Growing with QuickBooks
Live Bookkeeping

Ariege Mishergi, Ted Callahan, Carrie Hammond & Claire Burkard
Speakers

Ariege Misherghi
Accountant Leader, Intuit QuickBooks

Ted Callahan
Offering Leader, QuickBooks Live

Carrie Hammond
Sr. Product Marketing Mgr., QuickBooks Live

Claire Burkard
Bookkeeper Manager QuickBooks Live
Agenda

What is QuickBooks Live?
How does QuickBooks Live help me, my practice, my firm?
What is it like to be a QuickBooks Live Bookkeeper?
Q & A

Disclaimer: All features, benefits, roles in this presentation are subject to change without notice
SMALL BUSINESS WANT TO FOCUS ON THEIR BUSINESS, NOT THEIR BOOKS
Why QuickBooks Live

Our customers tell us they need assistance managing their books.

7 out 10 of all small business are not connected to an accounting professional for ongoing accounting support

6 out of 10 are already connected to an accounting professional on QuickBooks Online

1 out of 4 of new customers who abandon or cancel cite “Did not know how to get started” as top reason

Small Businesses don’t feel confident they’re doing the right thing, nor do they have the time to dedicate to do it well
While many small businesses using **QuickBooks Online** are connected to ProAdvisors through our **Find-a-ProAdvisor** platform, our research shows that:

40% of small businesses don’t work with a ProAdvisor or accounting professional

89% of small businesses say they’re more successful when working with an accounting professional

*QuickBooks Live aims to bridge that gap by providing small businesses with the bookkeeping expertise they need to thrive*
What is included with QuickBooks Live

Customize their setup
Categorize and reconcile transactions
On demand assistance
Help ensure their books are accurate at month end
Teach workflows
Personalized monthly reports
Be ready for tax time
FREEDOM TO FOCUS ON THEIR BUSINESS
CONFIDENCE THAT THEIR BOOKS ARE ACCURATE
QUICKBOOKS LIVE HELPS SMALL BUSINESSES MAKE SMART FINANCIAL DECISIONS
How does QuickBooks Live help me, my practice, my firm?
Working as a QuickBooks Live Bookkeeper

Make extra money

Work from home

Set your own schedule
Growing your practice as a QuickBooks Live Bookkeeper

Expand your network

Develop your skills and industry expertise

Learn new technology
How QuickBooks Live can help larger firms

Free up capacity for advisory services

Hire ahead of demand

Expose early career talent to training and broader industry knowledge
What is it like to be a QuickBooks Live Bookkeeper?
Qualifications

ALL of the following:
Active QuickBooks Online ProAdvisor certification
1 or more years experience working with QuickBooks Online
Proficient with technology
Strong customer service skills
Ability to work independently in a fast-paced environment

and ONE of the following:
Active CPA credential (Certified Public Accountant)
Active CPB credential (Certified Public Bookkeeper)
Bachelor's degree
3+ years managing the books for a Small Business
Identifying top talent at all levels

Qualifications

Assessment

Associate Bookkeeper

Senior Associate Bookkeeper

Expert Bookkeeper

Senior Expert Bookkeeper
Growing with QuickBooks Live

**Expert**
Serve our customers and grow your expertise

**Lead**
Support our experts and develop your leadership skills

**Manager**
Lead a team and shape our service
Getting connected

Though remote, our bookkeepers are connected into the larger expert network

Manager 1:1

Ongoing team touchpoints

Team slack rooms

Community Platform
Working on QuickBooks Live

The Role:
Part-time (20-30 hours week)
Year-round work
A fixed schedule that fits your life, with hours between 6am and 6pm PST Monday through Friday

Benefits:
401k enrollment with a match by Intuit
Employee stock purchase plan (ESPP)
Employee Assistance Program
Bonus incentives
Q&A time!
What do our Bookkeepers say?

“I've been a bookkeeper and an accountant for twenty five years but there are things that I don't know. And having the ability to reach out to anyone in our network to ask the questions I need to make certain that my small business receives the best service possible has been an amazing resource.”  - Dayna, 25 years of bookkeeping experience

“Well we have a really flexible schedule; you can work from 6:00 a.m. to 6:00 p.m. (PST). We work all across the country and you can pick your times that work best for you and you can also work with your small businesses to find a schedule that works for both of you. So it's really flexible and it works well for everyone involved.”
- Kiva, 20 years of bookkeeping experience

“Joining QuickBooks Live has definitely impacted my business in a huge way. I’ve been able to serve small business owners all over the United States. I’m not locked geographically to the small business owners in my area.”  - Jon, 3 years of bookkeeping experience
Session summary

What is QuickBooks Live?
Ongoing, monthly bookkeeping service delivered in QuickBooks Online via a team of remote US-based Certified ProAdvisors

How does QuickBooks Live help me, my practice, my firm?
• Earn extra money
• Work from home during hours you set
• Learn from a network of professionals about new industries, bookkeeping best practices, and new technologies

What is it like to be a QuickBooks Live Bookkeeper?
Part-time role where I get to practice my bookkeeping craft while enjoying the benefits and stability of working in a large public company
What’s next

1. Have specific Questions: Come talk to us after the session

2. Attend another session to learn more: Day in the Life of a QuickBooks Live Bookkeeper

3. Get QuickBooks ProAdvisor Certified Friday 8AM - 2PM

4. Ready to join? Come to the booth- Match with a recruiter for onsite screening
Rate this Session on the QuickBooks Connect Mobile App

Provide feedback to help us design content for future events

1. **Select Sessions**
2. **Select Session Title**
3. **Select Survey**
4. **Add Ratings**
Material Download

1. Find the session on the agenda
2. Select + for more information
3. Download PDF of slides and/or supplemental material

https://quickbooksconnect.com/agenda/
OWN THE FUTURE