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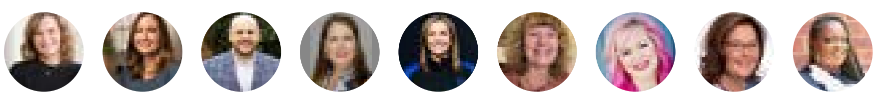
Ensuring success in your client migrations

Best practices,
from accountants to accountants

Accountants' tips for making the switch

Nine accountants and ProAdvisors who've moved to QuickBooks Online had a lot to share about the process. For example, even though change can lead to great things, it's not easy for everyone. We each have needs, sensibilities, and feelings about change. As you work with a client to determine their migration plan, here's what these accountants feel is most important to keep in mind.



1 Get to know your client's team and their work

- Learn about the day-to-day tasks of every QuickBooks Desktop user and what factors affect their work
- Understand your client team's processes to make sure their migration will meet their unique needs
- Get set for success by outlining clear expectations and giving stakeholders the opportunity to see what's in it for them

2 Communicate and celebrate progress

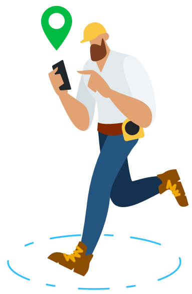
- Build confidence about migration by approaching each step from your role as your client's trusted advisor
- Encourage rapport and positivity with convenient ways to stay informed on migration progress, like a shared timeline, checklists, and status updates
- Share recordings of any meetings or trainings you hold for your client
- Consider adding celebrations to the schedule, to commemorate each milestone and engage the client team

3 Share your valuable knowledge with QuickBooks Online training

- Boost clients' familiarity by making or curating in-use demo videos
- Get help recording demos of features or workflows with digital tools like Loom and Vimeo
- Access a wealth of online resources like videos, webinars, cheatsheets, and case studies from Intuit and accountants
- Learn how to set up training for your client with accountant and QuickBooks ProAdvisor Wendy Barlin's webinar, "Getting teams accustomed to QuickBooks Online"

4 Set up your client's go-to tasks first

- Start the Online experience with workflows your client has always done in Desktop, so they start with what's familiar
- Encourage a mastery of regular tasks, like creating invoices or generating reports, before moving on to new processes
- Offer training as needed to ease them into the new interface with menu shortcuts and other tips for common workflows



5 Offer the support that fits your client

- Consider offering a period of free post-migration support through a real-time communication tool like Slack
- Extend this access for a reasonable monthly fee for clients who need additional support
- Aggregate messages for better visibility with a tool like Liscio, for clients who prefer emails and texts

6 Meet each client where they are

- Consider which clients are more open to change and which need a slower pace
- Use a gentle transition to help a client embrace a new process
- Tailor the speed that a client sunsets their old workflows

For decades, one accountant's client documented expenses by stapling multiple receipts to paper. The idea of dropping this step after migration made them nervous. To help maintain a sense of control, the accountant had them scan receipts. Once they became more confident that the data would appear, they let go of stapling and scanning.

What do you consider the sign of a successful migration?

"

A happy client.
Lynda A., Accountant and ProAdvisor

When my client says, 'You've made my life easier.'
Carla C., Accountant and ProAdvisor

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The parts of a migration plan

Planning for your client's data conversion will help ensure it goes smoothly and without delay. Even though each client's plan will be unique, they should all include these basics:

Pre-conversion:
- Detail a migration plan
- Document workflows
- Run reports
- Review and reconcile data
- Create backup files

Conversion:
- Identify data to convert
- Run a test migration
- Migrate data

Post-conversion:
- Check Online reports against Desktop reports
- Set up regular tasks
- Verify connected services
- Consider support and training

For step-by-step guidance through the process, download A tactical guide to migration for accountants.

To help inform your client about what to expect during migration, share with them Moving to QuickBooks Online (a PDF you can co-brand).

> **Once you have some systems in place, you'll get a feel for what they're looking for, identify those pain points, and then tailor whatever services based on their immediate needs.**
>
> Kathy G., Accountant and ProAdvisor

You've got this

Each of the accountants we spoke to started with one client migration. As you continue using these best practices, your migration mastery and confidence will continue to grow.

Explore more in the Migration Toolkit.

Special thanks

We're so grateful to the accountants who offered their time and insights for the creation of this guide:

Lynda Artesani – Artesani Accounting

Carla Caldwell – Caldwell Consulting

Kathy Grosskurth – Bookkeeping Clean and Simple

Dan Luthi – Ignite Spot

Sherrell Martin – Nitram Financial Solutions

Liz Scott – Accounting Lifeline

Heather Satterley – The Appy Hour

Michelle Vilms – Vilms Consulting

Karine Woodman – 24Hr Bookkeeper