

# Christy Bertani


Almost 15 years after her first QuickBooks® Online client, this bookkeeper is as enthusiastic about working online as ever.

“

“I can work more efficiently, my clients can work more efficiently, and we can communicate better and quicker.”







Christy advises **David Pilz**,  
**Administrative Assistant and Bookkeeper**,  
**Envelope Architecture**  
Berkeley, CA

“

“If they get all turned around with a problem that they can’t unravel, that, to me, is the fun stuff.”

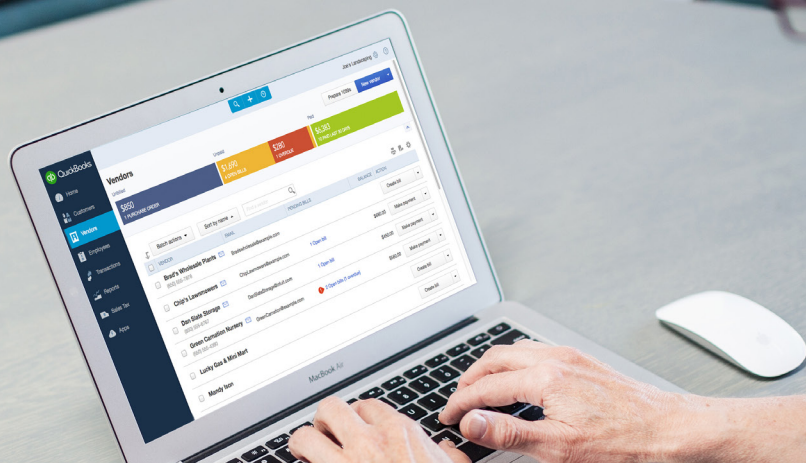
## Meet Christy

Christy Bertani is a bookkeeper. She’s not an accountant. This is the first thing she’ll explain when anyone asks about her career. Why? Because she’s proud of the work she does—and, most of all, she’s proud of being an entrepreneur.

She didn’t begin as an entrepreneur, though. In fact, Christy didn’t even begin as a bookkeeper. It happened almost by accident, when the whitewater rafting and kayaking business where she worked needed someone to manage the books. Christy volunteered—and discovered that she enjoyed it. After that, she found work for various other businesses, doing the same thing. “I would say, ‘I’ll be your office manager

and I’ll do your bookkeeping,’” Christy remembers. “That’s what I did up until ’83, when I thought it would be easy to start my own business.”

As every entrepreneur soon learns, starting and running a business is never exactly “easy”—but it *can* be fun. And for Christy, it most definitely is. Especially given the variety of clients that she attracts. Today she supports small to medium-sized businesses, from non-profits to travel agencies to medical clinics. “Some people say, ‘Well, I’m only going to work with food’ or ‘I’m only going to work with architects’—I don’t do that. I’m kind of a generalist. I’ll help anyone out,” she says. “If they get all turned around with a problem that they can’t unravel, that, to me, is the fun stuff.”





“Their first work with any accounting software was with the very first QuickBooks Online. And they loved it!”



## Focusing on her clients

Unraveling those problems is not just about number-crunching, though. For Christy, her job is very people-oriented. She enjoys one-on-one consultations, where she can really get into the minds of her clients. “Everyone sees things in a different way,” she explains. “You have to figure out ways to explain things... You think, ‘Okay, I can help this person now because I figured out how they think.’”

Sometimes, figuring out how her clients think means understanding the decisions they make—and the benefits of those decisions. Take the non-profit client who approached her in 2001. They were looking for a way to give 3,600 people access to their books, which led them to consider a move online. “Their first work with any accounting software was with the very first QuickBooks Online,” Christy remembers now, more than a decade later. “And they loved it!”

Christy wanted to know what made that non-profit client love QuickBooks Online, so that she would know when—and why—to recommend it to others. She noticed a wider conversation among her peers about the benefits of online versus desktop, but she didn’t believe that was the main issue. “At this point, they’re really more similar than different,” she says. “Accounting is accounting.”

In other words, the real question is which tool best fits her clients’ needs and makes them feel comfortable. If working online is what her clients want to do, and if she believes that it will benefit them, she’s all for it. If not, she’s happy to find an alternative, like QuickBooks Desktop. In Christy’s view, this adaptability is all about being more responsive to her clients. She uses two simple words to sum up this approach: “Clients rule!”

## Discovering the online advantage

Putting clients first requires a deep understanding of each accounting solution’s risks and benefits. For Christy, this means understanding her clients’ business, lifestyle and goals. And the more she develops this understanding, the more she sees QuickBooks Online as the best solution for a growing number of her clients. In fact, about half of her clients are online already—and that number is growing. In other words, Christy has decided that its benefits far outweigh its risks.

One of the greatest benefits of all? Flexibility, says Christy. By working online, she can access her clients’ data anytime—and with just one set of books between them, she knows that she and her



clients are always in sync. “It’s so easy for me,” she says. “I have access to their stuff... I can just pop into their data... They’re like, ‘Do you know what needs to be done? Can you just go and do it for me?’ And I can!... It’s really wonderful.”

Beyond flexibility, Christy also recommends QuickBooks Online because of its practical benefits. In one case, she keeps the books for a travel agency that tracks profits on each booked trip. To do that, they need an online solution that includes job costing. Christy did a little research and discovered that, unlike a leading competitor, QuickBooks Online had just what they needed—and today, that’s what her client still uses.

In that example, Christy’s client benefited from the features included in QuickBooks Online. But Christy herself often shares in the advantages of working online. “I really like the way it deals with cash-basis accounting,” she explains. “When someone takes money in advance, they’re making a credit of that payment to their accounts receivables. In QuickBooks Online, that still shows as income, which is 100 % accurate. QuickBooks Desktop will not do that.”

These examples get down into the details of QuickBooks Online—the features it offers, and the flexibility it provides to help clients and their accountants work efficiently. From a higher level, though, Christy has found that QuickBooks

Online does more than provide a useful checklist of tools. It helps her do her job well, so that her clients can do theirs. “Most of my clients are really very busy doing what they do to make money and don’t really have time to look at things,” she says. “I’ve been wanting to change my business more from doing the regular bookkeeping to assisting people with training or setup, or problems and troubleshooting... [working online] certainly helps with that transition.”

In other words, does moving her clients onto QuickBooks Online help her deliver a higher level of service? “Yes,” says Christy. “Definitely.”

## Recommending the right solution for her peers and clients

All of this may make it seem as though Christy is an evangelist of working online, convinced that it is right for everyone. Not so. When asked if she would recommend QuickBooks Online to any of her clients, Christy is very clear. “Depending upon what their business was,” she says, “yes.” The same is true when Christy considers making a recommendation to her fellow bookkeepers and accountants. She takes into consideration her peers’ clientele when she says, “If you’re going to have online clients... you want QuickBooks Online Accountant.”




“If you’re going to have online clients... you want QuickBooks Online Accountant.”

Christy enjoys a meeting with  
**Jim Lutz, Founder, Vaya Adventures**  
Berkeley, CA



This thoughtful approach to recommending an online solution harkens back to Christy’s openness to alternative solutions. Remember how she began her career? As an entrepreneur who cut her teeth on the fledgling accounting solutions available in the early days of computing. “I started in accounting so many years ago, and there were a ton of different accounting software systems out there. In the late ’80s and early ’90s, I was using them all.” This early experience gave her a taste for experimentation—and, above all, a respect for Intuit® and QuickBooks. After all, she’s seen them stick around when others haven’t. “All those accounting systems are gone now,” she says. “Look what you guys did!”

The secret behind the longevity of QuickBooks? Adaptability—which is not all that different from Christy’s own ability to adapt to her clients’ needs. Since helping her clients use it almost 15 years ago, she’s seen QuickBooks Online grow and expand, getting better and more refined over time, and able to accommodate a wider variety of businesses. That’s why she doesn’t mind advising a client to hold off from moving online, if she thinks QuickBooks Online and the client aren’t the right match for each other quite yet.

This perspective on the past is exactly what makes her excited about what’s ahead. For her own business, for her clients, and for the possibilities of working online. 

“

“I started in accounting so many years ago, and there were a ton of different accounting software systems out there... All those accounting systems are gone now. Look what you guys did!”