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# Looking for Help with QuickBooks?

## 7 Secrets to Hiring the Right QuickBooks Consultant



Presented by **Scott Gregory**

QuickBooks Expert and Small Business Finance Specialist



## It's Time to Crunch the Numbers...



### Does QuickBooks Leave You Searching for Answers?

#### How can a program that's supposed to be "quick" feel so frustrating?

- You've tried to get help from an expert before and wound up even more bogged down with bookkeeping stress.
- You need to sort out and reorganize a QuickBooks file you inherited from a former bookkeeper or accountant.
- You just need someone to look over your shoulder to help you figure out a few functions that will make your life easier.

Help is on the way—if you hire the right person to support you. A quick rescue act just isn't fair. Who's going to stick around to make sure systems run smoothly?

Get an edge on hiring a QuickBooks consultant who understands your business needs AND can tailor a solution and stick by you to ensure results.

#### Scouting Out a Consultant?

Time is your most valuable asset. Spend it wisely by partnering with a QuickBooks consultant who understands your needs and tailors solutions to fit your business.

#### 7 Secrets to Your Success

Here are some insider tips so you can find an expert who will deliver results and save your sanity.

*"I wanted to take a minute to sincerely thank you for the work you're doing with QuickBooks—the one-on-one training, webinars, fighting our battles with Intuit, and hosting a fantastic blog that is always very helpful. I've worked with QuickBooks for about five years and I'm still learning new things. Your approach with people and groups is effective and we appreciate it. You are a valuable resource to me, and I'm sure to many others. We appreciate you and your work! Please keep up the wonderful work you do." – PAM JIMMERSON*

## **i SECRET #1: Your accountant doesn't know your QuickBooks.**

### **What? Every accountant knows QuickBooks, right?**

Well—that depends. CPAs know what they need to get out of QuickBooks, not necessarily what you need from the software to successfully run your business. Your CPA posts journal entries and runs trial balances. “What about handling estimates, sales orders and inventory,” you ask? Don't be surprised if you get a blank stare.

There are two “versions” of QuickBooks. The one your accountant knows to get the taxes done; and the one you need to run an efficient, profitable, successful business.

Look for an expert who understands the tools and modules in QuickBooks so you can get helpful information from the software. Beware of the blank stare, or “I think...” responses to your questions about QuickBooks. Hire someone who can talk about QuickBooks and your business.

## **i SECRET #2: Street Smart Beats Book Smart.**

### **We're talking about numbers.**

Ask how many QuickBooks clients the consultant has served. Choose someone with experience working with many businesses of different sizes in different industries.

A consultant who gives textbook answers might sound smart. Don't be fooled. Many businesses need more than a tweak or two to the typical software to meet their needs. A QuickBooks expert can share real-world successes and offer examples of ways a problem could be handled.

Ask for examples of the consultant's work. Request (and call!) references. Find out how well the consultant knows your industry. You can't know it all, but a strong network goes a long way.

For example, I rely on an experienced virtual team to help with complex requests from non-profits, retail or construction businesses. That way, I can focus on manufacturing, distribution and service businesses (HVAC, plumber, electrician) that are the core of my practice.

*“Your training has literally revolutionized the way we run things here. Everyone in our entire company- from Customer Service, Purchasing, Marketing, Shipping to Management has benefitted greatly from what you have taught us! I couldn't recommend your expertise more- I would tell any Quickbooks user that a session with you is mandatory. The ROI is literally 50 fold for our company.” - VICTORIA MARQUARDT*

## **i** SECRET #3: Seek Out Certification.

### **You want a street smart consultant with high-class credentials.**

But what credentials are legit? Seems like there's a certification for everything these days. Here's a cheat sheet:

- **QuickBooks ProAdvisor:** This popular designation has little substance. It means the consultant paid a fee to Intuit (the QuickBooks creator) for the title. There are no guarantees that this ProAdvisor knows anything about applying QuickBooks to your business.
- **Certified QuickBooks ProAdvisor:** So, the consultant paid a fee to Intuit and passed a test. But that test does not measure how to apply QuickBooks to your business.

The consultant may know how every button on the program functions. But forget guidance on critical business issues. Because this consultant passed the test, he or she is listed in a Certified ProAdvisor database of 20,000-plus individuals. It's another title, but no real proof that the consultant can apply QuickBooks experience to tailor solutions for your business.

- **Advanced Certified QuickBooks ProAdvisor:** This is the highest level of certification in the ProAdvisor program. Consultants with this badge are tested extensively on Quick Books knowledge. You'll find a mess of advisors with this certification if you search online, and they are highly qualified. They are also willing to dedicate time to perfecting answers to pass a standardized test. Remember, a piece of paper does not replace feet-on-the street time.

Many pros with this level of experience prefer to spend their hours working directly with clients rather than practicing for an exam. Personally, I'd rather give my smart QuickBooks answers to you than a grading system. Some examples:

- **Online QuickBooks resource.** I maintain a [QuickBooks blog](#) that has been viewed more than 1,000,000 times since it was created in 2008. It helps countless businesses succeed using QuickBooks.
- **Guides and tutorials.** I produce practical, free tutorials on a variety of functional topics offered on my [website](#) and [YouTube](#) station. Certification is a smart way to weed out consultants at first - but for a pro who can actually tailor QuickBooks to help your business run better, look for hours in the field working with clients.

*"Scott is great to work with! He listened to our needs and communicated clearly at a pace that enabled us to digest and understand what we were seeking to understand. We appreciated his follow up emails with a summary of our call as well as a to-do list for both us and himself. I would highly recommend his services if you are looking to get a better handle on Quickbooks and maximizing it's capabilities." - CHRISTINE HARVEY*

## **i** SECRET #4: Do You Speak the Same Language?

### **As if deciphering QuickBooks wasn't difficult enough...**

Now you have to learn accountant speak? Every profession has its own dialect. Skilled consultants speak your language to help you understand how to use the software.

We understand your focus is running your business. Connect with a consultant who meets you where you are—who works to understand your business and helps you navigate QuickBooks without all the technical lingo.

## **i** SECRET #5: You Get What You Pay For.

### **You've heard this before.**

If you go with the lowest cost, you'll get run-of-the-mill results. It's similar to buying an overstock item at deep discount, or ordering a customized product. If all you care about is price, you could actually end up paying more for that "cheap" solution because you have to keep buying it again and again. (It never quite works!)

You'll find QuickBooks billing rates all over the map. And you can get offshore help for as little as \$20 per hour (good luck with translation!). Other billing rates reach \$200 hour. So what is the cost of QuickBooks help? There's no real answer.

A savvy consultant can share a shortcut or unlock a new, better way to approach handling your business accounting. That means less time you have to spend on accounting and more time you can dedicate to revenue-producing activities.

## **i** SECRET #6: Make Sure the Consultant Plays Nice.

### **Your accountant and/or IT group are critical team members.**

A QuickBooks consultant should be a bridge between you and the outside accountant and/or computer support group.

You do not want a consultant who acts as the "only solution." You want to keep the great relationship you probably have with a CPA—the QuickBooks consultant should be an additional resource, not a competitor.

Ask how the consultant will coordinate with your CPA and/or IT team. If you are looking for a new accountant, keep that discussion separate when seeking out QuickBooks consulting services. (Remember, not all CPAs know QuickBooks!)

*"Once again, thanks for your expertise and guidance. You've been most helpful." – MARY BONDY*

## **i** SECRET #7: Who Talks More: You or the Consultant?

### **The consultant should listen to your situation.**

The consultant should also ask clarifying questions and work to understand your goals and objectives. Think twice if all you hear on the other line is “blah-blah-blah-certification-blah.” (This is supposed to be about you, after all!)

A good consultant will take the time to excavate beyond the surface issues you present. For example, a client tells me he wants to ditch his chart of accounts because it's not working. I dig deeper and learn that what he really wants is profit and loss by department. That realization leads to a totally different solution.

### **Make the Right Choice!**

**Remember to consider these 7 Secrets** as you search for a QuickBooks consultant. (I bet some of the tips surprised you!) While no consultant will have all the answers immediately, the right pro will ask thoughtful questions and dig deeper to learn about your business. An experienced professional will help you understand where you are today and where you could be tomorrow.

### **Much success—**

Scott Gregory  
QuickBooks® Expert

*“What makes Scott Gregory unique amongst the QuickBooks Experts we have hired, is his very practical approach to tailoring QuickBooks to our needs. His very in-depth knowledge of the “inner workings” of QuickBooks has transformed our operation in a very short time. He covers in an hour what takes others many, and has made our operation smooth and stress-free through clever short-cuts. He has made it simple to use, and has showed us how to avoid issues in the future. In just a short time with Scott, he has made something which appeared daunting and difficult to use, simple and effective.” – DAVID MARCARIAN*



## Checklist for Selecting a Consultant

**Time to compare apples to apples.** This handy checklist will help you evaluate QuickBooks consultants so you can make a smart choice for your business.

	Scott Gregory, QuickBooks Expert	Consultant B?	Consultant C?
	20,000+ hours of hands-on, field experience with QuickBooks		
	Over 1000 clients served		
	Specialties: Manufacturing, Distribution, Service Businesses		
	Publishes <a href="#">leading QuickBooks blog</a> – over 600 people per day visit for tips and tricks		
	Provides <a href="#">free QuickBooks guides</a> to educate QuickBooks users		
	Charter Member of Intuit Premier Reseller Program for QuickBooks Enterprise (since 2004)		
	Former CFO for multi-million dollar business – understands accounting, IT, inventory, purchasing and banking/finance		

*“It is wonderful to find someone as knowledgeable and personable as Scott to help with our QuickBooks problems.” – KATHI POTTS*

*"Scott Gregory continues to amaze me. Every single client out of the dozens who have purchased Enterprise Solutions from Scott and worked with him have given him a 100% Net Promoter Score. This is very unusual in our industry. It is considered World Class."* – **MARIE ARCHULETA, Channel Sales Manager for Intuit**



## About Scott Gregory

### QuickBooks Expert and Small Business Finance Specialist

Scott has been helping businesses "get it right" with their QuickBooks and business finances for over thirty-five years.

During that time, he has assisted well over 1,000 businesses, with services such as QuickBooks software installation, training and coaching sessions, and his "[Better Profits Now](#)" program.

Prior to starting his own practice, Scott served as the CFO for a \$15 million manufacturing firm for more than ten years. During his tenure as CFO, Scott was responsible for: \$4 million in inventory, \$4 million in accounts receivable, inventory control, purchasing, information technology and banking relationships.

He is a member of the Certified QuickBooks ProAdvisor program, a CPA, and certified in integrated resource management (CIRM) by APICS. Scott has taught hundreds of business owners, bookkeepers, and CPAs how to use QuickBooks effectively and efficiently through local community colleges and via webinars.

Thousands of QuickBooks users rely on [Scott's QuickBooks Blog](#) for insight, tips and tricks each and every month.



## Contact Scott Today!

For the fastest response, email Scott at:

✉ [Scott@BetterBottomLine.com](mailto:Scott@BetterBottomLine.com)

☎ 1.888.581.2839

ℹ [www.BetterBottomLine.com](http://www.BetterBottomLine.com)



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