WebCPA™
Tools and Resources for the Electronic Accountant

http://www.webcpa.com

Back

Teach Your Clients Well

(JULY 1, 2008)
BY ROBERT W. SCOTT

There are a lot of terms out there—the Intuit Club, LKA University. Art Nathan, owner of Solution Strategists, has another name, but the principal is the same in terms of making sure the implementation has a chance of success.

“We always start with education. Does the employee know not just enough to do his job, but to be really good at it and contribute to others?” he asks.

The Cranford, N.J.-based Sage Software reseller has its own system, called Target Training, that goes beyond the standard training for ensuring the staff can use a new accounting software system.

“We actually determine on a use-by-user basis what kind of training each person needs,” says Nathan. “Rather than read any book to them starting on page one and ending on page 417, we customize the training program to ensure that they are able to accomplish their given task with understanding and also understand what all of the other people around them are doing that affects them.”

How important is education and training?

One of the most succinct statements comes from Syms Clothing, a retail clothing chain operating in 11 East Coast, Midwest, Southern states and Texas. “An Educated Consumer Is Our Best Customer.”

What’s good for picking designer dress shirts, slacks, ladies accessories and blouses applies to selecting accounts receivable and payable modules. And there are several reasons why providing training provides a return to the organizations selling software, beyond fees they charge for educational sessions.

One of the big payoffs for clients is when education helps them avoid calling a reseller or accounting firm for support.

“All clients pay for training,” says Nathan. “Some of them get charged under the heading of training. Some of them get charged under the heading of support. When they pay for support, it costs five to 10 times as much.”

Nathan also believes that lack of training has a direct correlation to staff turnover, particularly among younger workers.

Thomson Reuters Builds Partner Summits

With all the conferences, shows, seminars and classes available to tax and accounting practitioners, why did Thomson Reuters Tax and Accounting business see a need for yet another get together.

Thomson has scheduled four Partner Summits for partners of firms that use its CS Professional Suite.

“We have a lot of users that really enjoy roundtabling and getting together with other users and figuring out how to use the technology,” says Teresa Mackintosh, the group’s vice president of marketing.

The summits have a structured agenda with no freedom of schedule for attendees and include two Thomson Reuters technical sales people, along

"We think a great deal of the turnover that's occurring among younger people is because they don't know their jobs well enough to know if they want to stay," he says. "I think there is an additional benefit. Employees who know their jobs better feel more successful. If they are more confident about themselves they are more likely to stay."

Surprisingly, another problem that Nathan finds with young workers is their highly touted technology skills. Those often don't equate to business skills.

"The younger people are so adept at using computers that they think they can adapt to anything," Nathan says. "And yet, when we start putting data into these basic systems, we are finding out that they don't know their function. Yes, they know what keys to hit, but they don't know why. It's raw data that's being put into the system. It's intelligence that we need to take out."

One thing that hasn't happened is having training sessions fill the time slots at Solution Strategists' office. Clients would usually prefer to work in their own offices and at their own desks. But that isn't always the best of because of office interruptions.

"We have seen it reduce the effectiveness of training by almost 100 percent," says Nathan. "We have said we will not train a particular client on their site and when it comes to key executives, we go into their offices and we close the door and put the phone on 'Do Not Disturb.'"

The Intuit Club

There's nothing exclusive or fancy about the Intuit Club. It's simply a monthly meeting for "anybody that has any relationship with QuickBooks," says Marion Nowogrodzki, who owns Pembroke Pines, Fla.-based Mendelson Consulting.

The club doesn't have any immediate connection to the Mendelson operations, which includes installation and training services for QuickBooks along with reselling QuickBooks Enterprise Solutions.

Nowogrodzki established the group, which first met in September 2006, via the Web site, Meetup.com, that enables interest group meetings to be organized and scheduled. About 90 to 100 organizations have signed up with a typical attendance of 10 to 12 persons at a monthly meeting.

"We do not necessarily do this for profit. We do not charge for this. There are no expenses other than what people want to spend on food," he continues.

with CPA M. Darren Root of Root Associates and Sandra Wiley, a consultant from Boomer Consulting.

Thomson Reuters, of course, already has training and educational efforts. For example, the company is also enrolling practitioners in its summer Best Practices Summer Series classes. But the Partner Summits have a different object in mind.

"Our goal is not that they leave the summit knowing how to use the software better," says Teresa Mackintosh, Thomson's marketing VP or the CS suite "It's about the entire workflow and automation process."

Sessions are being held in four cities with the attendance at each capped at 50 to ensure an open atmosphere, not to have the attendees become an audience listening to lectures. Depending on experience with these events, the enrollment limits could change, but the goal will remain the same.

One reason for the new approach is that Thomson feels that its software has changed. Tax preparation software, Mackintosh continues, is still relatively simple

"If you do taxes for a living, you can probably pick up a product and do a fair amount without needed consulting services, she says. But when it comes to the Engagement CS and Practice CS lines, an uneducated customer is probably not going to be a customer.

"We have crossed the line with a few of our products that you need special permission to buy them," she says.

Each two-and-a-half-hour meeting has an agenda that is very open ended, with half of the time usually open for a question-and-answer session. Nowogrodzki says the club is the perfect venue for businesses that want to absorb knowledge, but not become clients.

And while the Intuit Club doesn't produce a direct stream of customers to Mendelson Consulting, Nowogrodzki notes that it is part of an effort to keep his name before the buying public. Those efforts also include seminars, among which are continuing education sessions for CPAs produced by a local college.

A CPA, Nowogrodzki firmly agrees with the Syms slogan about the value of having educated customers. "The best clients are the educated clients who know this is a service, not a necessary evil," he notes.

Such clients are "more fun and more profitable," he continues, because they understand the greater ability to produce a return on investment when they know better how to use technology.

Despite the best efforts of vendors like Intuit and its evangelists like Nowogrodzki, many users don't know what tools are available for learning more about products they have purchased. Even though Intuit has tens of thousands of accounting professional enrolled in its ProAdvisor program, "only half the people who purchase QuickBooks know about the ProAdvisors," he notes.

LKA University

Even though Birmingham, Ala., is in the geographical area covered by the Southeast Conference, LKA University is not entity that will be entering a team in a college sports event.

Instead, LKA stands for L. Kianoff & Associates, a Sage and Microsoft reseller based in that town. The firm, in turn, takes its name from CPA Lisa Kianoff, who puts a high value on educational efforts.

These include its CPA Lunch and Learn programs, two-hour seminars which started in 2008 and which are aimed at educating the CPA community, not directly at selling software.

"We believe in supporting the community," says Kianoff.

Educated accountants are good for customers and for the profession, Kianoff continues. She fears that for the profession to have a reputation that it lacks technology skills is not good for anyone.

"I think there are a larger percentage of CPAs who are not able to stay up on technology enough to understand what their clients are about," she says. "If they are not well-versed in technology, the clients will believe they are not well-versed in tax."

For the firm's users, the company this year held Partnership 2008, which Kianoff pictures at a more traditional conference, although it was knew for the reselling organization because it marked the first time clients for Sage's MAS 90 and Microsoft's Dynamics GP line had been brought together in the same user event.

Kianoff invested heavily in the event, which drew about 130 attendees to the venue, the Barber Vintage Motorsport Museum in Birmingham. Founded by George Barber, the facility features 1,200 motorcycles in its collection.

"It was costly from an investment standpoint and costly from a time standpoint," she says.

However, there are many similarities to the kinds of training needed for both client groups as both use Microsoft's FRx software, Crystal Reports and applications such as Avalara's AvaTax, an Internet-based sales and use tax application. Since Kianoff had previously offered separate tracks for the two accounting applications, it was simpler to offer joint sessions during the two-and-a-half-day event.

On the strictly education side, the organization decided to take a different tack on providing instruction.

"We switched gears in the fall. We looked at the evaluations we got and people wanted more hands-on," she says.

The result was LKA University (after L. Kianoff & Associates), which was designed for end users, although it wasn't hands-on because the firm didn't have enough computers for all attendees.

Some of the session offered at the motorcycle museum coming from LKA curriculum. Those are designed for attendees so that, "When they walk out of those sessions, they can make better use of the investment in technology," Kianoff says.

Education can pay off in a somewhat surprising area—the collection process.

When the firm gets calls regarding late people, the staff tries to learn from the process. "We have a discussion with them. We always ask, 'What value did you get from the product,'" she adds. "Once in a will, after you start having a conversation with them, they end up willing to pay more."

Another area in which education can pay off is selling upgrades. "We require them to allow us to educate," Kianoff says. "People fight you on that. They just want to buy the software upgrade. They don't think about the fact that functionality may have changed."

And most important, from the client's point of view, is knowing more about the software can help the end user make productive changes to a business organization.

"If they are better educated, they are better able to look at a business situation and think through how the software can support handling that business situation better," she says.

Gauging the Client

Firms involved in technology can't just educate clients. They must ascertain how well the end-users can absorb the material that is being offered, according to Seth Zarny, the technology partner with Raffa, a Washington, D.C.-based CPA firm that specializes in technology.

The training offered during installation of the Dynamics SL software that Raffa sells and implements varies widely depending on the resources that clients have.

"Does one client have a very strong CFO while the rest of the staff is not quite as strong? How is the project going to be implemented?" are some of the questions that Zarny says factor into deciding the training services that can be offered.

The firm also implements the Dynamics SL project series, which means that many engagements involve putting in two systems, the project system and the financial system.

Managing client expectations is one of the most important parts of the educational process.

"You have to educate them as to what their expectations need to be," says Zarny. "When you are working with an installation of a moderate level, you educate them with requirement reviews and a design review—what is the system going to look like and how does it work. With Project, we run a pilot to make sure everybody understands how to use it. And does it match requirements?"

Smaller client companies are less sophisticated and often need more training, while larger ones have more resources. Often, the training at smaller sites involves more accounting and business education than it does technology tutelage.

"We do a lot of accounting work. We are dealing with a lot of non-technical issues, educating them on tax issues, educating them on effective practices," Zarny notes.

Intuit got serious four years ago about formalizing its education programs when it hired Alexandria Polizzi, group product manager for the accountant training network. Training, she agrees, makes customers more productive in using software.

“They are more efficient in using the product and are more efficient, they are more likely to recommend it to their friend and more likely to recommend it to small business.”

Polizzi says the certification process in the ProAdvisor program is part of Intuit’s training efforts. “One of the big reasons people sign up for the ProAdvisor program is for certification and education,” she says. “We consider that to be a good return on investment.”

Earlier this year, Intuit launched podcasts for a variety of customer segments, including accountants. The company is using hands-on training and is also exploring global learning through SecondLife, a 3-D virtual world on the Web.

Meanwhile, CCH is tackling product education with CCH University, an online curriculum for users of its ProSystem fx suite that was rolled out early last month. The reason for the new program is very simple.

“We found a large majority of customer absolutely have no formal training or do informal training on the side,” says Wendy Grice, a CCH product manager.

She notes that new users seeking training on application turn to more experienced staff members, which pulls them away from their tasks. Or the firms call technical support, which ends up providing tutelage, instead of fixing problems.

CCH has started with tax courses and plans to add about six courses a year, until the curriculum covers its portfolio of products. Firms can buy access to the entire curriculum on a per user basis. A five-license is priced at about $1,000 and per user pricing drops as the number of users increases.

Firms can also purchase courses individually, which may prove more suitable for smaller organizations. Grice says CCH is investigating whether a different subscription price might be more suitable for small firms.

Robert W. Scott is editor of Accounting Technology and can be reached at ***Robert.scott@sourcemedia.com****.*

Vendor Training Resources

BNA Software Training Services

BNA Software

(800) 424-2938

CCH University

CCH

(800) 739-9998, option 1.

IntelliTax Academy

IntelliTax (formerly Orrtax)

www.intellitax.com/Support/TrainingOptions.aspx

Partner Summits 2008

Thomson Reuters Tax and Accounting

(800) 968-8900

Sage Software University

Sage Software

www.sagesoftwareuniversity.com/contactus.htm

TaxWise University

TaxWise

www.taxwise.com/training/onlinetraining.htm#2