Using QBOA to Manage & Automate your Practice

About Me

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- Specialize in system and process implementation, change management, project management

Why this topic?

"Did _______ get done?!!??

OMG! How did that get missed?

How can I keep my finger on the pulse?

I know I need to manage my business too

There's got to be a better way to do this

Agenda

- What is Practice Management?
- In Product Demo of QBOA Work
- How to implement Practice Management

What is Practice Management?

Practice Management

What does it mean to you?

Poll

Practice Management

The systems & processes that bring

- Clients

Practice Management

The systems & processes that bring

- Clients
- Team

Practice Management

The systems & processes that bring

- Clients
- Team
- Deadlines

Practice Management

The systems & processes that bring

- Clients
- Team
- Deadlines
- Processes/Tasks

all under one roof!

Practice Management - 4 Components

1 **Clients**
Who are you working for?

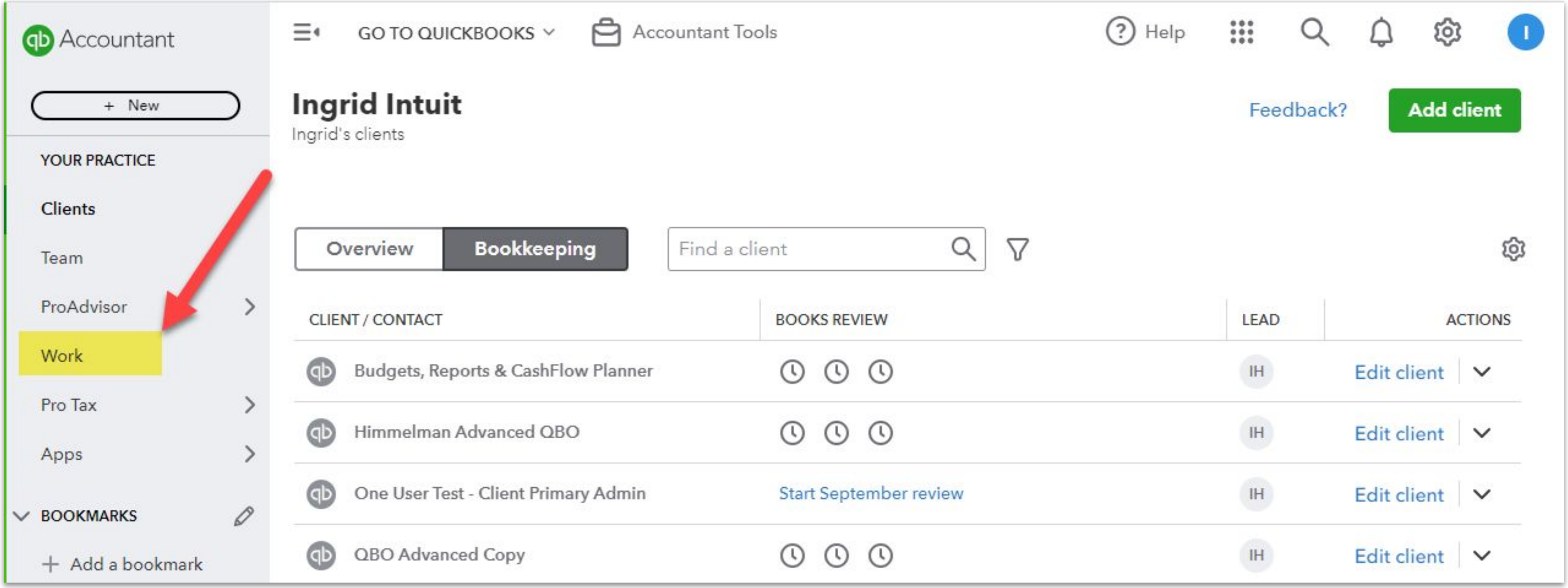
2 **Team**
The members of your staff who will get the work done

3 **Deadlines**
When does the work need to be done?

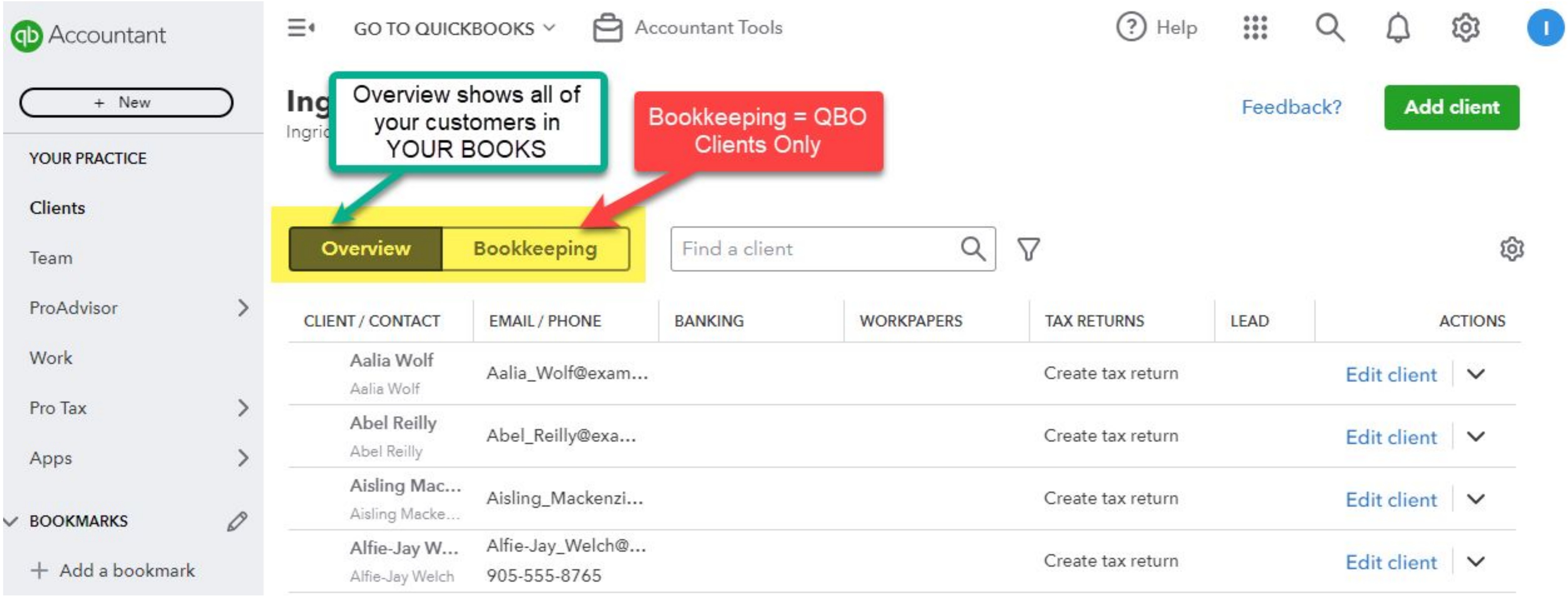
4 **Processes/Tasks**
The processes/tasks that need to be followed to get the work done correctly and on time!

Practice Management using QBOA Work

Accessing QBOA Work



Accessing QBOA Work



In-Product Demo

Work

Feedback? to Create project

- Feedback?
- Notifications - make your choices
- Manage templates -
- Create client request
- Create project - start here

Work

View choices

- Whose tasks - All, Clients or Firm
- All or specific Team members' tasks
- Types or Projects/Tasks/Requests
- From Quickbooks
- Cards, List or Calendar View

Notes

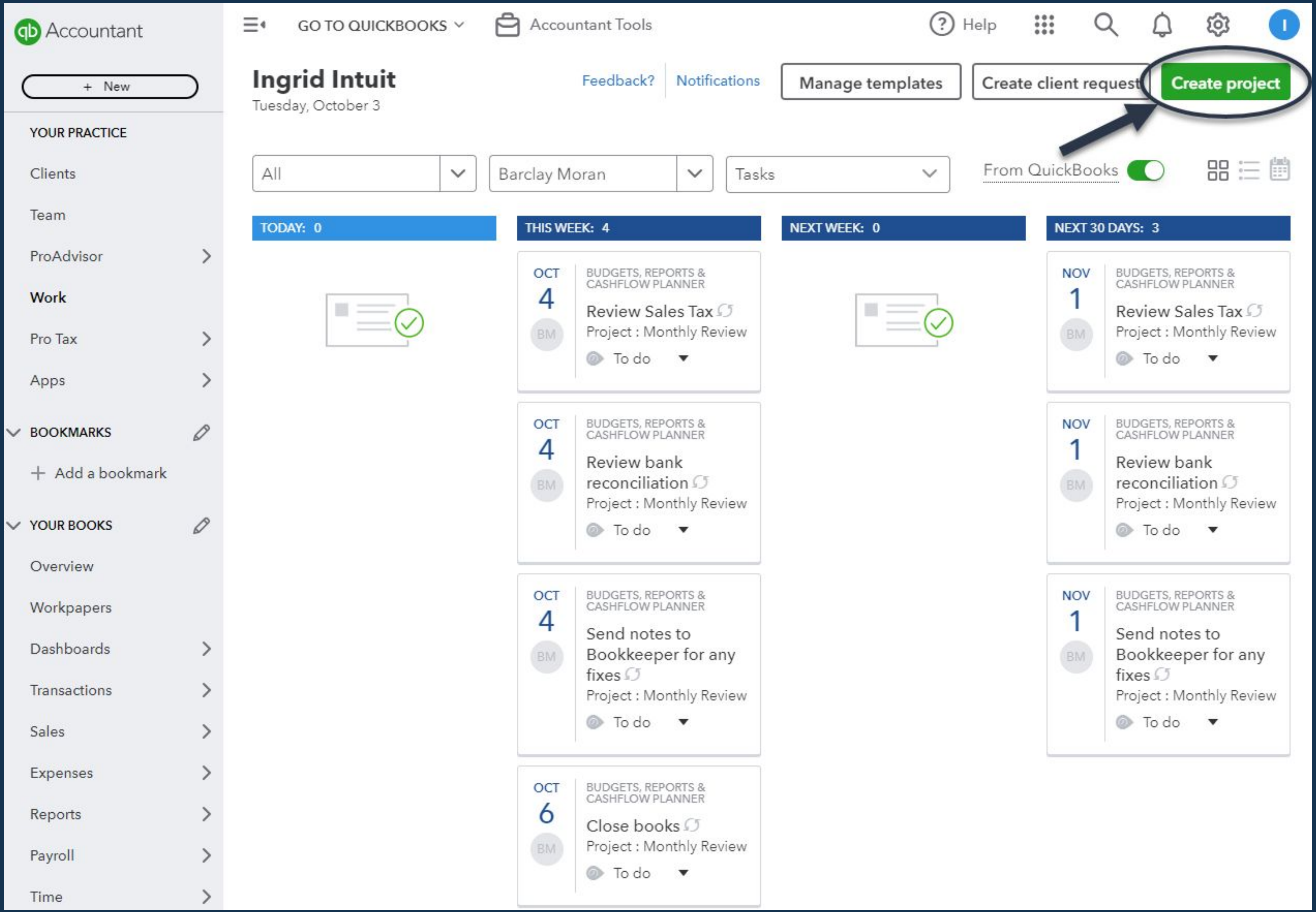
Feedback - exactly what it says. If you have thoughts/desires/frustrations - speak up!!
Notifications - you can choose what you want to have show up in your inbox. Proceed with caution or you could flood your inbox
Manage templates - have repeated projects/processes? - Templates will help you to quickly create new projects as you bring on new clients.
Create client request - only for QBO clients - but you can send request to the Primary Admin PLUS it will appear in the My accountant tab

All - shows your firm's projects, tasks and/or requests that have been created/assigned. You can choose to filter for specific groups - Clients, or just your Firm
Everyone - do you want to see Everyone's outstanding tasks or someone specific on your team - use the dropdown to filter for a specific person.
All types - you can look at EVERYTHING (projects, tasks and requests), or you can collapse the list by selecting from the dropdown
From Quickbooks - toggle on/off. Shows if there are banking transactions that need to be addressed
Different views - depending on your focus, you can change the view.

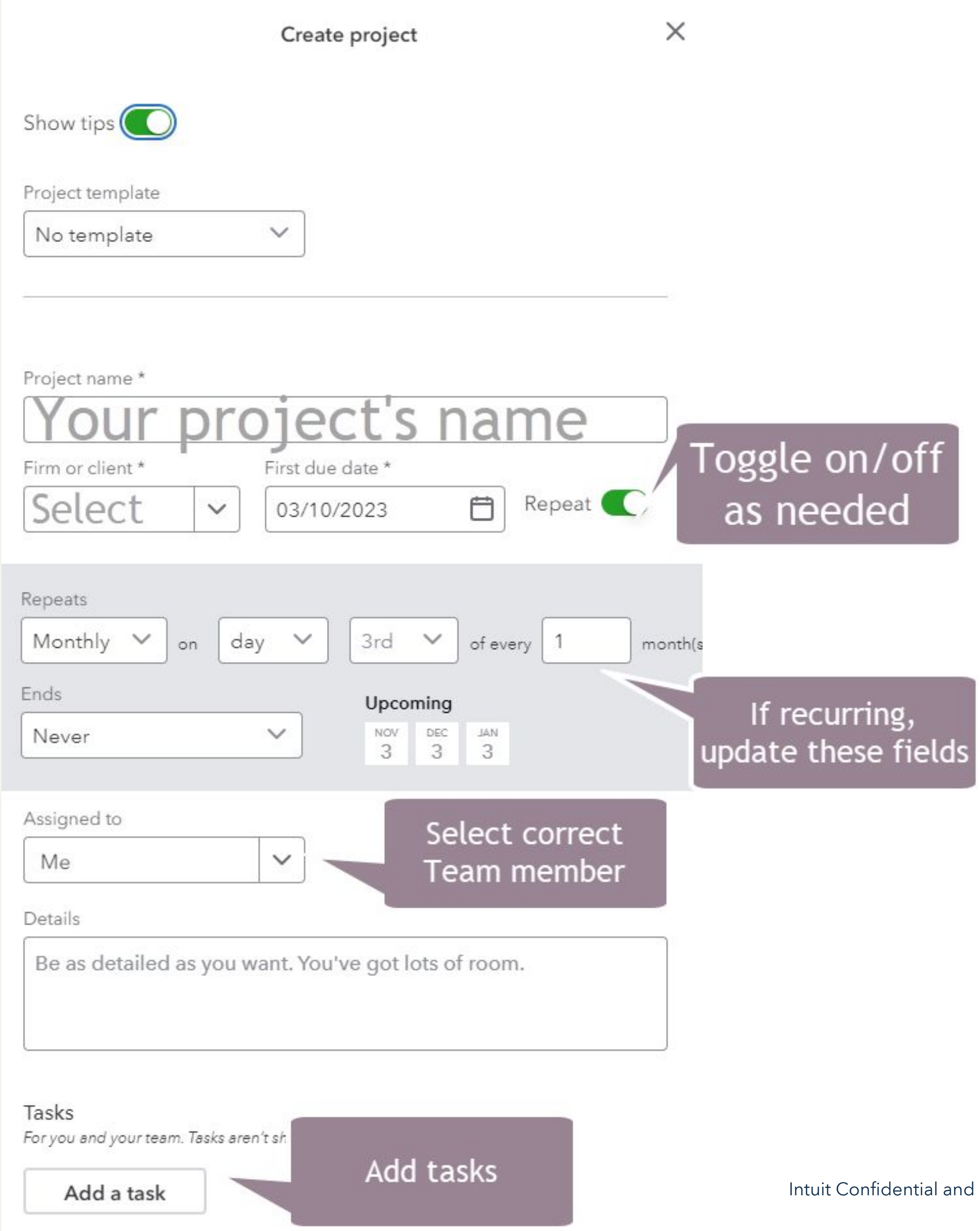
- Card - standard view
- List - you have more options for filtering in this view
- Calendar - great for getting a holistic view of your practice month by month.

Work Tab

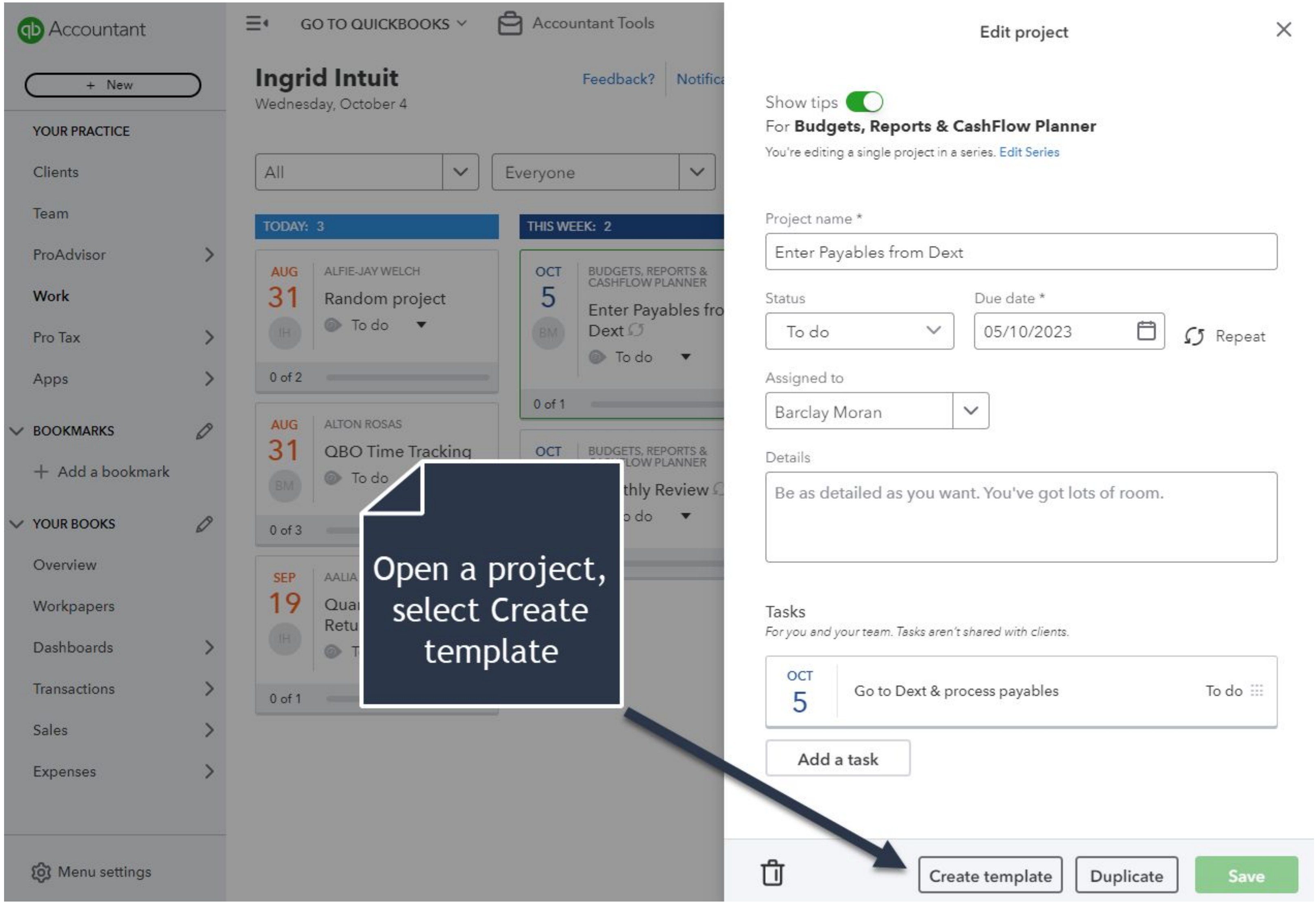
Get started



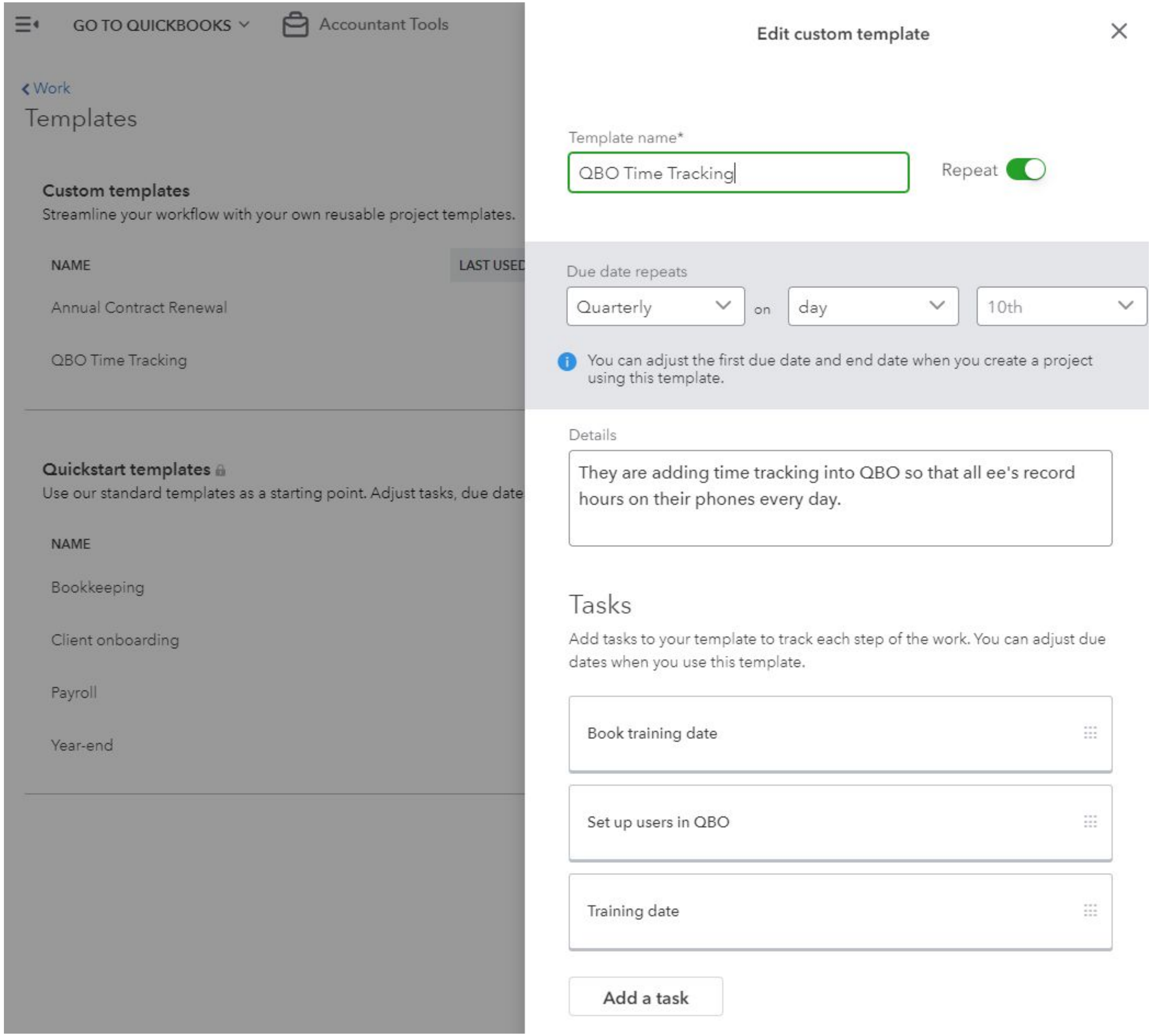
Create Project



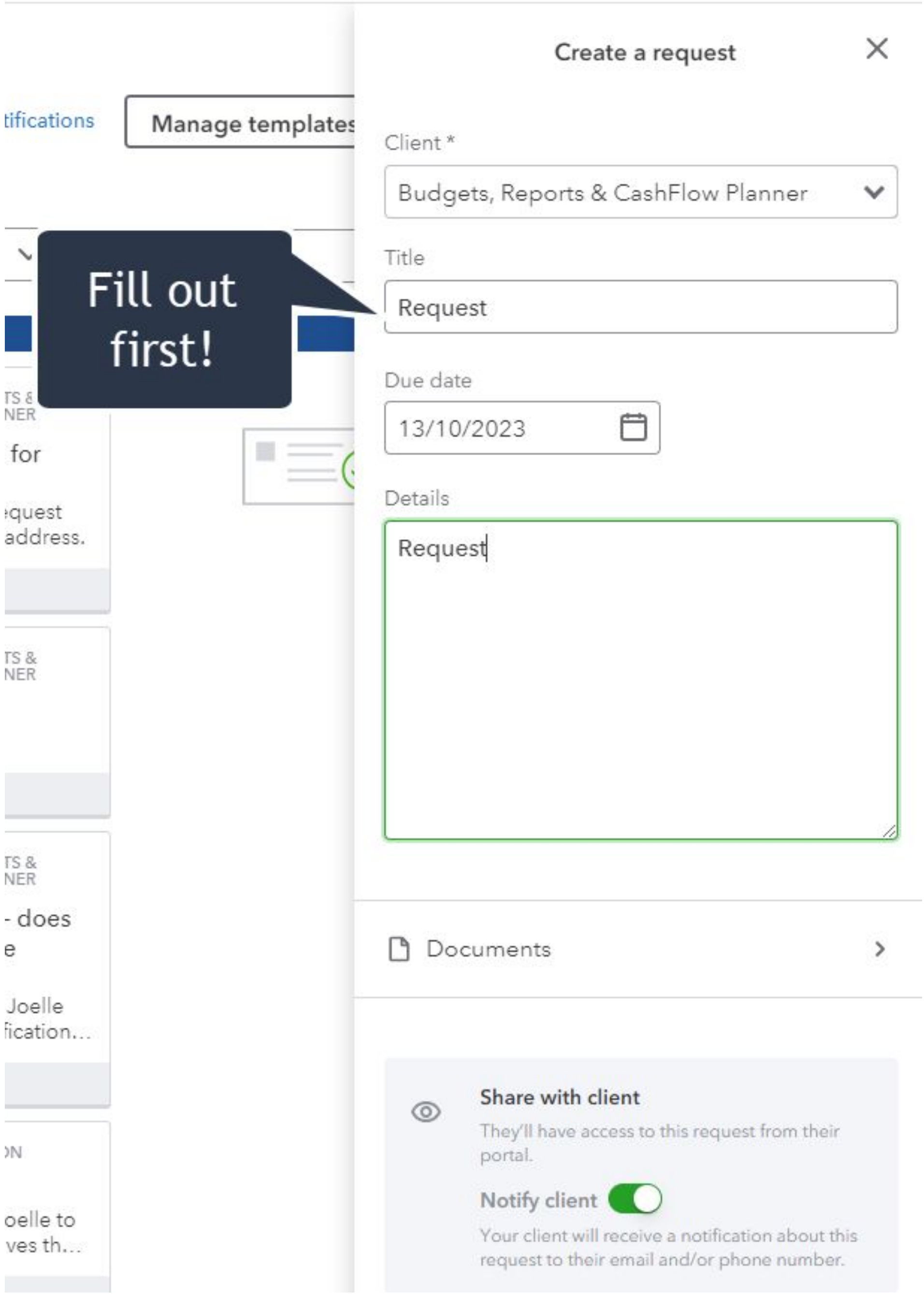
Create a template



Manage templates

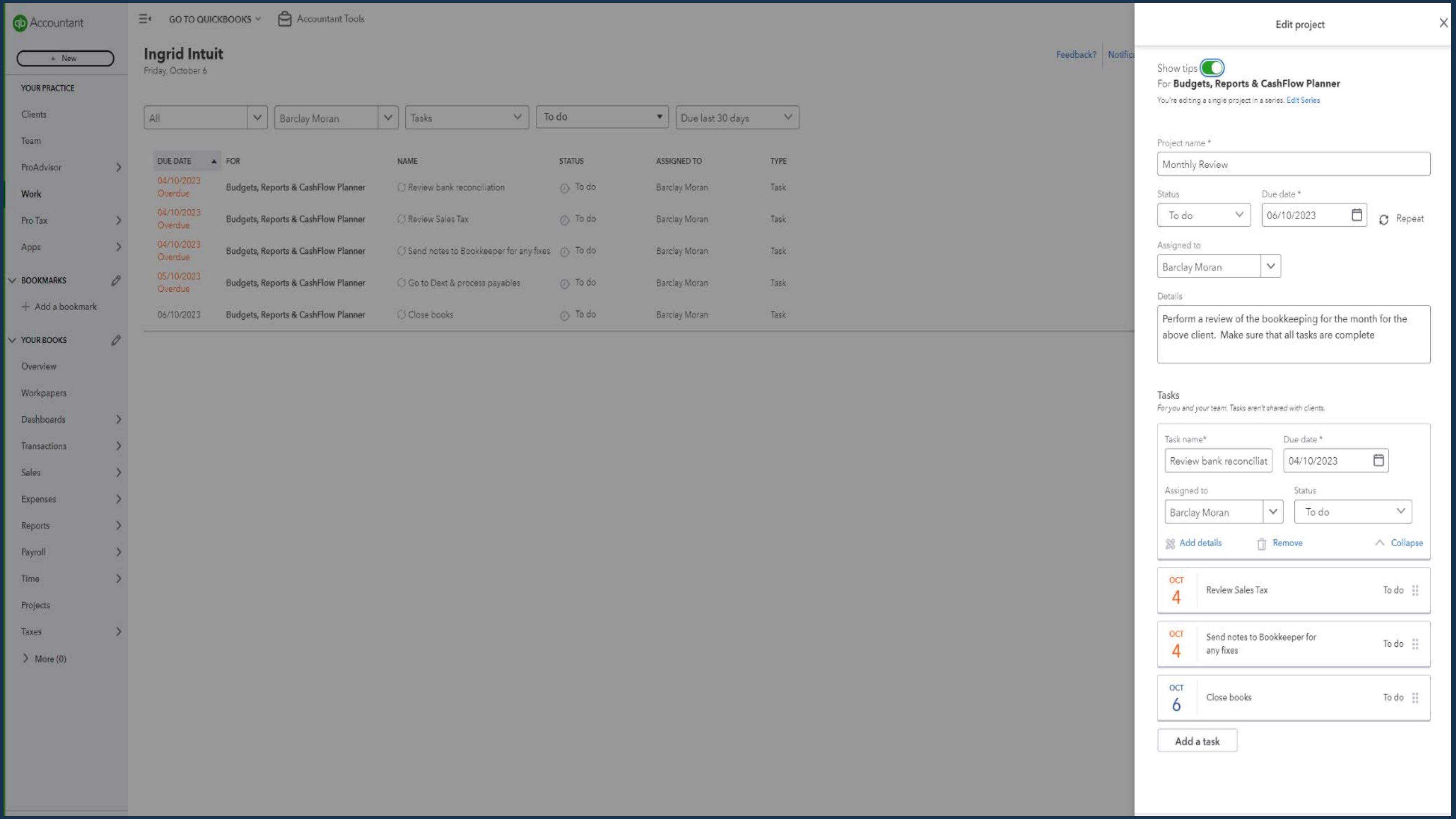


Create client request

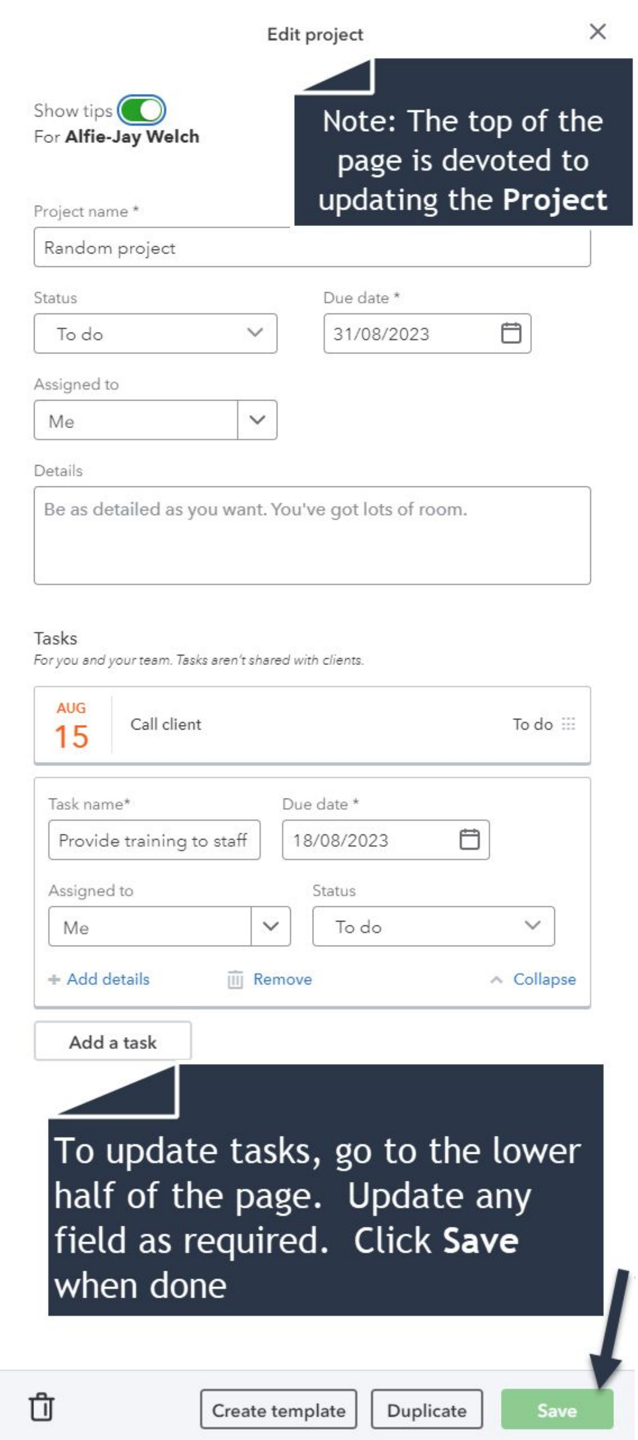


Work Tab

Working with tasks



Updating Tasks



Practice Management
Getting started

Implementing Technology

People	Communication & Training
Process	Mapping & Documenting the change
Technology	Usually the easiest part!

Why?

- Why are you doing this?
- Who will be your Champion (workplace influencer), Sponsor (leadership support) and early adopters.
- What does success look like?

Basic Implementation Plan

Pilot	Test	Celebrate	Plan next steps	Expand & Track
• Pick a simple process where you can start small • Your team can use this to practice, find success and prepare training modules & documentation	• Using your starting workflow, train others and see how it goes • Track questions & prepare responses • Ask for feedback • Ask for ideas on where to expand • Check in frequently • Document successes	• Communicate wins • Sharing the success, and building out your team of advocates will drive future success	• **Plan, communicate, train** • Look at your next process • Communicate the why, and the plan • Host training sessions • Prepare FAQ's • Talk to people about their experience	• **Repeat, repeat, repeat** • As you expand, keep communicating, listening to feedback, reassuring the resisters, emphasizing your "why", offering more training and answering questions, etc.

Key Takeaways

- Introducing practice management can reduce stress & anxiety
- The QBOA - Work feature is a great place to start with practice management
- Implementing practice management requires planning

Resources

Here are some other articles and videos for you to explore further.

- Articles
  - All Your Work, All in One Place: Work Tab in QBOA
  - Manage and track your work with client requests, projects, and tasks
- YouTube
  - QBOA Practice Management - Work Tab

Thank you

Questions?