

Stacey Byrne

LEAVES HER
DESKTOP BEHIND...

...to put her clients ahead.

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“I help clients draw a roadmap
to where they want to be.”



Meet Stacey.

If you could look back through time into Stacey Byrne's seventh-grade bookkeeping classroom, you'd spot her easily. She'd be the kid in the front row with a big smile on her face. "I thought it was fun!" she recalls now. "And then I figured out you could make money doing accounting!"



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A lifelong commitment to supporting her clients.

Today, that enthusiastic student has grown into an enthusiastic accountant with over 35 clients. She works with construction companies, marine mammal researchers, driving schools—you name it. Some are big, some are small. Some are close to her California home, and others are as far away as New Jersey. But they all have at least one thing in common: they went into business because they have passion for what they do—and it's not bookkeeping. That's where Stacey comes in. "I find that some clients get their books into such a mess, and they don't know how to fix it. To me, the bigger the mess, the better. I enjoy fixing messes."

Fixing messes is the beginning. Stacey is committed to really understanding her clients: their goals, their comfort zones, even their lifestyle. She is committed to helping them find better solutions for tackling their books. "If accounting hurts," she says, "they're doing it wrong. It shouldn't be painful. It shouldn't hurt."

Why Stacey moved online.

Finding solutions to ease her clients' bookkeeping pain is a big part of Stacey's business. Occasionally, though, it works the other way around: sometimes a client will introduce Stacey to a new solution. That happened ten years ago when she gained a client who worked online—a novelty at the time. Years later, when more and more QuickBooks® Online clients arrived on her doorstep, Stacey was already a step ahead. She was familiar with QuickBooks Online Accountant. She recognized its potential. But she knew she had more to learn before she could understand the trend towards working online—and how it might help her business. So she turned to her peers.

Stacey was already a member of the Accounting Solutions Provider Network and a regular visitor to accounting conferences and networking events. Now she had a new motivation to be there: she wanted to ask about working online. What drove her fellow accountants to start using QuickBooks Online Accountant? What objections did their clients have against moving to QuickBooks Online?

How did her peers help clients overcome those objections?
What made the transition a success?

Stacey weighed everything she heard and decided that the benefits of working online outweighed the risks. “Especially being able to work anywhere, any time,” she explains. “That really was a heavy deciding factor.”

The other deciding factor? Certification. Stacy has been a QuickBooks ProAdvisor® for years, and she values the training, support and credibility that her membership provides. When she saw that the ProAdvisor Program was embracing the trend towards working online, she was ready to get on board. “I was really, really happy when they offered the certification for QuickBooks Online because I felt like that legitimized the product. Ever since that’s happened, I think that QuickBooks Online has really taken off.”



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How moving online has helped Stacey—and her clients.

After transitioning online, Stacey began to see that the benefits she’d heard her peers talk about were not only true—they were transformative for her business *and* her lifestyle. She loves the flexibility of working online, for example. “I like to be accessible,” she says, describing how

QuickBooks Online Accountant helps her support clients from anywhere. “I don’t have to say I’m out at the beach and I’ll get back to you tomorrow. I can just look up their answer. It doesn’t impact my ability to keep them moving along.”

For Stacey, being flexible is also about growing her business, no matter where her clients are. When she moves to a new city, her client list moves with her. “I’m not just stuck to my geographical location... I’m relocating to San Diego, and the fact that I have so many of my clients online makes it so much easier to do that. I don’t have to give up all of my clients and find new ones.”

With flexibility comes the peace of mind of knowing her clients’ data is secure—no matter where she takes it. “I worry more about my computer being stolen than I do about the security of my information in the cloud. I feel like, for me, it’s much safer on Intuit servers than it is in my house or in my laptop that I’m driving around with. I just like that security factor.”

Taking advantage of Intuit’s servers has another benefit for Stacey, too: affordability. “Working in the cloud is much more cost effective because I don’t need a big server.”

Flexibility, security, affordability—these are all very real benefits for Stacey. But what she likes most of all are the benefits she shares directly with her clients. Like how QuickBooks Online Accountant lets her and her clients stay on the same page, always. “I don’t have to take their data file from them and say, ‘Hey, I’m going to take this and work on it for a while and you can’t do anything.’ ... There’s no worry about who has the most recent copy—there’s one set of books that we can look at at the same time. That’s a great benefit of being on the online edition.”

Best of all, Stacey likes the confidence that working online gives her clients. “The desktop product can be overwhelming for people, and I think the online edition just makes it a little bit easier for them,” she says. Easier, how? Well, for one, she says that helping her clients use QuickBooks Online to simplify their books means they have a picture of how their business is doing—and, as a result, they can do more to achieve their goals. “I’m not just giving them the numbers, but helping them understand what they actually mean.”

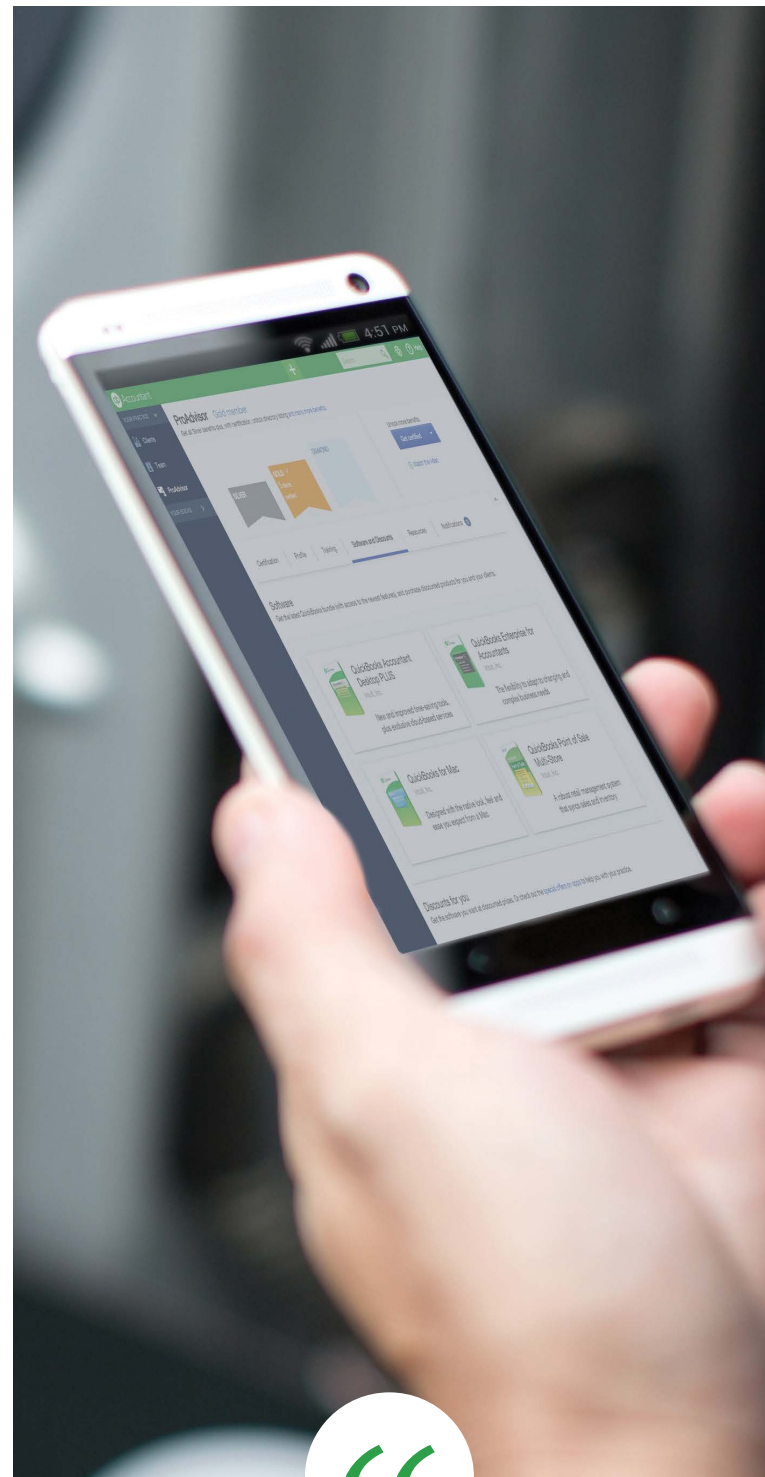
Helping clients make the transition.

To help her clients take advantage of these benefits, Stacey must get them online in the first place. Sometimes that's an easy task. For one thing, many clients choose QuickBooks Online themselves. Others haven't used QuickBooks before, so starting them fresh with the online solution works well.

In other cases, though, Stacey finds that clients who are accustomed to working on a desktop need a little more preparation before moving online. And that preparation can be complex. Often, Stacey needs to assess not just their business needs before making a recommendation—she needs to consider her clients' mindset, as well. "I don't want to push the wrong onto QuickBooks Online because I don't want them to be unhappy with the transition," she says. She has developed a strategy for discussing moving online with clients who are used to the desktop product. "I tell them, 'When it gets to the point where you don't like it, or it's stressful, or it hurts, let me know and we can fix it.'"

"Fixing it" sometimes involves more than simply moving to QuickBooks Online. It can mean finding the right apps and extensions to build a custom online solution that solves a particular client's needs. Stacey works with a driving school, for example, which uses an online booking system. She's currently researching a third-party billing solution that will sync this booking system with her client's QuickBooks Online account, eliminating a time-consuming task. This fixes a problem for her client and helps streamline the accounting process for herself—all thanks to the resources available online.

In other cases, QuickBooks Online may not be the right solution—yet. Stacey's enterprise clients require some of the tools and resources only available through desktop software. But that doesn't mean there aren't alternatives to the "old way." Introducing these larger-scale clients to a hosted solution lets them simulate some benefits of working online, like sharing the same set of books as Stacey—even if they're on the other side of the country.



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“It just makes working with clients so much easier.”

It’s not a full transition to online, but it’s what works best for those particular clients. And at the end of the day, that’s what matters to Stacey. “The most important thing is to realize that it’s not a one-size-fits-all answer, and you have to do a really good job to make sure that the client is going to be a really good fit.”

Making the right business decision.

Though Stacey knows that working online isn’t yet a magic bullet for every one of her clients, she does believe that QuickBooks Online Accountant

is the obvious choice for all of her peers—and she won’t hesitate to tell them so. “It just makes working with clients so much easier. The convenience, anytime/anywhere access, the same set of books, no transferring disks around, not having to deal with backing up and restoring data files...I highly recommend it.”

In fact, working online has been such an advantage for her business—and her lifestyle—that Stacey has recently made an important decision. “I’m not going to accept QuickBooks desktop clients,” she says. “My goal is to move more people online, because it not only benefits the clients...I can work from home, and if I hire staff, they can work from home... The data is always in sync.”

The student becomes the teacher.

That twelve-year-old girl who enjoyed her bookkeeping class so much is still part of who Stacey has become. Today, though, she’s got even more to be excited about. She hasn’t just found a way to do what she loves; through helping her clients reach their goals by moving online, she’s found a way to help other business owners do what they love, too.



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