

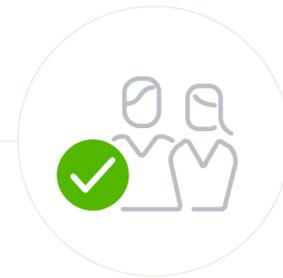
# We are Intuit..



Founded in  
**1983**



IPO **1993**



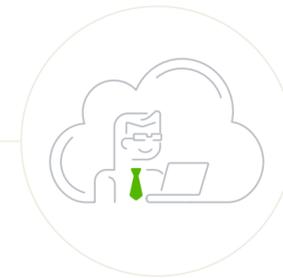
**8,000+**  
Employees



**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



# 5 Trends changing the accounting profession



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.



# 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

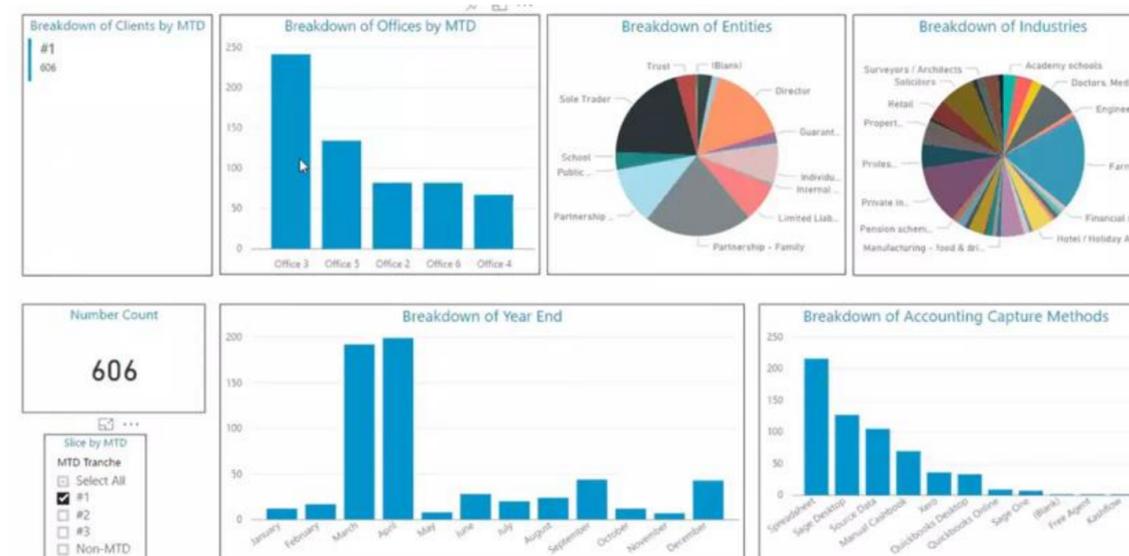
Launch advisory services linked to revenue objectives

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

