

QuickBooks Connect 2021

CPE Guide

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November 3, 2021

Be S.M.A.R.T. and intentional about growth: Turning goals into action

12:00 pm - 12:55 pm ET

Kelly Gonsalves & Kristen Nies Ciraldo

Learn how to use your unique knowledge of your business to create S.M.A.R.T. goals for your future. Join this session to reconnect with your status as a business owner, recognize the fundamentals of S.M.A.R.T. goals, and discover why goals matter for every business. Using real world examples, we will cover strategies to implement immediately.

This session is eligible for 1 credit of CPE.

Field of Study: Business Management & Organization

QuickBooks Online: The solution that grows with your business

12:00 pm - 12:55 pm ET

Matthew Fulton

Whether you are part of the growing gig economy or the owner of an established business, the QuickBooks Online suite of products offer an expandable solution to match your accounting needs. Join Matthew Fulton as he shares the benefits of each level of QuickBooks Online, how to simplify payroll through QuickBooks Time and QuickBooks Payroll, ways to track project profitability with QuickBooks Online Plus, and more.

This session is eligible for 1 credit of CPE.

Field of Study: Computer Software and Applications



Business Automation: Efficiencies of the future

12:00 pm - 12:55 pm ET

Clayton Goodhue, Nate Flake, Vanessa Vasquez

Dive deep into tech and trends in the world of automation. In this panel with QuickBooks partners, Avalara and Fishbowl, explore what their customers are craving and solutions that are making businesses more productive and efficient.

This session is eligible for 1 credit of CPE.

Field of Study: Computer Software & Applications

Make smarter decisions with QuickBooks Online cash flow tools

1:00 pm - 1:55 pm ET

Liz Scott

Understanding cash flow allows you to plan ahead and prepare for the unknown. Uncover the secrets of making beneficial business decisions while leveraging QuickBooks cash flow tools. You'll learn the principles and foundation of cash flow, how today's economy affects cash flow, and how to leverage cash flow in your business decisions.

This session is eligible for 1 credit of CPE.

Field of Study: Management Services

Reporting and insights in QuickBooks for business owners

1:00 pm - 1:55 pm ET

Hector Garcia

Small businesses need insight into their financials at all times. Join Hector Garcia, CPA to learn how to create, customize and save basic financial reports. During this session, you'll also explore how to use tags for better reporting capabilities, create management reports, and export those reports into Excel.

This session is eligible for 1 credit of CPE.

Field of Study: Computer Software and Applications



Using QuickBooks Online Payroll to support your growing business

2:00 pm - 2:55 pm ET

Brittany Malidore

As small businesses grow, their need to standardize, optimize, and structure their payroll solution to better fit their needs becomes critical. In this session, learn how QuickBooks Online Payroll gives business owners more control and flexibility, and how a dependable payroll software helps manage your employee's day-to-day needs, provides payroll compliance and reporting, and supports HR.

This session is eligible for 1 credit of CPE.

Field of Study: Computer Software and Applications

November 4, 2021

Advanced reports in QuickBooks for accounting professionals

12:00 pm - 12:55 pm ET

Hector Garcia

Join Hector Garcia, CPA for a deep dive into building a customized reports menu. By the end of the session, you'll be able to better understand custom fields and filtering tricks, and create a custom summary report.

This session is eligible for 1 credit of CPE.

Field of Study: Computer Software and Applications

Hiring and onboarding a new team into an advisory firm

12:00 pm - 12:55 pm ET

Jason Blumer

When your firm is a consulting or advisory firm, it's necessary for your team to operate in high-value ways. Join Jason to discuss onboarding a new team in this environment. Leave with a better understanding of the importance of training, how to onboard a high-performing team, and why clarity is key when hiring consultancy team members.



This session is eligible for 1 credit of CPE.

Field of Study: Business Management and Organization

Share the wealth: Turn bookkeeping tasks into advisory topics

12:00 pm - 12:55 pm ET

Jacob Schroeder, Amy Walker, Beth Melcher

Wondering how to increase your value? Start by turning basic bookkeeping tasks into advisory topics. Join this panel to better understand balance sheets to growth funding, financing options, bill pay to cash flow planning, and profit and loss to growth acceleration.

This session is eligible for 1 credit of CPE.

Field of Study: Business Management and Organization

QuickBooks Online tips and tricks

12:00 pm - 12:55 pm ET

Nayo Carter Gray

In this session for intermediate to expert QuickBooks users, learn tips and tricks to use QuickBooks Online more effectively and efficiently. It will cover best practices for the day-to-day use of Quickbooks, features in QuickBooks Online that users may not be taking full advantage of, and different ways to correct mistakes.

This session is eligible for 1 credit of CPE.

Field of Study: Computer Software & Applications

Simple steps to creating a strong business

12:00 pm - 12:55 pm ET

Pete Potsos, Monte Barnard, Jennie Moore, Laura Redmond

Are you a firm owner searching for simple business strategies to grow stronger? Join QuickBooks partners Bill.com, Expensify, and Practice Ignition for a panel discussion that explores ways to help your company thrive.

This session is eligible for 1 credit of CPE.



Field of Study: Business Management & Organization

Using technology to document and manage your workflow

1:00 pm -1:55 pm ET

Heather Satterley

Learn best practices when documenting your firm and client processes from Heather, a process automation expert. In this session, you'll leverage technology to document step-by-step instructions; create a documentation outline and action plan; and define metrics to measure the effectiveness of your firm's training programs and documentation. Also, discover apps that make process documentation and project management a cinch.

This session is eligible for 1 credit of CPE.

Field of Study: Business Management & Organization

Workshop: The client discovery journey from consult to contract

1:00 pm -1:55 pm ET

Mariette Martinez

Learn the fundamental steps of building a simple sales process from new client discovery to closing the contract. Join this workshop to explore the human-centered selling techniques that are grounded in relationship building and active listening, and take immediate action on a simple sales process plan.

This session is eligible for 1 credit of CPE.

Field of Study: Communications and Marketing

Advanced accounting with QuickBooks Online: Navigating special cases

1:00 pm -1:55 pm ET

Esther Friedberg Karp

Discover how Esther Friedberg Karp harnesses the power and flexibility of QuickBooks Online to service clients with unusual and specific advanced accounting needs. In this session, learn how to record special cases like inventory valuation adjustments, barter transactions, and fully landed costs in QuickBooks Online.



This session is eligible for 1 credit of CPE.

Field of Study: Accounting

The new normal: Getting your finances back on track

1:00 pm -1:55 pm ET

Sabrina Parsons, Paul Lodder, Liz Scott

After nearly two years in a global pandemic, what is the new normal of finances for consumers and companies? In this panel, QuickBooks partners Dext and LivePlan explore the future of financial forecasting, budgeting, reporting analytics, customer insights and more – where we are, where we might be headed, and what tools it will take to successfully get there.

This session is eligible for 1 credit of CPE.

Field of Study: Computer Software & Applications

Attracting new customers through new services

2:00 pm -2:55 pm ET

Michael Ly

Every accounting practice hopes to attract new customers by offering the same set of services. In this session, you will learn about new types of services that your firm can offer to a new set of customers to differentiate yourself in the crowded sea of accounting firms. You'll explore the what and how of these types of services, and how to implement them at your firm.

This session is eligible for 1 credit of CPE.

Field of Study: Business Management and Organization

The strong-minded client: Encouraging clients to listen and change

2:00 pm -2:55 pm ET

Joe Woodard

You deserve a practice filled with clients who respect your processes, honor your deadlines, pay a fair price for your services, and heed your advice. This session focuses on proven methods for you to build healthy and influential client relationships. Attend this session to discover proven techniques to



overcome your clients' resistance to change, earn, maintain and restore client trust, establish and preserve boundaries with problematic clients, and dive into a four-step process for communicating your value.

This session is eligible for 1 credit of CPE.

Field of Study: Communications and Marketing

Curating your business: Make your company a work of art

2:00 pm -2:55 pm ET

Darren Root and John Mitchell

Join Darren Root and John Mitchell as they discuss the shifts experienced by small business over the past 24 months, and the leadership posture that is required to thrive in the next phase of small business in America. This session will cover simple firm products to reduce the friction in your staff process and customer experiences, how to intentionally curate the customers you serve, and how a clearly identified tech stack and internal process drives efficiency.

This session is eligible for 1 credit of CPE.

Field of Study: Business Management & Organization