industry insights

By Frank Stitely

Football Teams and Clients Have More In Common Than You Think!

Billable opportunities are abound for CPAs and accountants acting as members of their clients' software implementation teams. A client's implementation team functions the same way a professional football team does. The client is like a team owner, who is well versed in his business specialty, but probably isn't an expert in football. He may be an expert in engineering or sales, but probably doesn't know much about accounting software.

A football team owner hires knowledgeable "football people" such as a general manager and a head coach to run the team. A client looks to his accountant to be the general manager, and together they select an accounting software consultant to act as coach for the software implementation team.

A football season has stages such as preseason, training camp, regular season, and postseason. The software implementation will also have stages. At each stage, the general manager/accountant and coach/consultant work closely together to assemble a winning team and complete a successful season.

In a football preseason, the owner and general manager work together to select a winning coach with a successful system. Before selecting accounting software, a business owner will work with their accountant to select a consultant, who will coach the team in implementing a successful accounting system.

Just as the general manager assists in the selection of the members of a football team, the accountant will be essential in assembling the software implementation team. The general manager matches the needs of the team to the budget available. Some client teams may be small market teams, like the Cincinnati Bengals, working with limited budgets. Some client teams, like the Washington Redskins, may have much larger budgets and be willing to spend more freely. The accountant must work with the business owner to balance the company's software needs and the budget available.

During training camp, the general manager and coach prepare their football team for the season. Likewise, the accountant and the consultant also prepare their implementation team. They collaborate on the implementation plan and make certain the team members are well trained. Together they decide on the chart of accounts, the data to be converted, and refine the team's operating procedures. In addition, they evaluate the performance and abilities of team members to determine who makes the final cut for the implementation team.

During the regular season, the general manager and the coach work with the implementation team to execute the playbook / implementation plan. They work together on game day to make the minor halftime adjustments that produce winning results. If the team needs a special report, the consultant and accountant can work together to produce a customized report. If a particular procedure doesn't work well, they make adjustments. If some team members aren't performing well, they replace them.

After the season is over, the owner, general manager, and coach evaluate the season's results. Did the team have a winning season? Did the playbook / implementation plan succeed? Is the software functioning well? Did the players /client staff perform as well as possible? Will the accounting system support the future information needs of the team? What changes need to be made for the future?

In football, successful general manager/coach relationships last for years and may span several different teams. Accountants and software consultants can also develop winning relationships that last for years, produce winning seasons for their clients, and produce billable opportunities for them both.

"Accountants and software consultants can…develop winning relationships that last for years, produce winning seasons for their clients, and produce billable opportunities for them both."

"Billable opportunities abound for CPA's and accountants acting as members of their clients' software implementation teams"

Practice Management

Staying In Front of Your Clients

E-mailing Tips Is Easier Than You Think!

Have you thought about capturing a few of the technology tips you gain through your own use of software and systems and preparing a monthly e-mail to send to your clients?

You can send e-mails quite easily through Outlook by building a distribution group, or you might consider a bulk e-mail program to aid you in sending out e-mails. Mail Them Pro from Mailthem.com is just one example of an inexpensive program that can manage bulk e-mail.
At our office, we send information to targeted clients on a regular basis. To get started, we prepared a sample of the information we planned to include in our e-mails and mailed it (the old fashioned way) to our clients, requesting that they "opt in" to receive our e-mail communications. In that mailing, we explained our privacy policy, indicating that their e-mail address is confidential and would only be used for this

e-mail. We have received positive responses and are building a nice e-mail list from this campaign. When we send our e-mails, we always encourage our clients to forward the e-mail to others, as appropriate, and we share that we are a growing firm and would appreciate referrals.
Worried about your ability to generate content? Look at your own firm and identify your guru – that one person in your office who is the primary "go to" person for software or systems questions. He or she may even be in your own accounting or bookkeeping department. Turn them into a marketing resource for your firm.

A quick tip sent out once a month keeps you in your clients' minds. Best of all, e-mail is a quick, easy and inexpensive way to keep in touch with your clients on a regular basis.

Event Calender

Feb. 14 . . . .Technology Update (page 4), David Cieslak, CPA of Information
March 12 . . .Technology Update (page 4), David Cieslak, CPA of Information
March 18 . . .Technology Update (page 4), David Cieslak, CPA of Information
April 3 . . . . .Technology Update (page 4), David Cieslak, CPA of Information
April 5 . . . . .Technology Update (page 4), David Cieslak, CPA of Information
Feb. 14 . . . . .Technology Update (page 4), David Cieslak, CPA of Information
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BSAN

Winter 2002, Volume 1/Issue 1

Best Network News

Welcome to the Best Software Accountants Network (BSAN) and our inaugural issue of Network News!

This newsletter is only one of the many benefits of your BSAN membership. In this issue, we focus on your role in guiding your clients in selecting and using their accounting and business management software. Our Chairman and CEO, Ron Verni, shares his perspective on the value you bring to your clients' systems decisions and Taylor Macdonald, our Senior Vice President Business Partner, US Operations, identifies the warning signs that your client may have outgrown their current system.

To provide some practitioner insights, Frank Stitely of Stitely, Kerstetter and Greenfeld, LLP shares his experience in working with accountants to provide system selection and implementation services to their clients on page 3. In our Technology Update (page 4), David Cieslak, CPA of Information Technology Group, Inc. provides insight into the sometimes complex process of data conversion – important information for those considering a systems change in the future. And, Susan Bradley, CPA of Tamiyasu, Smith, Horn and Braun writes of the difference that software education has made in her firm's ability to serve their clients in our Spotlight on page 5.

Each quarter, Network News will highlight new BSAN membership benefits and activities and events that may be of interest to you. In this issue, we're pleased to announce new ExecuTrain software training benefits available to you (page 6) and to share our first calendar of events with you (page 7).

Through the BSAN, we're committed to deliver innovative communications, services and offerings all designed exclusively for you. As a valued member of our BSAN community, we hope that you'll let us know how we're doing in our quest to help you better manage your practice and serve your clients.

Feel free to share your thoughts and ideas on how we can enhance our program at any time by contacting your BSAN Account Manager at 1-866-565-BSAN [1-866-565-2726] or e-mailing us at ideas@bestaccountantsnetwork.com. We welcome your feedback and appreciate your active participation in our program.

Enjoy your first issue of Network News and thank you for being a part of the Best Software Accountants Network. We genuinely value your business.

Best regards,

Nina L. Smith

Nina Smith
Chief Marketing Officer

Inside Best Network News

best software
insights for the life of your business

Executive Perspective

By Ron Verni

In the world of accounting, keeping up with changing standards and regulations is as challenging as it's ever been. With all that you have to do to deliver core services, keeping up with emerging and evolving technologies can be daunting.

But who can guide your clients on systems matters better than you can? At Best Software, we believe that you have to be involved in your clients' systems decisions because:

- You know their businesses better than just about anyone. With your close client relationships and the intimacy you develop by serving their accounting and financial needs, you understand the fundamentals of your clients' businesses better than any other outside resource they have. Your external view can help identify changes they need to make to their business processes and, at times, systems, to maintain their momentum and overcome their challenges.

- You have keen insight into their information needs. The ultimate "deliverable" of any accounting or business management solution is the enhanced information it provides its users. Given the services you deliver, you understand your clients' information needs and shortcomings. This insight enables you to help your clients define the information they need from their systems to better measure their performance and manage their businesses.

- Systems changes can impact your service delivery. It is critical that you are involved, or at a minimum well-informed, in any systems changes your clients make. Otherwise, you run the risk of encountering surprises that can decrease your efficiency or inhibit your progress on your next services engagement.

So, if we agree that you should take an active role in your clients' systems decisions, what's stopping you from doing so? Perhaps your confidence in your knowledge of technology or your clients' current systems is lacking. Or, perhaps you feel that helping to guide your clients' systems decisions requires you to commit time, money and people to becoming technology experts – and this isn't part of your growth strategy today.

At Best Software, we don't believe that accountants have

"At Best Software, we believe that you have to be involved in your clients' systems decisions..."

to become technology experts or engage in IT consulting to take an active role in your clients' systems decisions. Instead, the Best Software Accountants Network (BSAN) has been founded on the premise that what you do need is ready access to reference materials, education and support so that you can help guide or assist your clients when they need you.

One of the primary benefits of your BSAN membership is the access you have to our most popular software solutions – solutions that are probably in use by some or most of your clients. You can use the solutions internally, which can maximize your confidence in handling your clients' questions, or you can keep them on-hand for reference purposes.

Another BSAN benefit is the special access you now have to our broad range of educational offerings that include self-study, on-line and classroom training courses. All of these courses are designed to help you gain confidence in your knowledge of the core functionality of the solutions your clients may be using today or may benefit from in the future. With this increased confidence, you'll be better equipped to respond to client questions and better able to deliver your traditional services, too.

The most important BSAN benefit may be the relationship we'll help you to forge with a local Best Software Business Partner who can assist you and your clients in identifying and resolving systems issues and opportunities. Knowing that you have a local technology resource, willing and able to work with you to serve your clients, means you'll be able to respond to your clients' systems needs – regardless of how complex they may be.

As a BSAN member you have what you need to:

- Gain technology confidence and competence.

- Maximize the efficiency with which you deliver your core services.

- Make a genuine difference in the value your clients derive from their accounting and business management solutions.

And, all you have to do is take full advantage of your BSAN membership benefits today!

Sales & Marketing

By Taylor MacDonald

Have Your Clients Outgrown Their Software?

As the trusted advisor to small and mid-sized businesses, the accountant is often the first one to know that their client has outgrown their business management software – everything from accounting, to payroll and HR software, to customer relationship management software (CRM). A great service opportunity exists when clients voice their frustration with their existing software solutions.

Whether clients come right out and indicate that they are outgrowing their systems or not, there are signs that accountants should look for when it's time to be of help.

What are the warning signs?

The current system does not provide the needed features or functionality.

If your clients are not able to process their normal business transactions without the use of manual processes or integration into third-party solutions, it's a key indicator that they may have outgrown their current system. Frequently, this includes the re-keying of data or use of homegrown systems.

The client can't generate the required reports and they often need more sophisticated financial reports.

Clients often have outside requirements (banks, investors, customers) for more detailed and sophisticated reports that can't be produced by the existing system. This can require a manual effort to produce the required reports.

They need more system customization.

Clients may need a system that is unique to their industry or way of doing business. The solution may be a vertical solution geared towards a particular industry or it may be a horizontal solution with third-party customizations. In addition, there may be a requirement for screen customizations and additional fields required to process business transactions.

The system does not support the number of users the client requires.

Sometimes, clients have simply outgrown a system's ability to support a specific number of concurrent users. Most systems are designed for a particular number of users and, when clients grow, they may be forced into changing systems.

The client's transaction volume bogs their current system down.

Occasionally, a client's business grows to the point that the system can't handle the transaction volumes required. System performance slows and often leads to data corruption.

Your client needs advanced e-commerce capabilities.

As clients embrace the Internet, they may have a requirement to add Web-capabilities of e-commerce, employee or customer self-service, Web-based reporting, Web-based learning, etc. Many older software solutions have yet to embrace these new features and technologies, causing clients to evaluate new solutions.

The desire for integration with third-party solutions.

As the desire to more closely align business processes with their business management software, there may be a need to integrate existing or new solutions with third-party vertical or industry-specific solutions.

The need to support remote users (remote offices, traveling employees, telecommuters)

As clients grow in size, they typically develop a need for remote access to their systems. Also, many businesses need to incorporate multiple offices or telecommuters into their systems.

Clients that are growing quickly, expanding into new markets or merging companies also outgrow their systems quickly. By proactively communicating with our clients, we can gain firsthand knowledge of whether they are using the right business management solutions.

So, if your client has told you they have outgrown their software or you have noticed some of these warning signs, what is your next step? It's opportunity time! You have multiple service opportunities, including assisting your client with better defining their needs, creating system overview documents, assisting in the selection and even the implementation itself.

The next step is to communicate with your clients that your firm is available to assist them with these services. You might even start by authoring an article for your newsletter about businesses that have outgrown their software and how you helped solve their problems. In addition, you might share these warning signs so that they can evaluate if they have outgrown their system.

Helping to ensure that clients are using the right solution is an appropriate role for accountants – and one that will allow you to strengthen your relationship with your client. Watch and listen for these warning signs and be ready to be of service to your clients.

In The Spotlight

A Little Training Goes A Long Way

An accountant in my firm used to hate small business accounting software programs. They frustrated her. She would ask another accountant in the office to print out the general ledger and trial balance and then she would use the computer data.

One day, her husband started his own firm and she assisted him in setting up the books. Suddenly she found that she more fully understood the software and could better diagnose her own clients' issues because of her more thorough understanding. She now insists that her clients backup their data on CD-ROM or disks so that she can review their bookkeeping. She provides them with more detailed information on how to print out the reports they need and to capture the data properly. These additional services enable her to provide a heightened degree of support to her clients and have opened up an avenue for additional income, too.

In this instance, the learning was gained the painful way—installing and using the software by trial and error. Today, there are much easier ways to receive training on the business management and accounting software in use by your clients.

In my own firm, when we migrated years ago from Lotus to Excel, we brought in a trainer from a local computer training company to aid us in our transition from one spreadsheet program to the other. This significantly eased our transition and enabled us to more quickly leave Lotus behind.

Roman Kepczyk, CPA/CITP and chair of the AICPA IT executive committee states, "Studies show that untrained workers take three to six times longer to get to the same or lower level of productivity as trained workers and consume four to six times more support resources. The most effective firms have a training coordinator on staff and a comprehensive training curriculum." [DS: We need Susan to cite her source}

In this era of tighter budgets and bottom lines, there are ways to obtain training with minimal cost. One way is to participate in Best Software's Live e-Learning program. Best now offers two-hour, instructor-led training courses starting at $99 each — offered on the Web — for Peachtree, its small business software program. Using a computer and an Internet connection, you will enter a virtual training room on the Internet and communicate with a live instructor using audio voice-over IP. You will see the training presentation and live demonstrations on your PC. You can ask questions, answer surveys and participate in practice activities using advanced application sharing technology.

Web-based training is also available for other Best Software products. From MAS 90 to Abra, members of the BSAN program are able to have these tools at their desktops to enhance their ability to support their clients. I have taken advantage of these tools and find that they have significantly improved my skills with Best Software's programs and given me increased confidence in assisting our clients who own these solutions.

Featured Product...

ExecuTrain

Peachtree Authorized Training Now Available Nationwide and a New BSAN Value Partner Offer

ExecuTrain, the world leader in business training is now delivering classroom training for Peachtree Software products on a nationwide basis to all BSAN members. All trainers for Peachtree at the ExecuTrain Authorized Training Centers are certified by Best Software. As a BSAN member, you receive a $25 rebate off the tuition for your first class.

Master the fundamentals and learn the techniques to become proficient in Peachtree applications. The small class sizes, dozens of interactive hands-on exercises and Peachtree Certified Instructors will help you maximize the use of your Peachtree software and be better qualified to consult with clients.

Be sure to visit the training section in the BSAN member Web site for the current schedule, CPE information, registration, and more. E-mail the BSAN Account Management team to request the $25 rebate coupon at: info@bestaccountantsnetwork.com

In addition, ExecuTrain is a new BSAN Value Partner, offering BSAN members exclusive discounts on productivity and technical courses (i.e. MS Office, XML, ACT!). See the practice resources benefits and discounts section of the BSAN member Web site at http://www.bestaccountantsnetwork.com/resources/member_resources/executrain.cfm for a complete listing of courses offered, pricing and registration.