to QuickBooks, Level Accounting has successfully migrated nearly 100 clients - demonstrating how quickly and effectively the transition can be achieved.

The firm now benefits from improved cost control, greater flexibility, and a platform that aligns more closely with client needs.

Clients gain access to straightforward, easy-to-use tools, while Dan and his team are better equipped to support them through upcoming regulatory changes like MTD.



"We've proved that in a practice like ours, we can move quickly,"

A seamless path forward

For **Level Accounting, QuickBooks** has enabled more than just a software switch.

By combining intuitive technology with dedicated accountant support, the transition process is straightforward and well-managed. Clients can move with confidence, knowing they're backed by both expert guidance and a platform designed for their needs.

The result is a more efficient, future-ready practice - and better outcomes for every client they serve.

CASE STUDY #2

Why leading accountants like **Westcotts choose QuickBooks**

Smarter automation, stronger client relationships



Westcotts is a UK Top 50 accounting firm with over 30 years' experience supporting businesses across Devon and Somerset. With 16 regional offices, they work with a wide range of clients - from growing SMEs to agricultural businesses - delivering tailored advice backed by deep local knowledge.



Despite their scale, Westcotts is known for its partner-led, personal approach. As Digital Advisory Lead Stuart Pedlar explains, maintaining strong client relationships is central to everything they do – even as they evolve their technology to better serve clients.

The challenge

As digital adoption accelerated, Westcotts needed a solution that could scale with both their business and their clients. Existing systems lacked the flexibility, automation, and cost efficiency required to keep pace with growing expectations.

They were also looking for a platform that was intuitive for clients to use, while enabling their teams to deliver more proactive, insight-led advisory services.

Why they chose QuickBooks



"We're getting better capabilities for less. It's just smart business and a straight win"

QuickBooks Ledger, alongside QuickBooks Online and Payroll, provided a connected ecosystem that streamlined key processes like VAT filing and Open Banking. The ability to integrate tools and standardise systems across all offices was also a major advantage.

Migration was straightforward and efficient, supported by tools like Movemybooks. As Stuart recalls, the transition was completed quickly with minimal disruption – giving both the firm and its clients confidence in the move.

The results

With QuickBooks in place, Westcotts has transformed how it supports clients. Automation has reduced manual workloads, freeing up time to focus on higher-value advisory services.



“We’re not just fixing problems anymore – we’re preventing them,”



Clients now benefit from real-time financial visibility, enabling better planning and decision-making. This has been particularly impactful in sectors like agriculture, where businesses can now track performance daily rather than relying on year-end figures.

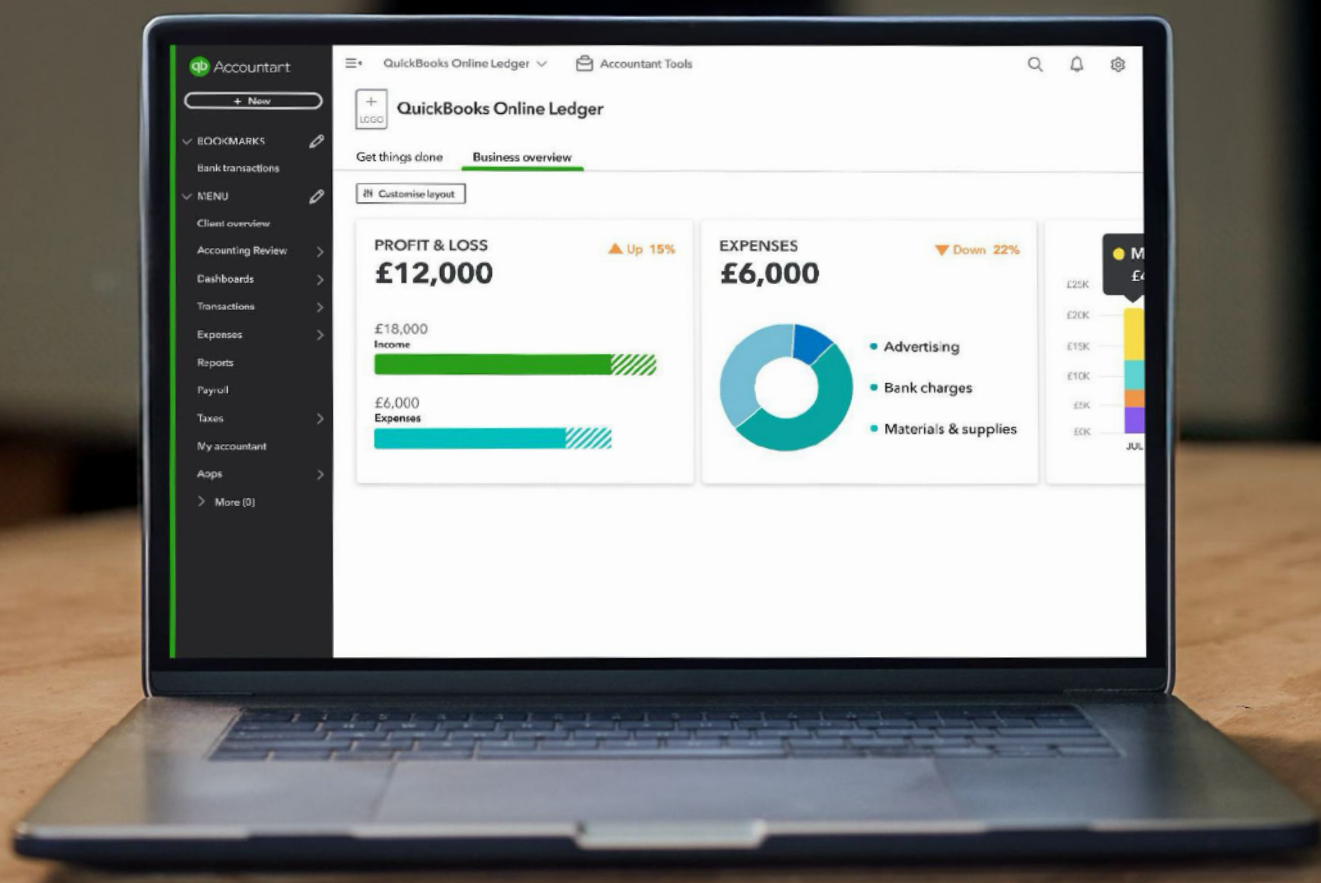
The platform has also enabled deeper insights, helping clients identify profitability across different areas of their business and make more informed strategic decisions.

A seamless path forward

For Westcotts, QuickBooks is more than just software - it's a foundation for stronger client relationships. By combining intuitive technology with expert guidance, they ensure clients can transition smoothly and start seeing value quickly.

The result is a more collaborative, forward-looking approach to accounting - where clients feel supported, informed, and in control.

As Stuart puts it, QuickBooks isn't just about compliance - it's about giving clients the tools and insight they need to succeed.



CASE STUDY #3

Growing a business with the **right tools**

Building a creative practice
on strong foundations



Dewlands Garden Design is a creative business - but to succeed, it needs to balance great ideas and innovative tools with a strong grasp of finances.

Working closely with Synergee Chartered Accountants, Dewlands rely on accurate, real-time financial data to support both day-to-day operations and long-term decision making.

As for Synergee? The goal is to help their clients adopt flexible, intuitive tools that make finances simple.



The challenge: limited visibility, inflexible tools



Before QuickBooks, we were using Xero, but it wasn't allowing us to choose the tools we needed on the operational side of the business."

Dewlands needed a system that could integrate seamlessly with the rest of their tech stack – supporting both creative workflows and financial management tasks. But limited flexibility made it harder to align creative and operational software with accounting processes.

At the same time, their accountants saw a broader challenge across clients: many systems lacked usability or didn't provide the level of real-time insight needed to support proactive decision-making.

Why QuickBooks?

The move to QuickBooks was driven by two key factors: user-friendliness and flexibility.

Synergee recommended QuickBooks as their preferred platform due to its intuitive design and ability to scale with client needs.

As they explain:



“When clients look at it and we show them what it can do and how it does it, they go, “okay I get that. That makes sense.” There are also hundreds, if not thousands, of third-party applications that integrate really smoothly”.

For Dewlands, integrations were a decisive advantage.

“The main benefit for us has been the integration with other software packages – it’s been pretty much seamless.”

From invoicing to reconciliation, processes became more connected and efficient. The mobile app also made a difference, enabling receipt capture on the go:

“If you're out on site and want to capture a receipt... well, there’s no excuse not to now.”



The results

With QuickBooks in place, Dewlands gained something critical and new: visibility.



"It's about visibility – you're plugging in all the transactions, and at some point, you've got to step back and see how you're performing."

"You couldn't really have those conversations without that visibility. Our business couldn't function without something like QuickBooks."

For Synergee, the benefits are equally clear. Real-time access to accurate data allows them to provide more proactive support:



Before QuickBooks, we were using Xero, but it wasn't allowing us to choose the tools we needed on the operational side of the business."

A seamless partnership

QuickBooks has strengthened the relationship between Dewlands and their Synergee, creating a shared, real-time view of the business.

This combination of intuitive software and expert guidance ensures a smooth transition for clients – adding value long after implementation.

Why switch from Xero to QuickBooks?

Summary

Looking for an alternative accounting software for your clients? QuickBooks offers a range of simple, smart accounting solutions that can help you take your clients' business to the next level.

P.S. Accountants can **save 50% off client subscriptions** and access discounted packages on all of our plans.

Xero's weak points

- Long wait times and difficulties reaching live assistance.
- No telephone line for assistance.
- Hidden fees and charges.
- Confusing processes around file management and search functions.

* Based on Trustpilot reviews from Xero customers. Reviews collected in March 2026.

QuickBooks strengths

- Free 45-minute client onboarding session and unlimited customer support.
- Help from real people 7 days a week* via phone, live chat, and screen share.
- Transparent pricing with no hidden fees.
- Streamlined workflows.

* Phone support available 8am - 7pm Monday - Friday; live chat 8am - 10pm Monday - Friday and 8am - 6pm Saturday - Sunday.






With Xero, getting help felt like jumping through hoops; I had to wait weeks for help. QuickBooks is different. It feels like they genuinely want to help us grow. When I call, I get answers and real support. *Dan Ryder, Level Accounting*

Solutions for every client

- **Sole Trader Plus** - Helps self-employed business owners and landlords.
- **Simple Start** and **Essentials** - Ideal for new and growing businesses preparing Self Assessment, managing VAT & Income Tax.
- **Plus** - Great for medium-sized businesses managing your business finances & team.
- **Advanced** - Built for complex businesses looking to boost efficiency and profitability. In-between basic accounting and ERP.

AI-powered automation

Intuit AI helps you and your clients save time on everyday bookkeeping while keeping human oversight and controls in place.

-  **Accounting AI** simplifies the day-to-day running of your client's business.
-  **Finance AI** analyses financial data, provides insights, and alerts you about deviations from plan.
-  **VAT AI** reduces manual reconciliation and increases confidence in your filings.

Powerful platform

With Intuit, you get access to an integrated ecosystem of solutions designed to help businesses grow revenue and profitability.

Enable better workforce management with QuickBooks **Payroll**. Get them paid faster with QuickBooks **Payments**. Recommend new ways to grow their business with **Mailchimp**. Seamlessly connect to Dext, Apron, Expensify, Chaser and **hundreds more apps**.

Why switch from Sage to QuickBooks?

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Sage's weak points

- Long wait times and difficulties reaching live assistance.
- Lack of product support.
- Unexpected charges.
- Slow, outdated, unreliable software.

* Based on Trustpilot reviews from Sage customers. Reviews collected in March 2026.

QuickBooks strengths

- Free 45-minute client onboarding session and unlimited customer support.
- Help from real people 7 days a week* via phone, live chat, and screen share.
- Transparent pricing with no hidden fees.
- Modern, cloud-based software.

* Phone support available 8am - 7pm Monday - Friday; live chat 8am - 10pm Monday - Friday and 8am - 6pm Saturday - Sunday.






When clients look at QuickBooks and we show them what it can do, they go, "okay, I get that; that makes sense." There are also hundreds of third-party applications that integrate really smoothly. *Darren Austin, Synergee Chartered Accountants*

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Why switch from FreshBooks to QuickBooks?

Summary

Looking for an alternative accounting software for your clients? QuickBooks offers a range of simple, smart accounting solutions that can help you take your clients' business to the next level.

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FreshBooks' weak points

- Long wait times and difficulties reaching live assistance.
- Slow response to reported issues.
- Hidden fees and charges.
- Confusing, unintuitive software that takes time to learn.

* Based on Trustpilot reviews from FreshBooks customers. Reviews collected in March 2026.

QuickBooks strengths

- Free 45-minute client onboarding session and unlimited customer support.
- Help from real people 7 days a week* via phone, live chat, and screen share.
- Transparent pricing with no hidden fees.
- Modern and intuitive user interface.

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With QuickBooks Advanced workflow automation for report approvals, payment reminders, and other processes, our clients can now improve overall efficiencies within their business. *Dr. Kamran Shaikh, Morgan Reach*

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Why switch from spreadsheets to QuickBooks?

Summary

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Spreadsheet weak points

- Takes up significant amount of time to set up, automate, and manage.
- Manual data entry can often lead to human error.
- Difficult to scale as your practice takes on more, higher complexity clients.
- Non-compliant with HMRC's Making Tax Digital mandate.

QuickBooks strengths

- Automated invoicing, bank feeds, reconciliation, and categorisation.
- Built-in rules, audit trail, and user roles to reduce errors and improve oversight.
- Cloud-native VAT and Income Tax functionality, plus automated checks.
- Real-time dashboards and reports providing fast visibility into business KPIs.






QuickBooks automation features save me at least 10 to 20 hours a week. This is crucial for a small practice like mine where every hour saved is valuable. *Christina Eggleton, Next Level Accountancy*

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Your 90 day migration timeline

Our 'white glove' onboarding process can be tailored to your practice and client needs to ensure you're set up for success, getting the most from your subscriptions and our partnership.

	Week 1	Week 2	Week 3	Week 4
Month 1 (0 - 30 days)	Sales introduction	Business review	Product/client alignment	Finalise purchase
	Product consultation			SDM onboarding intro
Month 2 (30 - 60 days)	Post sale consultation	Training programmes	Migration complete	30 day review
	Migration concierge* intro	Migration starts		
Month 3 (60 - 90 days)	Client onboard sessions	Training programmes	Feature deep dives	60 day review
	Always-on customer support available 7 days a week**			

Ongoing support at your fingertips

Certification and training. Delivered by accountants, who use QuickBooks on a daily basis, our certification programmes build confidence and capability in your team, whilst supplementary training is suitable for both partners and their clients.

Partner enablement. Our team of QuickBooks product experts develop a deep understanding of your practice and clients, and provide actionable plans that help you reach your goals, including workflow consulting, practice optimisation, and custom training.

* We partner with best-in-class data migration experts - Movemybooks and Dataswitcher - to ensure a seamless switch to QuickBooks.

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