**The Seven QuickBooks Seminar Post Follow-Up Touches**

**TOUCH ONE: Thank you for attending our class follow-up email**

The logical first touch following your QuickBooks seminar is a thank you to the registrant for attending your class. Remember, consistent touches over time deliver a BIG IMPACT.

**Who:** You – It should come from your email address

**What:** Thank you email

**When**: The same afternoon as your half day class (or the following morning after an all-day advanced class)

**Sample Email:**

Dear {First Name},

Thank you for attending our QuickBooks Seminar. I sincerely hope it was a great use of your time! Typically when seminar attendees get back to the office and begin to implement what they have learned, a few additional questions arise. To ensure we provide outstanding value, we will call in the next 24 to 72 hours to address any additional QuickBooks questions you may have.

Also if it makes sense to have us analyze your current QuickBooks setup, let us know and we will schedule a time to come out and get you off to a fresh start in the software.

It was a pleasure to meet you and I believe your company has great growth potential. If my firm can be of service to you in the future, we would love the opportunity to become part of your success.

Sincerely,

Pam Brown

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931-258-9654

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**TOUCH TWO: Phone Follow-up**

The key to this follow-up step is that the seminar attendee is EXPECTING your call. Having worked in the accounting industry as long as we have, we KNOW what you are comfortable and NOT comfortable with, so this campaign is designed to work within your comfort level. It is important to create this expectation the day of your seminar by stating during your introduction, AGAIN in your closing and in your first touch thank you email. Many of our affiliates have a sign-up sheet with time slots and get the calls scheduled before the end of the seminar. In our boot camp, you learned how to do this during the registration period.

Here is how you can present it in the introduction and closing comments. We have written it into the first touch “Thank You” email:

“I am going to cover a lot of very important information today. I will stay until the last question is answered, but when you get back to the office and begin to implement what you have learned, additional questions may arise. Included in your fee is a 15 minute follow-up call (or 30 minute consultation-your choice) to address these questions. I will contact you in the 2 to 3 business days following the class, so write down your questions as they come up.”

This is important so the call is not uncomfortable for you to make and never feels “salesy”. It is important to limit the scope of this engagement UP FRONT. If you get stuck on the phone and don’t know how to politely get off, simply state, “I apologize I have a scheduled appointment with a \_\_\_\_\_ (bookkeeping, CFO, tax – whatever type of service you are promoting) client in a few minutes and allot only 15 minutes for these calls. I will follow-up with you later in the day via email with suggestions.”

**Who:** YOU – Do not delegate this task to an employee. You are the person in your firm who should be managing client relationships. Your business prospect needs to know they will have YOUR full attention.

**What:** Follow-up phone call

**When:** Sometime within the first 2 to 3 business days following the class.

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**TOUCH THREE: Invite to Advanced Class**

As a summary to where you are in the process, your seminar attendee has received a pre-call, attended your class, and received a thank you email as well as a follow-up phone call. If the attendee has not hired you by this point for additional services OR you are not interested in picking them up as a client, invite them to your advanced QuickBooks Training class as an additional opportunity to close a sale AND/OR generate training revenue. You can link to the advanced course outline on the QBExpress website, or of course if you have it posted on your own website, you can link to your site.

**Who:** Staff Member in charge of Getting Seminar Promotions out the Door

**What:** Email Invite

**When:** 7 days following the class

**Subject Line:** Ready for Phase Two of your QuickBooks Training?

Dear {First Name},

Our team members hope you have put your Introduction to QuickBooks Training to good use and are already realizing the benefits! I wanted to let you know about our upcoming Phase Two 4-Hour QuickBooks Training session on Sept 19th from 9 AM to 1 PM. We are offering a 20% discount to those who attended our Introductory course if they sign up by Sept. 12th.

For a detailed course outline, go to <http://www.qbexpress.com/courses/advanced-quickbooks-training>

I have attached the order form and please let me know if you have additional questions.

Hope to see you there!

Pam Brown

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**The Seven QuickBooks Seminar Post Follow-Up Touches**

**Touch FOUR: Direct Mail Piece Promoting ONE Service**

A significant percentage of QBExpress affiliates are promoting outsourced bookkeeping services and the following marketing piece is related to targeting those clients. Contact the marketing team for customized content if there is a service other than bookkeeping/accounting you would prefer to promote, such as business coaching, financial planning or CFO services.

IMPORTANT TIP: By now you should have located the need or pain of the prospect A CRITICAL COMPONENT of successful marketing. Customize the direct mail piece to speak DIRECTLY to their pain point. See the example to gain a clear understanding.

IMPORTANT OUTSOURCED BOOKKEEPING TIP: Too many accountants are making the mistake of making outsourced bookkeeping feel like a technology sale. NOTE that we do NOT mention outsourcing and DO NOT mention technology, but rather the TRUE VALUE YOU PROVIDE.

**Who:** YOU **–** The letter should bear your signature (if you have staff members delegate this task)

**What:** Direct mail piece to seminar attendees promoting the service you most want to sell

**When:** 14 days following the class

Date

Contact

Company

Address

City, State, Zip

Dear {First Name},

As a past QuickBooks seminar attendee, I want to make you aware of my firm’s ability to solve a growing problem many of our clients are experiencing. That problem is finding, training and THEN keeping experienced, highly qualified and conscientious bookkeepers. Competition for competent bookkeepers continues to be tight and many bookkeepers that have a good understanding of debits and credits are overwhelmed by technology advances in accounting software; advances that can significantly help a business prosper. If you find yourself facing any of the challenges mentioned above, I have your solution.

First, as a fellow small business owner and business consultant, I understand your need for accurate and timely data on which to base minor and major business decisions. I can provide both and far more. My team will teach you exactly how to use your financial data to help your company prosper and can provide consistent oversight and advice on how to improve your business operations. The best news is, we can do this for less than the cost of an in-house bookkeeper. You will never have to worry about hiring, training, firing and overhead including payroll taxes, computers, sick days, vacation days, health insurance, etc. in the bookkeeping position again.

If you are interested in transferring this non-core business process to highly skilled experts who can help you attain your financial goals, give me a call. I will explain our best practice process and procedures for delivering high value day in and day out.

I would appreciate the opportunity to show you how we can help. I can be reached at 931-258-9654 or email pam@qbexpress.com

Sincerely,

Pam Brown

**The Seven QuickBooks Seminar Post Follow-Up Touches**

**Touch Five: QuickBooks Tips Email**

This touch is just a gentle reminder that you are there to provide ongoing support. The tips are simply an example and include tips that are relevant to their firm.

**Who:** The email should come from your email address

**What:** QuickBooks tips email touch

**When:** 21 days following the class

**Sample Email Content**

**Subject Line**: {First Name} These QuickBooks Tips Will Help

Hello {First Name},

I believe these simple tips will help you further streamline your processes in QuickBooks and consequently deliver more to your bottom line. While we covered some of these in class, I believe these simple tips are worthy of a reminder.

* **Customize your icon bar** **for increased efficiency** - To **remove** an icon go to *View* /*Customize Icon Bar* and then choose the icon you want to remove. Now click delete. To **add** icons go to the *View/Customize Icon Bar* and choose the item from the list. You can change the descriptions and labels if you wish. Click OK. To **modify** Icons, go to “View/Customize Icon Bar and select the items you would like to modify and click Edit to make changes. Now click OK.
* **Get comfortable with shortcut menus** - To perform common QuickBooks tasks related to a window, right-click to display a shortcut menu. Here are a few examples: In a register, right-click a specific transaction- In a list, right click a specific item and while in a form, display a transaction and then right click on any blank area in the form for shortcut menus to appear.
* **Utilize the QuickMath Calculator** – This is a cool and handy tool many QB users are unaware exists. Click inside a field where you want to perform a calculation, such as the amount field on a check. Simply press the **=** sign and a min-tape appears. Type in numbers you want to calculate, followed by the appropriate sign (\*, /, +, -, or =) Click C once to clear an entry and twice to clear the entire calculation.
* **Set program preferences** – The QuickBooks setup wizard while useful, is not comprehensive. There are a lot more decisions you should make that are not built into the wizard that will streamline your processes. Click on *Edit/Preferences* to open your Preferences window and set your preferences for each area of QuickBooks that is relevant to your company.

Call anytime if you need additional QuickBooks, bookkeeping or accounting help. We would love to be a part of your success story!

Sincerely,

Pam Brown

**The Seven QuickBooks Seminar Post Follow-Up Touches**

**Touch Six: Cross Referral Letter**

This touch is highly effective and the letter should be personally signed and sent in a hand addressed envelope. Remember, with an average class size of 5, this is NOT time consuming or expensive, yet delivers high impact. Basically the letter conveys that you have clients that could use their services and most likely they have clients that could use yours; would they like to further the dialogue on how you could be mutually beneficial to each other. “I’ll scratch your back if you scratch mine.” The prospect will view you in a different light when they consider the fact you meet a lot of business owners and could be a great source of business leads for their company. The thinking changes to “What can I do for you in return to get this cross referral relationship in place?”

Because what you are selling is a relationship of trust, referrals are a good source of business. They are not enough to move your company forward with the type of growth potential you are capable of achieving, but it is a very important piece of your overall marketing strategy. For this to be effective, it must be systemized. Just saying “Let’s refer clients to each other” never really produces much. An exact methodology does with clearly defined steps such as posting referrals on your websites, sending an email or letter to clients, etc. Make sure it is CLEARLY DEFINED as to what each of you will do or it won’t be effective.

**Who:** Printed and addressed by staff, signed by YOU

**What:** Personal letter to appropriate business owners that attended your class regarding establishing a cross referral system

**When:** 6 weeks following class

**Sample Content**

Dear {First Name},

I enjoyed getting to know you at our recent QuickBooks seminar and learning about your company. I believe we can be of significant benefit to each other in regards to growing our firms. I see hundreds of individual as well as business clients each year, many of which would be excellent prospects for your business. I assume you have clients that could benefit from my services as well.

If you are interested in furthering the dialogue, I’d like to schedule a call or meet for lunch to ask you about your target market, what problems they experience and other aspects that make them a Grade A client so I have a better understanding of the types of clients to refer. I would like to explain the same to you about the type of clients I am looking to attract to my firm.

If you are interested in furthering the dialogue, please email me at pam@qbexpress.com or call 931-258-9658.

Warm Regards,

Pam Brown

**The Seven QuickBooks Seminar Post Follow-Up Touches**

**Touch Seven: QuickBooks Review – Send 8 Weeks Out**

This touch shows concern for making sure your attendees are still on track. It is an offer to conduct a review of their current usage of QuickBooks to ensure maximum accuracy and efficiency in their processes. As always, if you want to include a personal comment about their specific business, it is always a good idea.

**Who:** This email should be signed by you and come from your email address.

**What:** QuickBooks Analysis Email

**When:** 8 weeks following the seminar

**Sample Content**

Dear {First Name},

It has been eight weeks since you attended our QuickBooks class and I wanted to check in with you to see how things are going! We hope you have used our training to implement best practices processes and procedures and are experiencing increased efficiencies and time savings.

If you believe it would be beneficial for us to conduct a QuickBooks analysis of your current usage to ensure maximum accuracy and efficiency in your processes, give us a call. I have attached our “50 point Checkup Checklist” to give you an idea of what our analysis would entail.

Give me a call or send an email if you are interested in learning more. This cost effective analysis and repair makes sense for many business owners.

Sincerely,

Pam Brown

Just the Books, LLC

931-259-8954

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[www.qbexpress.com](http://www.qbexpress.com)

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Rating** |  |  |
|  | **1 to 10** |  |  |
|  | **Severe to****No Problem** |  | **QuickBooks 50 Point Checkup** |
|  |  | **Foundation** |
| 1 |  |  | Is the Chart of Accounts optimally designed for meaningful financial reporting? |
| 2 |  |  | Is the item list properly designed for the business? |
| 3 |  |  | Are the items posting to the correct General Ledger accounts? |
| 4 |  |  | Are memorized transactions being properly used to minimize data entry? |
| 5 |  |  | Is there a balance in Opening Balance Equity? |
| 6 |  |  | Are there balances in Unclassified Accounts? |
| 7 |  |  | Are books in balance? |
| 8 |  |  | Do books match last tax return? |
| 9 |  |  | Are classes being properly used to provide useful financial information segmentation? |
| 10 |  |  | Are preferences set correctly to obtain the desired results? |
|  |  | **Banking** |
| 11 |  |  | Is there a balance in Undeposited Funds? |
| 12 |  |  | Are there stale dated checks or deposits included in the bank reconciliation? |
| 13 |  |  | Are reconciliations timely and accurate? |
|  |  | **Credit Cards** |
| 14 |  |  | Is account activity posted? |
| 15 |  |  | Is account activity posted in a timely manner? |
| 16 |  |  | Are Credit Card Accounts properly reconciled? |
|  |  | **Payroll and Payroll Taxes** |
| 17 |  |  | Are payroll items properly set up and posting to correct accounts? |
| 18 |  |  | Are liabilities shown in Employees/Payroll Liabilities accurate? |
| 19 |  |  | Do liabilities shown in Employees/Payroll Liabilities match the General Ledger? |
| 20 |  |  | Is Time Entry being used to minimize data entry and maximize accuracy? |
|  |  | **Sales Taxes** |
| 21 |  |  | Are Sales Tax Items properly set up and posting to correct accounts? |
| 22 |  |  | Are liabilities shown in Vendors/Sales Tax Liabilities accurate? |
| 23 |  |  | Do liabilities shown in Vendors/Sales Tax/Sales Tax Liabilities match the General Ledger? |
|  |  | **Accounts Receivable** |
| 24 |  |  | Are Customer files properly setup? |
| 25 |  |  | Are the same Customers listed under multiple names? |
| 26 |  |  | Are invoicing & Credit Memos properly used? |
| 27 |  |  | Are Cash Sales handled correctly? |
| 28 |  |  | Are credits on accounts being properly applied against invoices? |
| 29 |  |  | Are Sales Orders being used appropriately? |
|  |  | **Accounts Payable** |
| 30 |  |  | Are Vendor files properly setup? |
| 31 |  |  | Are the same Vendors listed under multiple names? |
| 32 |  |  | Are Bills & Credit Memos properly used? |
| 33 |  |  | Are Bill payments being properly handled? |
| 34 |  |  | Are payments on account being properly applied against bills? |
| 35 |  |  | Is 1099 tracking & reporting being handled correctly? |
| 36 |  |  | Are Purchase Orders being used appropriately? |
|  |  | **Reports** |
| 37 |  |  | Is there a set of daily reports to keep management properly informed about the health of the business? |
| 38 |  |  | Have reports been appropriately customized to provide maximum management information? |
| 39 |  |  | Have Management Reports been saved to a Management Group for ease of retrieval on demand? |
|  |  | **Planning and Budgeting**  |
| 40 |  |  | Have budgets been developed to provide targets for the company? |
| 41 |  |  | Have budgets been entered into QuickBooks for easy comparison to actual results? |
| 42 |  |  | Is cash forecasting being done to insure proper cash flow management? |
|  |  | **Access to Your Books** |
| 43 |  |  | Is your data properly secured with the use of passwords? |
| 44 |  |  | Do you have 3rd party analysis taking place to minimize the risks of fraud and to help insure accuracy? |
| 45 |  |  | Can your books be easily accessed remotely by management and advisors? |
|  |  | **Job Costing (if applicable)** |
| 46 |  |  | Is a useful item Code or Class Code structure in place? |
| 47 |  |  | Are Estimates being compared to actual results? |
|  |  | **Inventory (if applicable)** |
| 48 |  |  | Are inventory items properly set up? |
| 49 |  |  | Does quantity on hand match reality? |
| 50 |  |  | Is valuation accurate? |