

## **How do I get started working with a ProAdvisor? Try providing them with any of the following information:**

1. Inform the ProAdvisor of what version of the program you're using, how long you've been using it, and how many computers use the program on a daily basis.
2. Share with the ProAdvisor what specific questions you have about QuickBooks. ProAdvisor's are technical minded generally and are looking for problems to solve and this will help them to understand the nature of your issues.
3. Plan to communicate how involved you want the ProAdvisor. Services range from an accounting technician to resolve a few hang-ups or provide targeted training, to someone who will manage your accounting, make recommendations, and prepare your tax returns.
4. Tell the ProAdvisor how involved you or your staff plan to be in the consulting. If there are several errors that involve many transactions, will the ProAdvisor be the one to correct each one, or you, or your staff?
5. Inform the ProAdvisor of how you use your accounting. Is it simply necessary for tax return preparation? Do you want to measure gross margin every month and determine employee productivity?
6. Tell the ProAdvisor how you currently rate your confidence in using and understanding the program and where you want to be. You may consider yourself a 6 on a scale of 10 and you don't have an interest in getting better because you would rather manage your business than your accounting. You may consider yourself a 3 on a scale of 10 and you want to be an 8 so that you can be in control and manage your business through your accounting.
7. Help the ProAdvisor assess what your budget is for their assistance. Not in dollars specifically, but indicate whether you can't be bothered and you just want it taken care of or that you have a specific budget in mind.

## **What questions should I ask the ProAdvisor to determine if he/she is a right fit for me and my business? Try asking any of the following questions:**

1. How do you go about identifying what is wrong with my QuickBooks file, and how much might I expect to prepare for that initial investigation?
2. How are you able to demonstrate to a small business owner who is not an accounting professional, that the work you do has been executed correctly? How will I get comfort about your competence without knowing accounting and without knowing QuickBooks?
3. How do you distinguish yourself from other ProAdvisors on the site?
4. What are your rates? How do you bill for your services and what payment terms are available to your clients? Do you accept credit cards?
5. What do you require of clients to engage your services?
6. How would you assess your rate for services performed in relation to others providing similar services?