We are Intuit..

- Founded in 1983
- IPO 1993
- 8,000+ Employees
- 27 Locations
- 4.6B Revenue
- 37M Customers
THE WORLD’S CHANGING
THERE ARE MORE MOBILE DEVICES IN THE WORLD THAN PEOPLE (7.2 BILLION)

GSMA Intelligence, 2015
By 2020, cloud computing will be worth over $270 billion.
CHANGE IS THE ONLY CONSTANT
The Industry Transformation

- **10%** SMBs currently use the cloud for accounting in the UK
- **61%** SMBs said that they are ready to use the cloud
- **78%** SMBs are expected to move online by 2020
- **96%** SMBs want more advice from their accountant
How SMBs **search** for accountants is changing

Today, even referrals are complemented with online search.

Client **loyalty** is rapidly declining

Commoditization of compliance.

Location **becomes less relevant**

Clients look to work with the firm that attends to their needs, regardless of where that firm may be located.

An alternative path to building **trust**

Historically, trust is built through personal contact over time. Today, trust can be built online.

Online **transparency** becomes a must

Clients expect to be able to learn all about your firm online. Excellent service is no longer enough.

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**5 Trends changing the accounting profession**

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- Location **becomes less relevant**
- An alternative path to building **trust**
- Online **transparency** becomes a must
Industry Challenges

Industry challenges

- What are the competition up to?
- How do we grow without increasing headcount?
- How do we reduce WIP and write-offs?
- How do we differentiate our offer?

Evidence

- Cloud based services have broken down boundaries
- Automation via technology
- Value pricing based on tiers and monthly subscription
- Highly targeted services based on niche markets, client groups or sectors
HOW QUICKBOOKS HELPS
Quickbooks 5 Steps to Digital
Helping firms drive change towards digitisation

**Design Digital Strategy**
- Map out growth
  - Revenue Targets of the firm
  - Cloud Project next 1, 3, 5 years
- Review value proposition & consider compliance and advisory services
- Build consistent approach to marketing, pricing and process across all offices

**Efficiencies**
- Map out E2E workflow and identify areas of inefficiencies
- Benchmark efficiency performance and identify ideal state
- Implement QuickBooks, aligning users and managing stakeholders across the firm

**Segment**
- Identify clients to move to the cloud – digital, MTD ready, outsourcing...
- Target key verticals where cloud solutions provide key value proposition
- Consider new advisory services to embed into the value proposition for cloud

**Product Champions**
- Identify change of employee roles and agree objectives
- Create on-boarding of clients team and process to scale
- Map out training plan for products and positioning to clients

**Advisory Services**
- Launch advisory services linked to revenue objectives
- Commit to minimum 1 meeting per quarter with clients to drive the opportunity
- Gather voice of the customer on new services, case studies, recommendations and feed into plans

The value of Client Segmentation
- Definitive view of Clients
- Ability to prioritise the data
- Enable informed decisions
Making Tax Digital
Start preparing your clients on digital tax today with our Free Making Tax Digital Marketing Kit

We’ve teamed up with Ian Fletcher of 2020 Innovation to create marketing guidance and templates for educating clients on digital tax and the benefits of moving to the cloud.

The free kit includes:

• Immediate actions you can take in your firm
• Comprehensive marketing advice on how to promote MTD
• Ready-to-use emails, brochure, telephone scripts and a social media plan

Get your free guide today
THANK YOU