

Jim Parker's

ON TO SOMETHING.

After nearly 40 years of desktop accounting he decided to move his first client online. Now he's adding more.

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“Helping my clients succeed is deeply satisfying.”

Get to know Jim

It may take a mind for numbers to become a good accountant, but it takes a passion for working with people to become a truly great one.

Jim Parker's got both. He's been in the accounting game for quite a while, and he enjoys watching clients grow. "Helping my clients succeed is deeply satisfying. One of my first clients was a gentleman who owned a manufacturing company here in San Diego. I was working on his account when I was with a firm, and he said if I ever left and opened my own firm he would be my first client."

Thirty-eight years later, Jim still keeps their books—and thanks in part to Jim's expert advice, they've now grown to twenty times their original size.



"I like to sit with my clients and really break down their costs with them. I can usually show them where they can save a lot of time and money."

"QuickBooks Online can solve a lot of problems. My clients' data is secure."



Over the years Jim has grown his firm to serve around a hundred clients, and they cover the gamut. "We have a fair amount of contractors, a fair amount of medical practices, and then it's all over the board. From an auto mechanic specialty to a small shop, a large medical group—it's pretty broad." Jim's clients range in size quite a bit, too, from hundreds of thousands in sales to pushing a hundred million.

But, no matter who the client is, it's Jim's personal touch that keeps them coming back year after year. "I like to sit with my clients and really break down their costs with them. I can usually show them where they can save a lot of time and money."

Jim's always looking for new ways to help his clients succeed and his exploration showed him that working online was a possibility for him and his clients. It intrigued him to learn about what it could mean for his firm and his clients.

How Jim uncovered deeper value

Jim had been hearing a lot about QuickBooks Online and QuickBooks Online Accountant, and this past summer he decided to try it for himself. “We finally made the decision to give it a shot.”

To do that, he needed to learn the products. So, Jim had his staff try it out. “We put our own file on there, and that’s how we decided to start taking a look at it. We also had a couple of people in here just make up companies, and found a sample company we could play with and take a look at.” While Jim and his team did practical exercises and played around with the product, they exchanged feedback to educate each other on what was working and not working for them.

So what did they find? In Jim’s words, “It can solve a lot of problems for us personally, and for our clients.” Take data backups, for example. Some of Jim’s clients on desktop would forget to back up their file, which put them at risk. By working online, “constant backup, and not worrying about the client doing what they’re supposed to do” has really helped them.

As he explored further, QuickBooks Online Accountant had advantages for him over the desktop version as well. “The mobile accessibility is a biggie. I went ahead and put it on my cell phone right away, and I’ve used it—I’ve gotten into it a few times. Like these last few days, I had my laptop with me, but I also had my phone, so I could check a few things.”

In terms of how everything works online, Jim and his team also found that QuickBooks Online Accountant and QuickBooks Online are different than the desktop versions. It’s not a simple apples-to-apples comparison. “You’ve got to get used to it, because it is different than the desktop version. But once you play with it and figure it out, it’s like anything else. It becomes pretty easy.”



“Mobile accessibility is a biggie.”





“When you try to really price it out for what you’re getting, it’s a fair fee—a really fair fee.”


As the head of a busy accounting firm with many legacy clients, Jim needed to be sure that the transition to online also made sense financially. “When you are talking to clients their biggest consideration is always cost.”

So, Jim crunched the numbers. “With the desktop version we always recommend that clients upgrade versions at least every other year, because we don’t think it’s necessary for them to do it year to year.” He found that the automatic updates that come with the online products make a big difference. “When you really price it out for what you’re getting, it’s a fair fee—a really fair fee.”

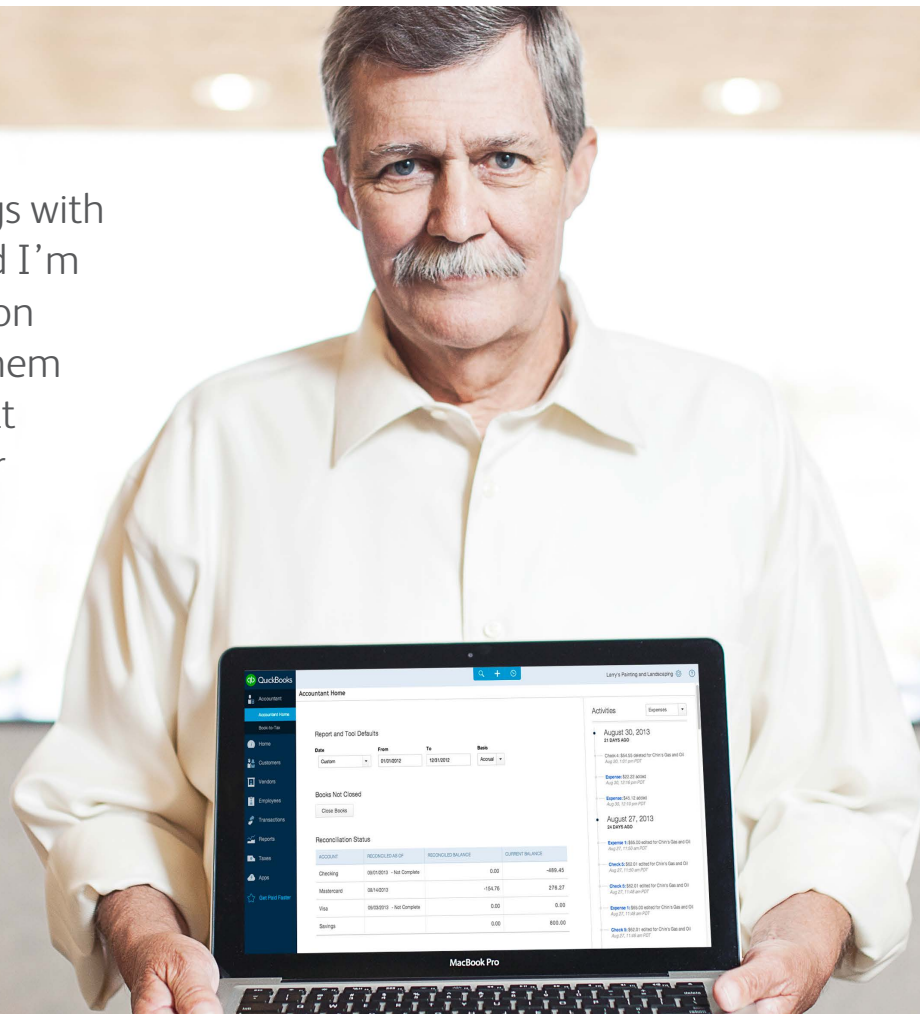
Why Jim took the plunge

Once Jim had a good idea of how QuickBooks Online Accountant and QuickBooks Online worked, he felt

comfortable recommending it to his clients. Now he’s really on to something. Having put in the time to explore the products for himself, he can clearly see the benefits for both his firm and his clients’ companies. And that makes him feel confident when he recommends the move online to a client. “We are now in the process of meeting with clients and trying to get them to switch over.” It’s a transition Jim is making client by client, taking the time to make sure the switch is right for each one before recommending the move.

It’s part of Jim’s passion—helping clients succeed by getting them the solutions they need in today’s world. And this solution, he says, is a no-brainer. 

“I’ve got two meetings with clients next week and I’m going to do a demo on my laptop to show them that I really think that it’s the right thing for them to do.”



ACCOUNT	RECONCILIATION	RECONCILED BALANCE	CURRENT BALANCE
Checking	08/08/2013 - Not Complete	0.00	-455.43
Mastercard	08/14/2013	-154.76	279.27
Visa	08/08/2013 - Not Complete	0.00	0.00
Savings		0.00	800.00

MacBook Pro