

Buyer's guide: Is your client ready for enterprise tech?



As an accountant, part of your job is to guide your clients toward the best financial and operational solutions. Use this checklist to help you assess whether your client is ready to transition to enterprise-level technology like Intuit Enterprise Suite:



Business complexity

As businesses grow, they face increasing operational complexity. Consider Intuit Enterprise Suite if your client:

- Manages multiple entities or locations
- Handles intercompany transactions
- Requires multidimensional reporting



Growth indicators

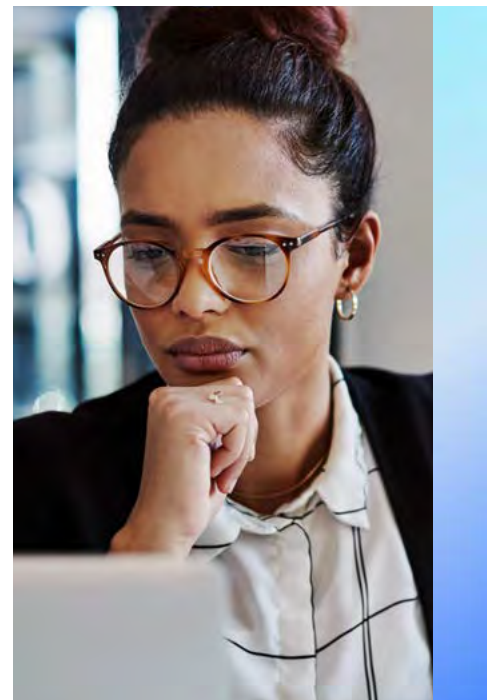
Rapid growth often necessitates more robust systems. Look for these signs and consider Intuit Enterprise Suite if your client is:

- Experiencing rapid year-over-year growth
- Planning expansion to new states or markets
- Increasing employee count

Financial management needs

Advanced financial needs may indicate it's time for an upgrade to Intuit Enterprise Suite if your client requires:

- Consolidated financial statements
- Advanced revenue recognition capabilities
- AI-driven financial planning and analysis tools
- Real-time dashboards and KPIs





Operational challenges

Your client's operational processes might benefit from Intuit Enterprise Suite if they are:

- Using several separate apps or systems to manage the business
- Spending significant time manually reconciling data
- Experiencing errors due to manual processes
- Struggling with infrequent or outdated reporting

Compliance and security concerns

As businesses grow, they often face increased scrutiny and security needs. Intuit Enterprise Suite is a good fit if your client is:

- Facing increased scrutiny from stakeholders
- Requiring enhanced security measures
- Needing role-based access controls or certification compliance





Project and profitability management

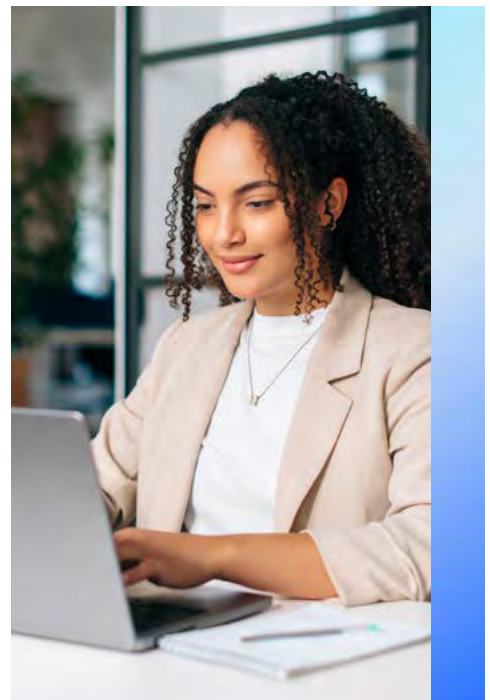
For businesses working on multiple projects, Intuit Enterprise Suite works well if they:

- Have difficulty tracking project profitability in real-time
- Manage multiple projects simultaneously
- Need to improve project estimation and budgeting

Cash flow and payment processes

Efficient cash management becomes increasingly important as businesses scale. Intuit Enterprise Suite can be a fit if your client needs to:

- Automate accounts receivable and payable processes
- Reduce time to get paid and improve cash flow
- Increase visibility into cash flow projections





Customer and engagement marketing

Growing businesses often need more sophisticated marketing tools.

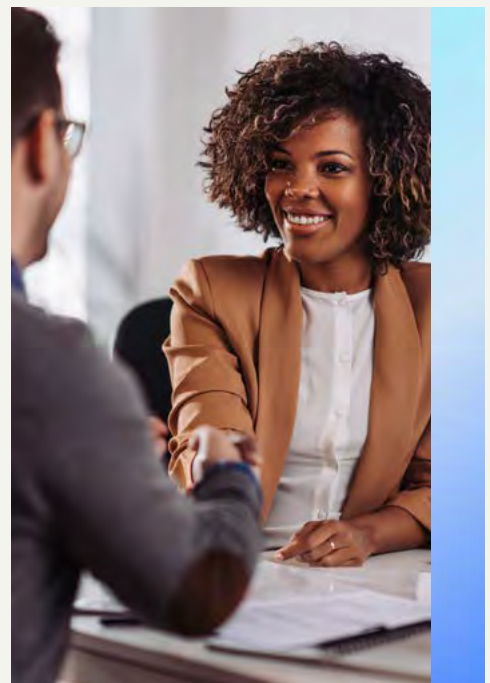
Intuit Enterprise Suite works well for clients:

- Requiring advanced customer segmentation and targeting capabilities
- Needing to measure marketing ROI more accurately
- Wanting to integrate marketing efforts with financial data

Workforce management

As the team grows, so do human resource and payroll needs. Intuit Enterprise Suite might address your client's needs if they are:

- Struggling with payroll for a growing workforce
- Needing better time tracking and project allocation
- Requiring more robust human resource and benefits management





Scalability and future-proofing

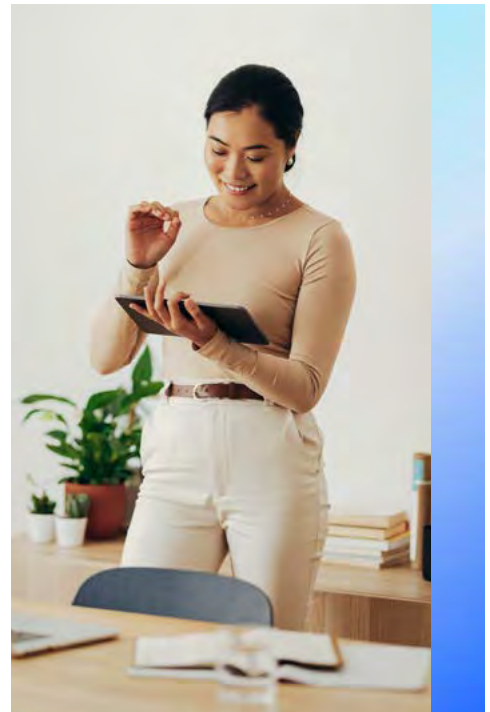
Look for signs that current systems are straining under growth. Consider Intuit Enterprise Suite if your client:

- Manages systems that are unable to handle increasing transaction volume
- Looks for a solution that can grow with the business
- Wants to avoid disruptive migrations in the near future

Decision-making challenges

Enterprise solutions can provide the insights needed for informed decision-making. Consider Intuit Enterprise Suite if your client:

- Has difficulty making data-driven decisions due to lack of real-time insights
- Needs better tools for scenario planning and forecasting
- Wants to leverage AI for business intelligence and predictions





Is your client ready for enterprise tech?

Assess your client's needs and future plans to identify when they're ready for more advanced, enterprise-level solutions like the **Intuit Enterprise Suite**.

This transition can help them overcome growing pains, streamline operations, and position their business for continued success and scalability.

[Learn more](#)