

“I built my practice through the Find-a-ProAdvisor directory.”



Lisa Brann
Manager, BDO
Advanced Certified QuickBooks ProAdvisor®
Cincinnati, OH

The tools for a successful practice

Lisa has been part of the ProAdvisor Program since it started in 1999. Back then, she had her own firm, and found that everything—from training and certification to the Find-a-ProAdvisor directory—helped her build her business. Later, Lisa brought her practice into a larger firm so she could work with others and share expertise. *“You can’t know everything, so it’s great to be able to reach out to a fellow ProAdvisor for advice.”*

As a Diamond ProAdvisor, Lisa gets a priority listing on Find-a-ProAdvisor. *“Right now, I get about five calls a week, so I try to stay at the top of the list.”* Client reviews are an added boost to her profile. Potential clients can read about her services from a third party’s point of view, which boosts new business. *“Some people just need a quick bit of advice, and I ask them to post a review. Even if they don’t turn into a long-term client, they help my business.”*

Becoming a Diamond-level ProAdvisor

Lisa reached Diamond-level status in two ways: she has more than 20 clients on QuickBooks® Online and she’s Advanced Certified. Working with the software every day helps her stay on top of things, but there is also an extra level of expertise that comes with certification. *“I try to do the certifications as soon as possible so I am up to date.”*

As every accountant knows, clients don’t contact you when everything’s running smoothly. Most times, Lisa has the expertise to solve things herself, but she knows she can count on Diamond-level support if she needs it. *“It’s a good feeling to be able to help clients out.”*

Looking ahead, Lisa sees some great opportunities for ProAdvisors. She recommends taking a look at the apps that integrate with QuickBooks Online. *“You can build a solution that really meets the specific needs of a client. And you can speak directly with the developer to make suggestions that will help them improve the app. They’re open to that and it’s getting better all the time.”*

“Sometimes I speak to new accountants who look at where I am with my practice and think they’ll never get this far. My answer is, ‘of course you can.’ Stay up to date. Get certified. Get your profile on Find-a-ProAdvisor. It works when you work at it.”

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