



Migrating Clients to the Cloud with QuickBooks Online

A checklist you can use or update and share with a prospect or client.

1. Migration/New File

- Make the clients whole online with what they currently have in QBO - explain the process at a high level
- Utilize Intuit migration tool https://quickbooks.intuit.com/learn-support/en-us/help-article/company-file/quickbooks-desktop-file-restoration-tool/L8DhA30cW_US_en_US
 - Run the company on their new platform with ease
 - Understand where the menu items used most often are located
- +Plus easy lifts
 - Connect bank feeds
 - Create cool custom reports
 - Provide suggestions on COA improvements with reasons
 - Take time to clean low-hanging fruit- be the resource and share what you see
 - Eliminate old accounts that are not used
 - Review the balance sheet for items not fully reconciled
 - Add a few custom reports you think would be insightful to them
- Merchant Services - set up for when they might want to use it.

2. Training

Provide training for the bookkeeper with a 30-day package, even when the bookkeeper is skilled at Desktop. You are the expert and are providing the recommended resource. This provides comfort and peace of mind. Explain the entire package.

- Reduce stress with training for bookkeepers by gaining their confidence and being their guide. We price this for a 30-day engagement fee. We have multiple meetings, unlimited emails, and texts.
- In the first meeting we make sure the staff is comfortable with the platform. After it, we take direction from the client on what needs to be learned or solved. It's a great win-win.
- If you skip this, you will most likely end up answering follow-up questions without getting paid for your expertise.

3. Next Steps

- The client will take a pause to get comfortable with the system. The length of the pause depends on their comfort level with the technology and what else is going on in the business.
- After the initial migration is complete, set up a time to discuss other options. Outline the advantages of the new platform and create a priority list of next steps. This is not included in the original engagement discussion because it can be overwhelming for clients.
- Group together as a project or do them separately, but always keep the client's perspective in mind. How much change can they handle at one time and be successful?
 - Managing Payables | Processing bills - bill payment solution
 - Managing Receivables | Processing invoices
 - Payroll Management
 - Time Tracker in QBO
 - Apps.com - What is your client trying to solve?
 - Industry Software that integrates with QBO