

The Best QuickBooks® Consultants For Your Business

9 min read



QuickBooks has dominated the business accounting software space since Intuit® launched the program in the 1990s.

Key Takeaways

- **The QuickBooks Quandary:** Self-taught bookkeepers have the ability to use the program's basic features, but most don't know how to tap into its more advanced capabilities...
- **What to Look for in a QuickBooks Consultant:** To get the most out of QuickBooks, you need to be sure you find a consultant with the exact experience to fit your needs. Not all industries are...
- **How to Choose the QuickBooks Consultant That's Best for Your Business:** Lifecycle stages affect your organizational needs, whether you are launching a new company, running a startup, managing a business in a growth or...

In a 2018 interview with [Intuit QuickBooks'](#) then-CEO Brad Smith, he claimed that the company commanded [88%](#) of the market share in the small business accounting space [1].

Today, they continue to grow by expanding their range of platforms, services, and capabilities. The company is doing this through partnerships with business accounting service-adjacent businesses like HubSpot and by broadening in-house offerings from other Intuit-owned companies such as [SalesForce](#), [TurboTax](#), [Credit Karma](#), [Mint](#), and the recently acquired [MailChimp](#) [2].

Additionally, the company is continuously expanding its range of business accounting products and customizing its software suites to meet the ever-evolving needs of businesses of all sizes and types.

According to a recent document filed with the SEC, the current-CEO Sasan Goodarzi wrote, *"[Intuit aims] to become the center of small business growth by helping our customers get paid fast, manage capital, pay employees with confidence, and grow in an omnichannel world."*

Additionally, this filing explains the company's goals of helping small businesses to improve their cash flow with tools provided in [QuickBooks Checking](#). The filing also outlined the company's plan to further disrupt the small business accounting software market with highly affordable QuickBooks Online Advanced products geared specifically toward meeting the needs of small businesses with fewer than 100 employees [3].

QuickBooks currently offers myriad products that are easily integrated with a variety of business management applications and tailored to meet the needs of all sizes and types of businesses from startups and SMBs to large corporations and commerce-based companies to service-based businesses.

Some of the most popular QuickBooks products include a range of QuickBooks Desktop software suites and QuickBooks Online (QBO) access levels in addition to QuickBooks Pro.

The QuickBooks Quandry – Why Businesses Struggle to Integrate QuickBooks Into the Back Office

The popularity of QuickBooks accounting software comes as no surprise to anyone who knows how easy it is to use. However, despite this many businesses do not have their accounting system set up properly, to begin with. This results in the failure to eliminate errors, implement software integrations that provide actionable financial intelligence, or know about and use the advanced features and capabilities available in QuickBooks.

Self-taught bookkeepers have the ability to use the program's basic features, but most don't know how to tap into its more advanced capabilities. Even many certified QuickBooks consultants aren't thoroughly versed on all the software's features or ways to extend its functionality.

Read More: [Financial Reports vs. Management Reports: What's the Difference?](#)

Professional consultants with advanced training and vast experience are able to fully leverage QuickBooks for different industries or lifecycle stages of a business.

When its potential is fully tapped by an experienced, highly trained professional, QuickBooks can do much more than invoicing and account reconciliation; it can help you take your business to the next level by providing the information needed to make data-driven decisions that will increase revenue and drive the growth of the bottom line.

In a space flooded with QuickBooks consulting professionals and services of varying quality, how do you find the right QuickBooks consultant with the training and expertise to help you improve the financial management of your business or organization?

What to Look for in a QuickBooks Consultant

QuickBooks consultants come in all shapes and sizes. To get the most out of QuickBooks, you need to be sure you find a consultant with the exact experience to fit your needs. Not all industries are alike. Not all certifications are alike.

QuickBooks Certifications

QuickBooks offers various levels of certifications for QuickBooks ProAdvisors, which include:

- QuickBooks Certification (the most basic level)
- QuickBooks Advanced Certification

- QuickBooks Enterprise Solutions Certification (the most advanced level)



[QuickBooks Training & Certification](#)

For retail industry clients, there is also a QuickBooks Point of Sale Certification.

These certifications are important, but the most critical qualities to look for in a QuickBooks consultant are experience and training. When shopping for a QuickBooks consultant, look at the professional's level of expertise and experience in your industry.

Experience

Look for a consultant who has a track record of creating custom solutions that demonstrate a real ROI. Pick a consultant with positive client feedback that tells the story of how they did exactly what you are looking for.

Find out how they overcame different challenges – because accounting system design always has limitations – and understand how they helped their clients meet financial goals.

“There was a time in my life that I hated financial reports because the data was off and I couldn't rely on it. Now, the data within our GrowthForce reports are everything I need to make critical decisions about the company to grow.”

How did this booming business unleash the power of QuickBooks? [Read the full story.](#)

The quote above was from a client that wanted to get the most out of their accounting system to see their cash flow more clearly. This included catching up and cleaning up their data, so they could get back on track to increase profits.

Expertise

Instead of hiring one individual person, which means introducing the potential for a single-point failure into your business, consider a [team-based QuickBooks](#) consulting firm. Don't take a chance on getting a consultant that doesn't have the exact experience you need.

If you need a higher level of expertise and a scalable solution, using an accounting firm that provides consulting gives you access to a deep pool of knowledge and expertise. You'll benefit from advanced training and decades of learning from years of experience in various industries.

How to Choose the QuickBooks Consultant That's Best for Your Business

The type of QuickBooks consultant for your business depends greatly on several factors. Before you invest time searching "QuickBooks Consultant" and vetting their qualifications, define what you hope to gain from the relationship.

Determine these three important factors before searching for the perfect consultant:

- **Your Business's Lifecycle Stage** - Lifecycle stages affect your organizational needs, whether you are launching a new company, running a startup, managing a business in a growth or scalability stage, or approaching maturity and decline. Where your business is now and what you expect for the future determines your business needs.
- **Your Needs and Expectations** - What level of assistance and attention do you need from a consultant to be successful? Do you just need a freelance contractor for a small issue? Or do you have bigger challenges that require more immediate and professional attention?
- **Your Business Goals** - What do you hope to achieve with the help of a QuickBooks consultant? Is there a simple issue you need to have fixed? Do you want to streamline operations and improve processes? Are you hoping to optimize your accounting system so you can get accurate data and trust your numbers?

Determining these important factors will help you understand where to search for the right QuickBooks Consultant.

Where to Find a Great QuickBooks Consultant

With internet access, QuickBooks' cloud accounting features, and a basic idea of your company or organization's needs, finding a QuickBooks consultant is simple.

When searching for "QuickBooks Consultants" online, you will find a long list of consulting companies.

You most likely will come across **small, local firms that provide personalized service**. These types of firms are a great option for smaller businesses (under \$1 million in revenue) that serve their local areas and wish to keep their vendors local, as well. One example of a smaller

QuickBooks Consulting firm that shows up in a search is a company called [Siegel Solutions](#), which serves clients in the New England area.

We highly recommend looking for [outsourced](#) professional firms with industry expertise. This type may provide an à la carte menu of [bookkeeping and accounting services with the right expertise](#) to small and mid-sized businesses that are growing. For example, GrowthForce provides the consulting expertise you need while also growing along with your business when a scalable solution is needed.

Get the Most out of Working with a QuickBooks Consultant

Like everything else in life, communication is the key to success when working with a QuickBooks consultant on any level.

There are five things to remember when choosing and working with a QuickBooks consultant:

1. **Clearly communicate the challenges you need help overcoming.** For example, “*I need help catching up and cleaning up my books,*” “*I need help improving my cash flow,*” or “*I need data for pricing to grow my profits.*”
2. **Determine your goals for your company’s near future (expansion or hiring, for example), and the vision you have for growth.** Write it down, then make sure your QuickBooks consultant puts in writing how they can deliver on those goals.
3. **Don’t forget about the people side.** The biggest problems can always be found sitting between the keyboard and the chair. You can pay for the greatest management reporting system in the world, but if the staff doesn’t know how to use the systems properly or read the reports that come out, it’s a waste of money.
4. **The top firms will deliver a customized management reporting system with actionable financial intelligence so everyone has data when they are making decisions.** The biggest value of working with a specialty firm is found in the knowledge they can impart. A top-tier firm should teach you and your managers how to use the information to drive profitability, performance, and growth!
5. **Choose a firm that delivers a system of bookkeeping and accounting that improves the way you do business, streamlines processes, and cuts costs.**

Read More: [Signs You've Outgrown Your Bookkeeper & How It's Seriously Holding Back Your Business](#)

Beyond Bookkeeping: Find Strategic Partners Who Contribute To Growth

With a smart back office, you can start to see an immediate ROI by creating operational efficiencies that drive down costs.

Working with the right Advanced Certified QuickBooks ProAdvisor can help you increase profits, improve cash flow, and reduce risk. That's what we do at GrowthForce – turn our clients' QuickBooks systems into powerful engines for growth!