

# Live Webinar Series

Discussing QuickBooks & Apps  
that work with QuickBooks



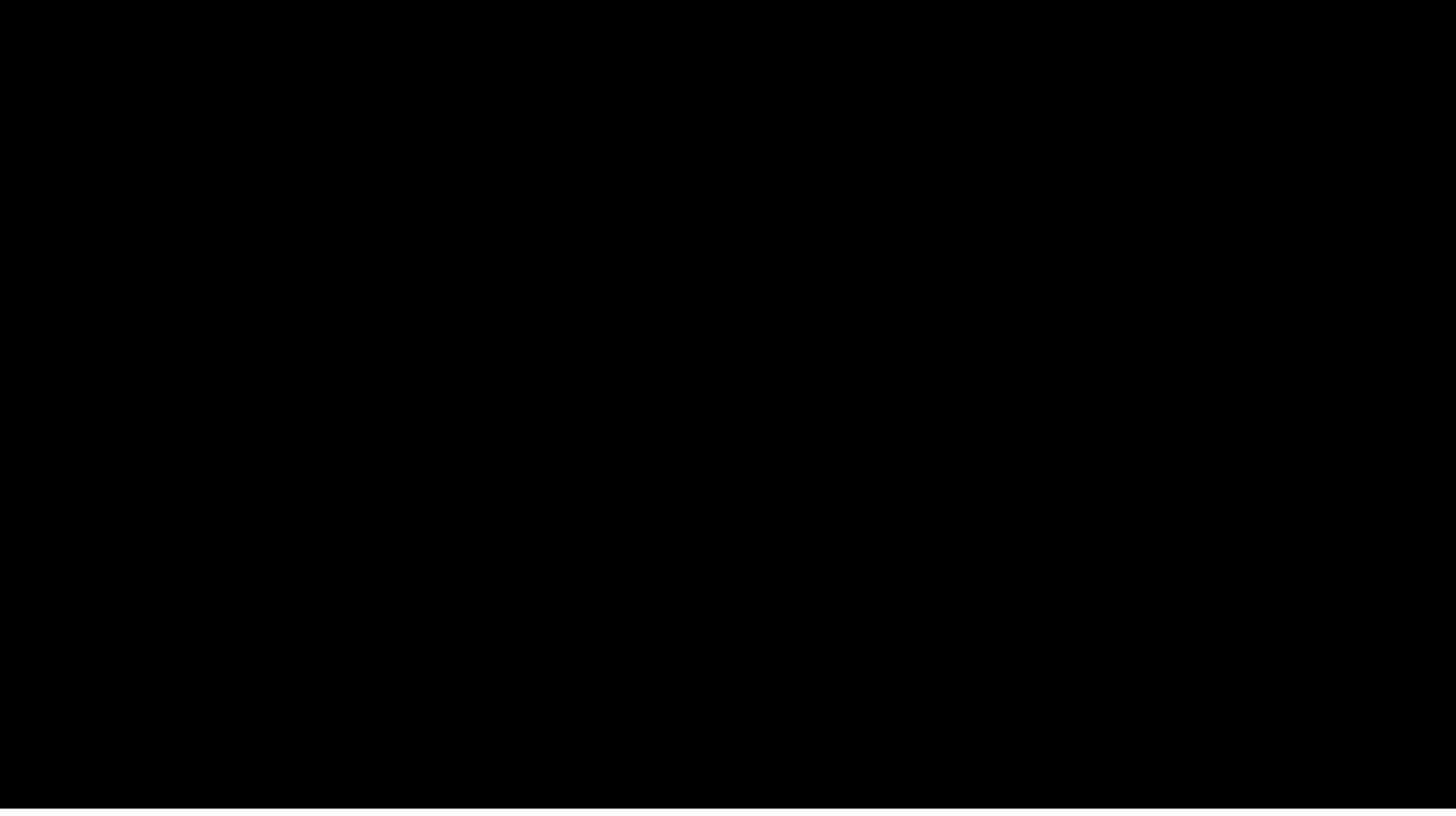
**Sharrin**



**Every Other Tuesday**  
**9am PT | 12pm ET**



**Dan**



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# Unfollow The Rules to Clone & Conquer

## Discussions with Sharrin



Sharrin



Tuesday 2/17  
9am PT | 12pm ET



Dan

# Dan DeLong

- **Owner** - Danwidth and [schoolofbookkeeping.com](http://schoolofbookkeeping.com)<sup>™</sup>
- Worked at **Intuit** for nearly 18 Years
- **Co-Host** - QB Power Hour
- **Co-Host** Workshop Wednesdays
- **Feature Deep Dive Guest Host** - The Unofficial QuickBooks Accountant Podcast
- **Admin Facebook Group** ~17,800 members  
<http://facebook.com/groups/qbpowerhour>
- **Tech Editor** of **QBO for Dummies** (since 5th edition - 2019-2025) and **QuickBooks All-In-One**
- **Top 10 ProAdvisor 2021** - Social Media



# Sharrin Fuller



- **Founder of Glass Wallet Ventures** where accounting pros go to stop doing it all and start leading
- **Built, scaled, and sold multiple 7-figure firms** using the exact methods she now teaches
- **Creator of the Clone & Conquer Method™** a no-fluff system for building a team and backend that runs without you
- **Host of *Start 2 Scaling: The \$1 Million Journey*** podcast and creator of the Remote Team Roadmap™
- **Top 100 ProAdvisor for three consecutive years** and 2025's Top QuickBooks Educator
- **Runs 3 companies in just 3 days a week** and helps firm owners do the same with strategic advisory, courses, and her Community Hub

# QB Power Hour Webinars Details

**Every Other Tuesday at 12:00 ET**

## Upcoming Webinars:

- 2026 QBPH Webinars are no Longer eligible for CPE Credit through Earmark App: Historical Webinars are still eligible for 1 year ([Channel on Earmark](#))

## Show Topics:

- QuickBooks tips, what's new, troubleshooting, etc.
- Marketing, pricing, apps and more
- Topics to help accounting professionals succeed in their business

## Where to Find our Resources:

- PDF of slides
- Past Recordings and Podcast
- and other Resources

[www.qbpowerhour.com/resources](http://www.qbpowerhour.com/resources)



# **Intuit News: Intuit Intelligence Chat Unfollow The Rules to Clone & Conquer**

- **Foundations for the Future**
- **The Role of Failure**
- **Dealing with Burnout**
- **Building Sustainable Systems**



## Polling Question 1 (2 Questions)

What version of QuickBooks do you use to support your clients?

- QB Online Only
- QB Desktop Only
- Both
- Other Accounting/Ledger Software
- N/A



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**method**

# Intuit News: Intuit Intelligence Chat



# Intuit Intelligence Chat

## What's Happening?

- Live 2/6/2026
- All SKUs (except IES)
- 25 Questions per Month
  - 100 Questions \$10/mo
  - Not sure what counts as Questions
- Companion (Side bar)



**This**

**Not This**



# Unfollow The Rules to Clone & Conquer



# Foundations for the Future

# Foundations for the Future



## Early Childhood Lessons

The core values and experiences that shape who we become and our approach to learning.



## Turning to Bookkeeping

Embracing a structured profession and the language of business.



## Building Something worth Selling

Creating a valuable, scalable asset with a clear exit strategy.

# The Role of Failure

# The Role of Failure

- **Learn from Failures:** Each failure is data, not defeat.
- **Trust Your Gut:** If something feels wrong, it probably is.
- **Set Clear Boundaries:** Compassion should not override business sense.

Good decisions come  
from experience.  
Experience comes  
from making bad  
decisions.

-Mark Twain

# Dealing with Burnout

# Dealing with Burnout



## Recognize the Signs

Identify symptoms like fatigue, irritability, and lack of motivation.



## Set Boundaries

Establish clear work-life boundaries to protect personal time.



## Prioritize Self-Care

Incorporate regular exercise, healthy eating, and adequate sleep.



## Take Breaks

Schedule short breaks throughout the day to recharge.



## Seek Support

Talk to colleagues, friends, or a professional for guidance.



## Focus on What Matters

Identify and prioritize high-value tasks to reduce overwhelm.



## Embrace Flexibility

Allow yourself to adjust your workload and expectations as needed.



## Reflect and Reassess

Regularly evaluate your goals and workload for alignment with your values.

## Polling Question 2

**Do you feel overwhelmed with  
Burnout?**

- Yes
- No
- N/A

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 Qbox

# Build Sustainable Systems



## Document Processes

Recording tasks and creating templates helps in delegating effectively.



## Standardize Operations

Streamlining tools and workflows reduces confusion and enhances efficiency.



## Embrace Technology

Leveraging automation tools like Zapier can minimize repetitive tasks and free up valuable time.

# The Importance of Autonomy



## Choose Wisely

Select projects that align with your values and strengths.



## Empower Your Team

Trust your employees to make decisions and solve problems independently.

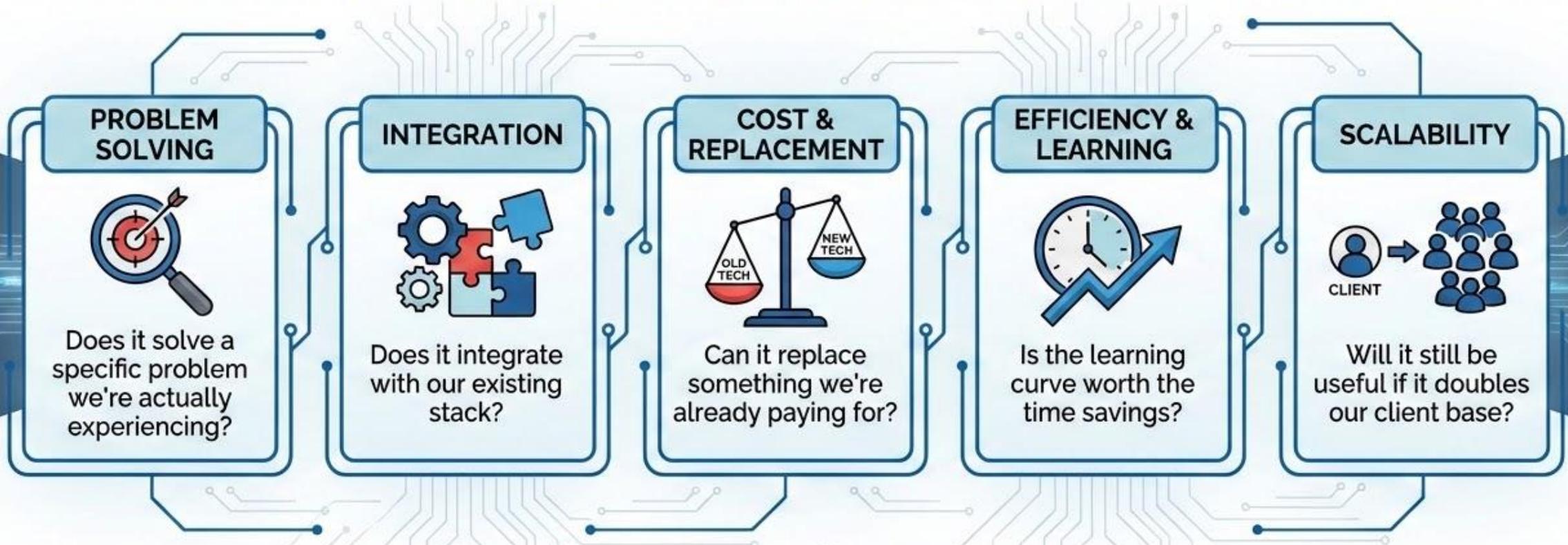


## Value Human Connection

Even as automation increases, maintaining personal relationships with clients remains essential.

Framework for New Tech

# Framework for New Tech



# The Three Day Work Week



## Intentional Scheduling

Every hour counts, and meetings should have clear purposes.



## Set Boundaries

Protect your time by establishing non-working days.



## Focus on High-Value Tasks

Prioritize work that directly contributes to revenue and client satisfaction.

Community for accounting firms  
ready to get out of their own way

- Spot what's slowing your business and fix it
- Learn to delegate, systematize, and run smoother
- Clone what works and grow without burning out

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## Polling Question 3

Was this information useful?

- Yes
- No
- N/A

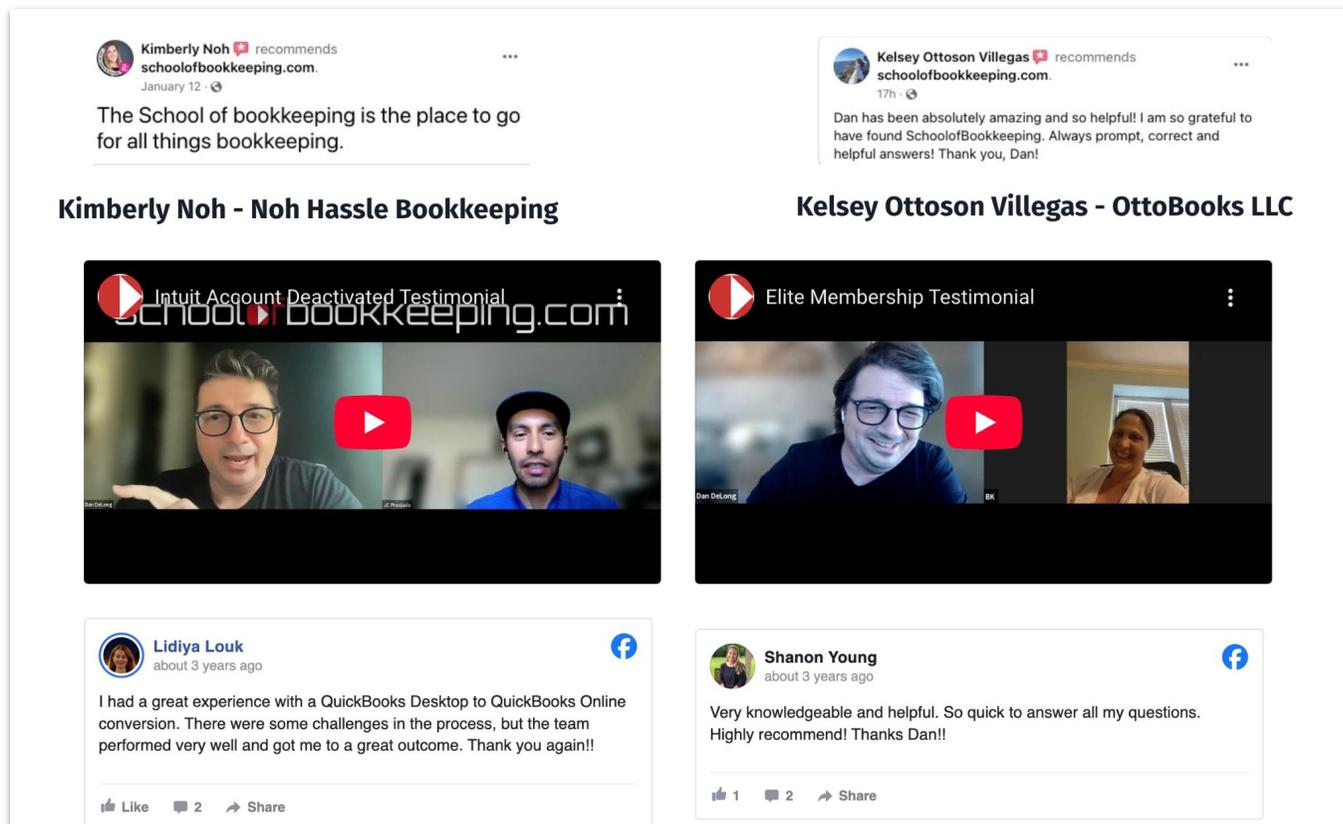
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 Avalara  
Tax compliance done right

# Quick Answers at schoolofbookkeeping.com

- Chat/Email Support
- Day/Monthly/Annual Options
- Bundle with QBO subscriptions

[Learn More](#)



The screenshot displays four testimonials from social media. The top row features two recommendations from Kimberly Noh and Kelsey Ottoson Villegas, both recommending schoolofbookkeeping.com. Below these are two video testimonials: 'Intuit Account Deactivated Testimonial' and 'Elite Membership Testimonial'. The bottom row shows two Facebook posts: one from Lidiya Louk about a QuickBooks conversion experience, and another from Shanon Young praising the team's helpfulness and quick response.

**Kimberly Noh - Noh Hassle Bookkeeping**

**Kelsey Ottoson Villegas - OttoBooks LLC**

**Lidiya Louk**  
about 3 years ago

I had a great experience with a QuickBooks Desktop to QuickBooks Online conversion. There were some challenges in the process, but the team performed very well and got me to a great outcome. Thank you again!!

**Shanon Young**  
about 3 years ago

Very knowledgeable and helpful. So quick to answer all my questions. Highly recommend! Thanks Dan!!

# QB Power Hour Store



Dad Hat with Leather Patch (Rectangle)

\$19.35



Unisex Softstyle T-Shirt

\$18.75



QB Power Hour - Magnetic Induction C...

\$49.50



QB Power Hour Color Morphing Mug, 1...

\$12.99



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- Heat Activated Coffee Mugs
- T-Shirts
- Hats

[Want to Create Your Own Swag Store?](#)

# Upcoming Events

- QB Power Hour Webinar Series – every other Tuesday 12:00 pm Eastern  
<http://qbpowerhour.com>
- Check the [website](#) for more upcoming events
- QuickBooks vCon and webinars:  
<http://qbtrainingevents.com>



# Appendix

# Housekeeping

## QUESTIONS



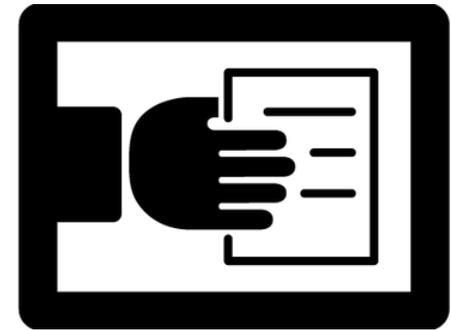
PLEASE USE THE Q&A  
ICON FOR QUESTIONS  
ON TODAY'S TOPIC

## COMMENTS



IF YOU HAVE  
COMMENTS, USE  
CHAT

## HANDOUTS



ALL HANDOUTS ARE  
[HERE](#) OR ON OUR  
[WEBINAR ARCHIVE](#)

# Michelle L. Long, CPA, MBA

- **Owner** of Long for Success, LLC, Kansas City, Missouri
- **International speaker** – Intuit Trainer/Writer Network
- **Author** – 5 Books (Available on Amazon), numerous Intuit Academy courses, co-author QB and QBO Advanced Certifications
- **Co-Host** – <http://QBPowerHour.com>
- **Facebook Group** ~17,000 members  
<http://facebook.com/groups/qbpowerhour>
- **Linkedin Group** ~160,000+ members – <http://tinyurl.com/qbgroup>
- **Honors & Recognition** – Most Powerful Women in Public Accounting, Top 100 Small Business Influencer, Top 10 ProAdvisor (Top Trainer/Writer & Top Social Media), SBA Financial Services Champion & more

Long  
for Success LLC

