



# How to bring clients to the cloud

Philippa Hume

A photograph of two young women with long blonde hair, one in profile and one from behind, talking at night. They are wearing dark jackets with fur-lined hoods. The background is dark with some green and blue bokeh lights.

**Take a few moments  
to **CONNECT** with  
your neighbour**

#QBConnect | WiFi: QBConnect Password not required

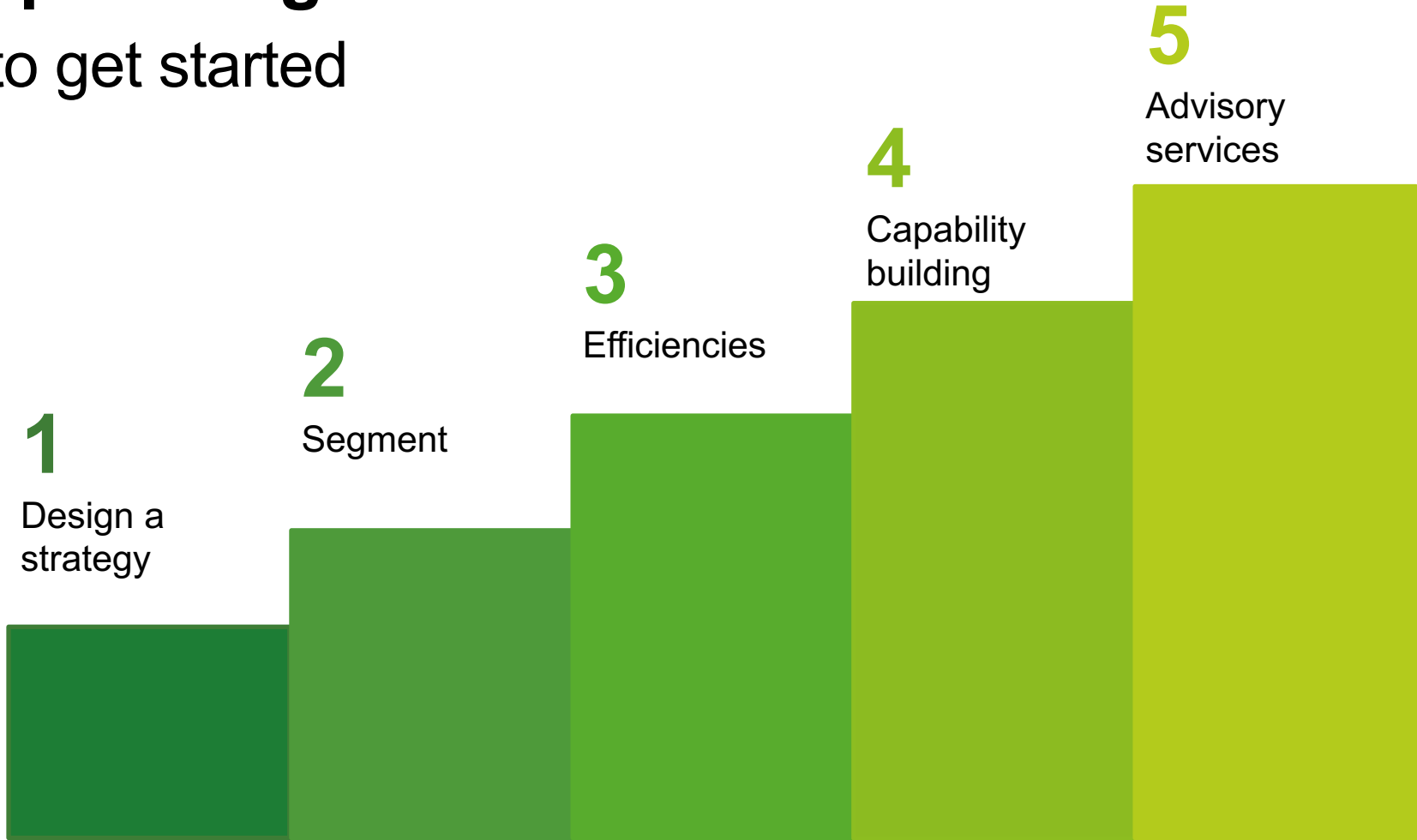
# Today's speaker



**Philippa Hume**  
Sales Leader, Intuit  
[@PhilippaHume](#)

# 5 Steps to digital

How to get started



# How do I segment my clients?

**Who are my clients?**

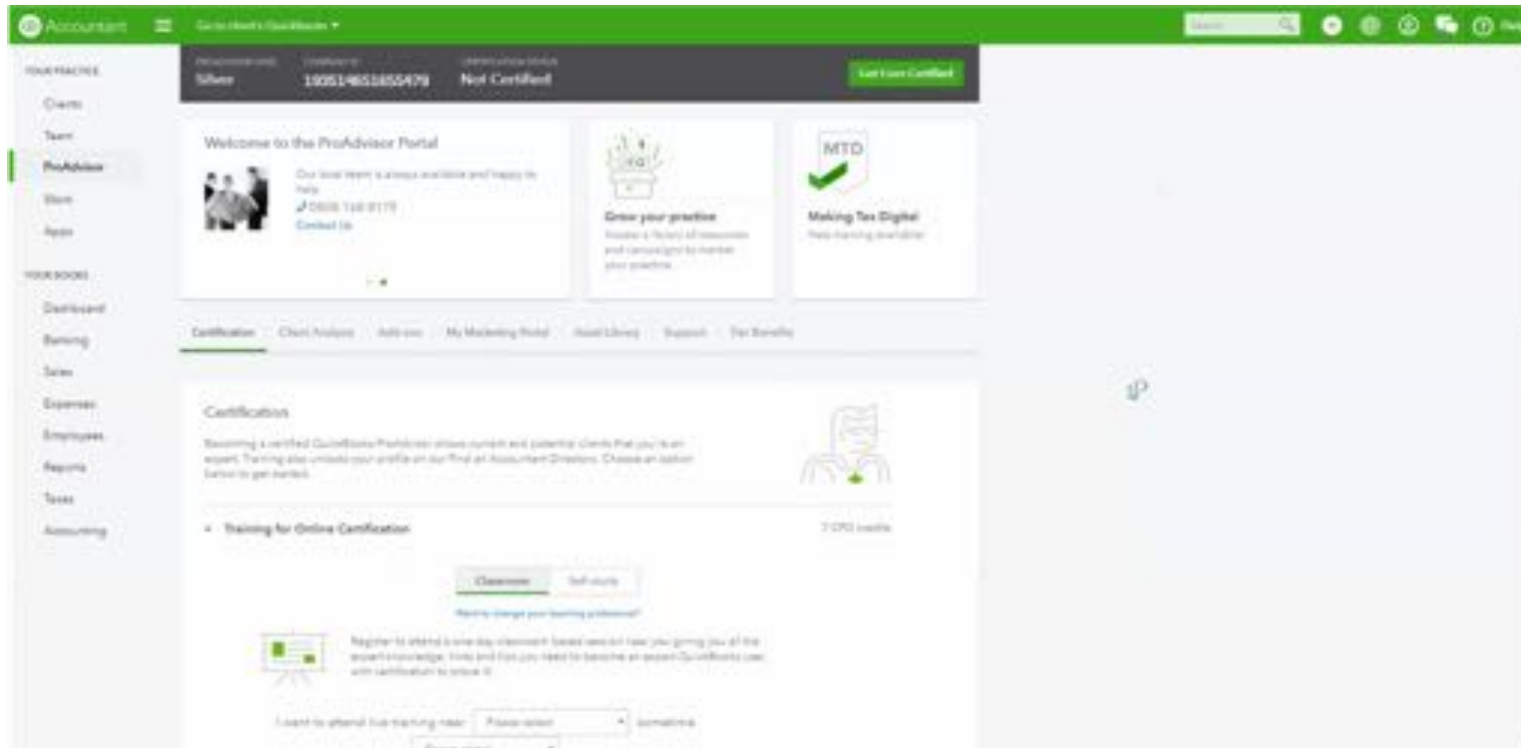
**How do I communicate with them?**

**How can I change the way I work with them?**



# Client Analysis Tool

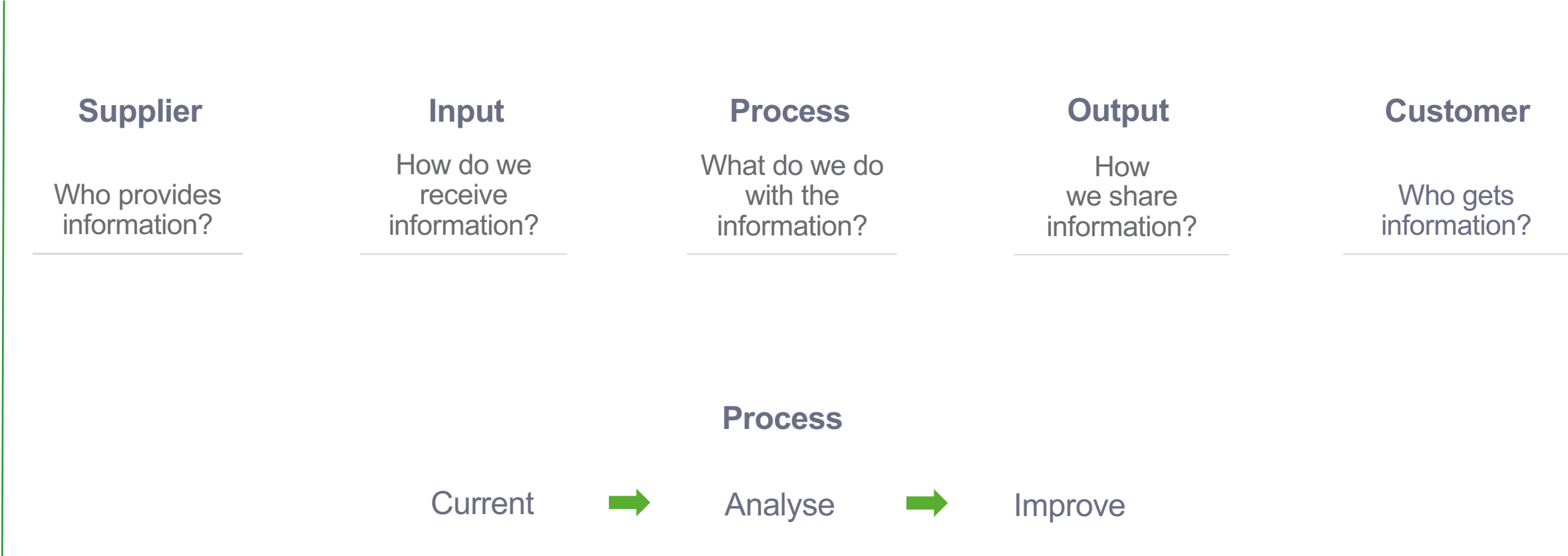
Segment your client base within QuickBooks



## How does it work?

- Upload your data
- Fill in as much detail as possible
- Identify & Prioritise
- Save time

# Step 3: Process efficiencies



# Step 4: Capability training

Core training



Advanced training



QuickBooks champion

## Certification

Becoming a certified QuickBooks ProAdvisor shows current and potential clients that you're an expert. Training also unlocks your profile on our Find an Accountant Directory. Chose an option below to get started.



### ▶ Training for Online Certification

7 CPD credits



#### QuickBooks Online Certification

**Congratulations! You are now QuickBooks Online Certified.**  
Download your certificate or your new QuickBooks Certified ProAdvisor logo.

**CERTIFIED**

[Download certificate](#)  
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### ▼ Training for Advanced Online Certification

7 CPD credits



Register to attend a one-day classroom based session near you, giving you all the expert knowledge, hints and tips you need to become an expert QuickBooks user!

I want to attend live training near  sometime



# Step 5: Services and pricing

	Weekly	Fortnightly	Monthly	Quarterly	Yearly
<b>Bundle</b>					
Service	✓				
Service		✓			
<b>Bundle</b>					
Service			✓		
Service	✓				
Service				✓	
<b>Bundle</b>					
Service	✓				
Service	✓				
Service			✓		
Service		✓			
<b>Bundle</b>					
Service					✓
Service				✓	
Service			✓		
Service	✓				

\* Pricing Model is an example only. QuickBooks does not recommend Pricing Models.



# Business strategy – What is your company vision?

## Your clients

How do they perceive your business?

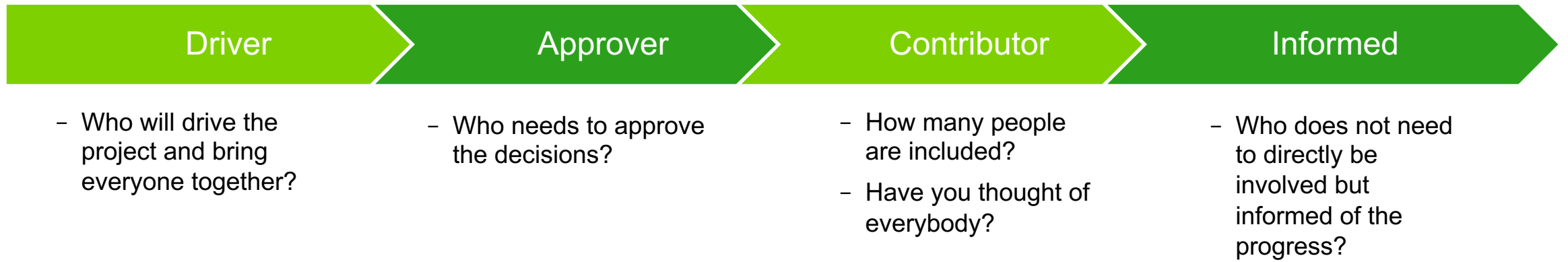
- Strategy
- Marketing
- Referrals

## Your business

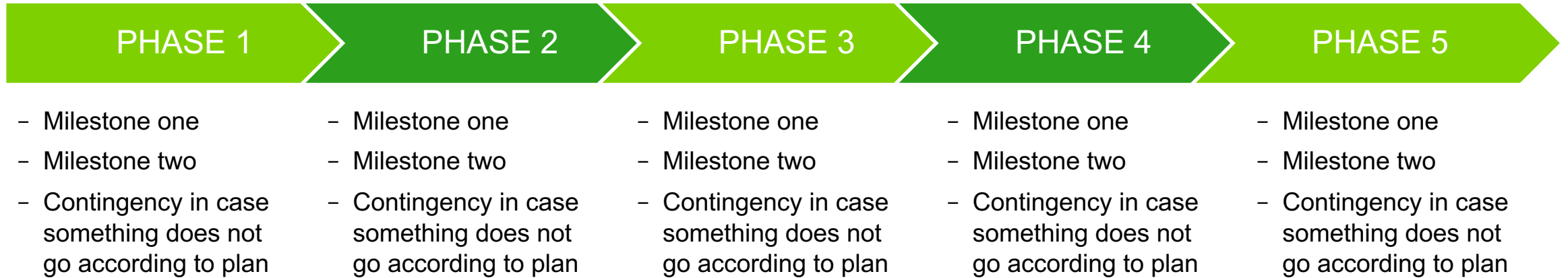
What needs to change?

- Staffing
- Training
- Processes

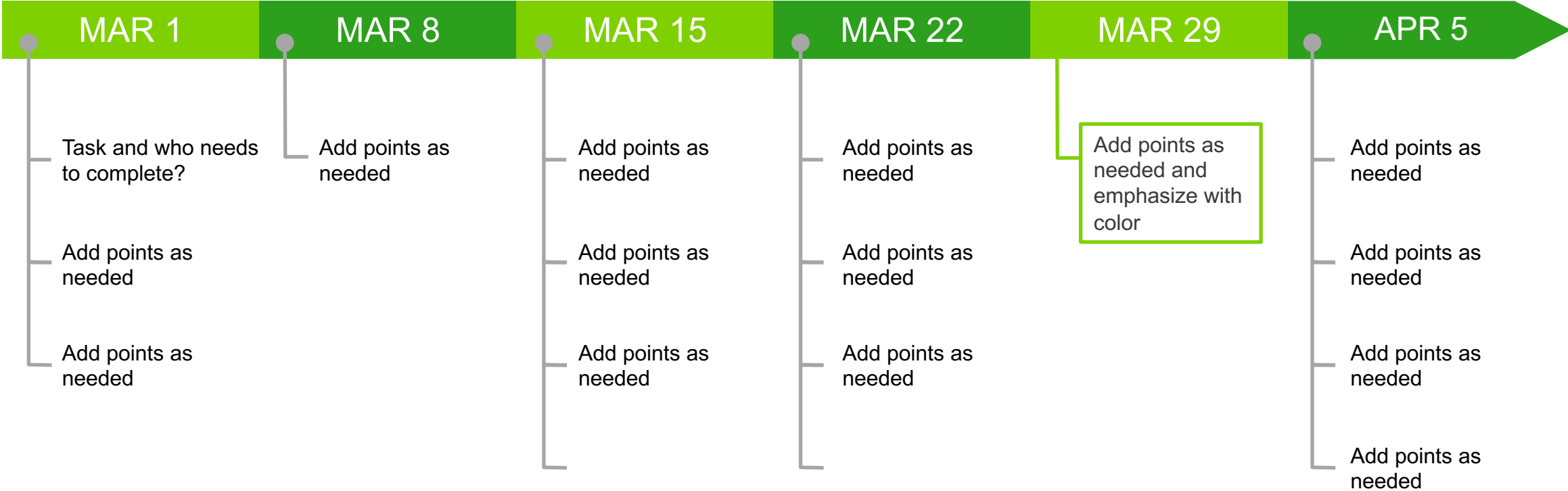
# Project model - DACI



# Lets create a project plan



# Timeline – Gantt chart



How will I make the changes  
and communicate them?

**Internally**

**Externally**



# Key Takeaways

**Know your goal, stay in control**

**A measurable strategy**

**Accountability**



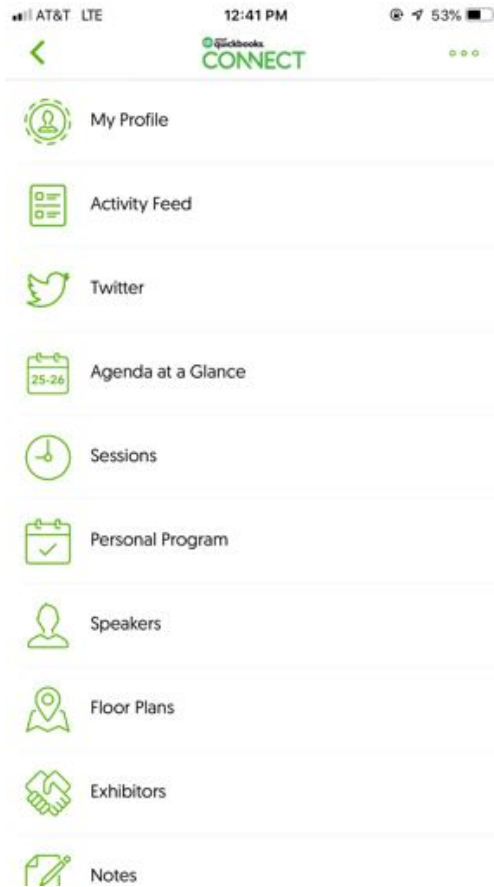
# Questions?

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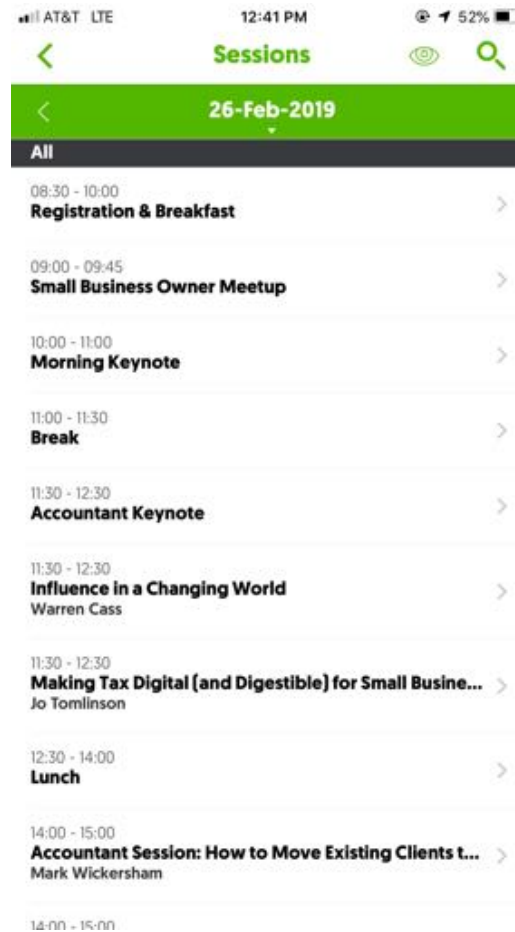


# Rate this session

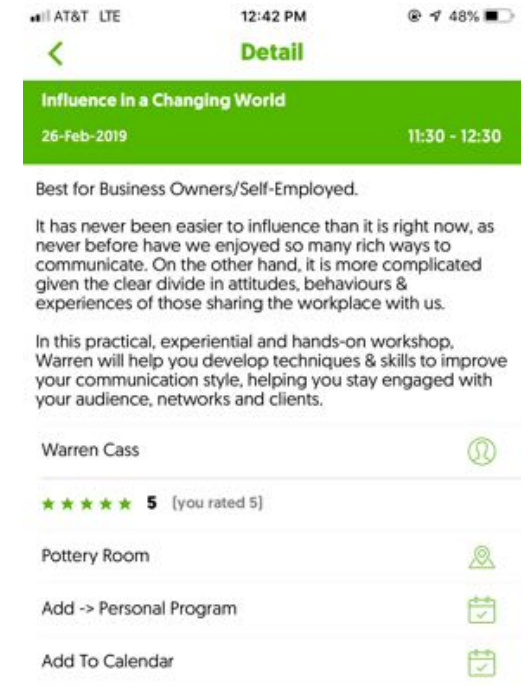
## 1. Select Sessions



## 2. Select Title



## 3. Add Rating

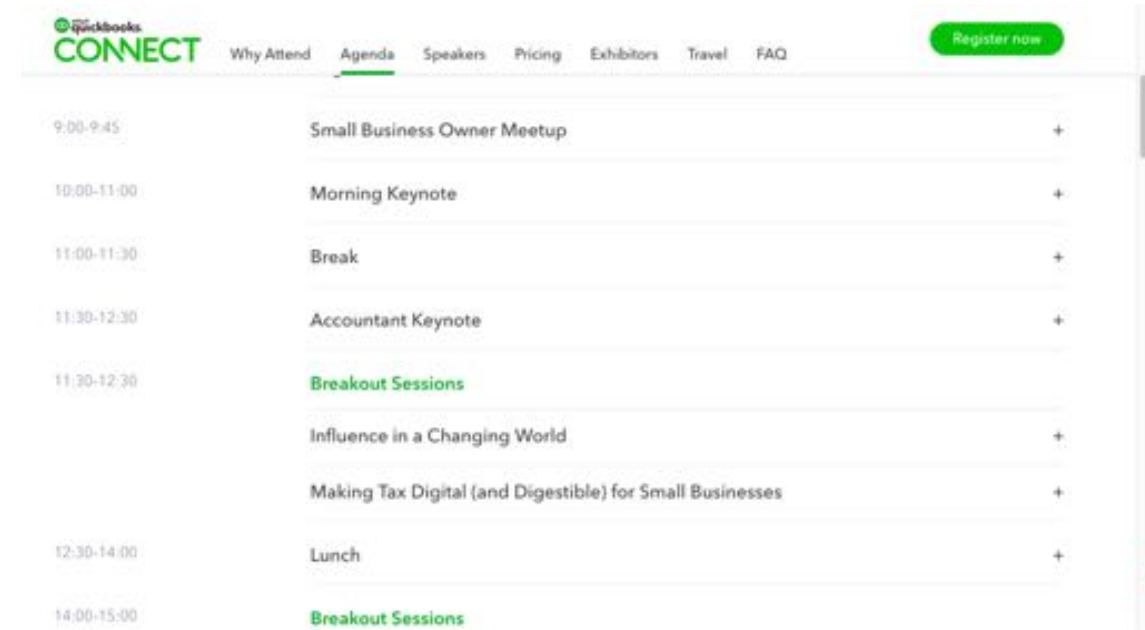


# Material Download

Session slides can be found on the QuickBooks Connect agenda page

- 1) Find the session on the agenda
- 2) Select + for more information
- 3) Download PDF of slides

<https://uk.quickbooksconnect.com/agenda/>



The screenshot shows the QuickBooks Connect agenda page. The header includes the QuickBooks Connect logo, navigation links for 'Why Attend', 'Agenda', 'Speakers', 'Pricing', 'Exhibitors', 'Travel', and 'FAQ', and a 'Register now' button. The agenda is a table with columns for time slots and session titles. Each session title has a '+' icon to its right, indicating it can be expanded to show more details or download slides.

Time Slot	Session Title	Action
9:00-9:45	Small Business Owner Meetup	+
10:00-11:00	Morning Keynote	+
11:00-11:30	Break	+
11:30-12:30	Accountant Keynote	+
11:30-12:30	Breakout Sessions	
	Influence in a Changing World	+
	Making Tax Digital (and Digestible) for Small Businesses	+
12:30-14:00	Lunch	+
14:00-15:00	Breakout Sessions	



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