

Live Webinar Series

Discussing QuickBooks & Apps
that work with QuickBooks



Every Other Tuesday
9am PT | 12pm ET

Spot

Dan

Books to Books: From Best Seller to Balance Sheet

AI Growth
Advisor 
Powered by  autymate

250 AI Profit Playbooks for Bookkeepers
Actionable, book-proven strategies to boost your
pricing, margins, and cash flow.



Tuesday 12/9
9am PT | 12pm ET

 autymate



Sharrin

Bryan

Dan

Dan DeLong

- **Owner** - Danwidth and schoolofbookkeeping.com™
- 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



Matthew “Spot” Fulton



- Founder of **Parkway Business Solutions**
- **QB Community Live** Facebook group
- Big Data Manipulator
- Workflow Design Nerd with API Experience
- Top Educator/Trainer/Writer 2021
- Top 100 ProAdvisor



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

Bryan Perdue



Bryan Perdue

CEO & Founder

 Autymate (AI Growth Advisor)

Trailblazing innovator revolutionizing accounting through AI. Built the world's most comprehensive business intelligence ecosystem, connecting 500+ applications to transform complex data into actionable insights.

 BPerdue@Autymate.com

 [linkedin.com/in/bryanperdue](https://www.linkedin.com/in/bryanperdue)

 [Autymate.com](https://www.Autymate.com)



[Prior Workshop](#)

QB Power Hour Webinars Details

Every Other Tuesday at 12:00 ET

Upcoming Webinars:

- QBPH is now eligible for CPE Credit through Earmark App - CPE quiz will be available ~5 business days after webinar
([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

Want CPE for this Session?

- 1 Get the Earmark App
- 2 Take 5 Question Quiz
- 3 Receive CPE Certificate

This session will be recorded and available on demand, we'll email you when the CPE quiz is ready.

 EARMARK

earmark.app

Intuit News:

- Intuit Intelligence & Human Intelligence

Leveraging AI for Advisory

- Current State of the Industry
- Applying Books to Books
- Demo/Use Cases
- Q&A



Polling Questions

Tell us about your business

- ☐ How many Online Clients do you manage?
- ☐ Describe your Role
- ☐ What services do you provide? (Multiple Choice)
- ☐ What is your firm's biggest barrier to offering strategic advisory services? (Single Choice)
- ☐ How is your firm utilizing AI today?

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method



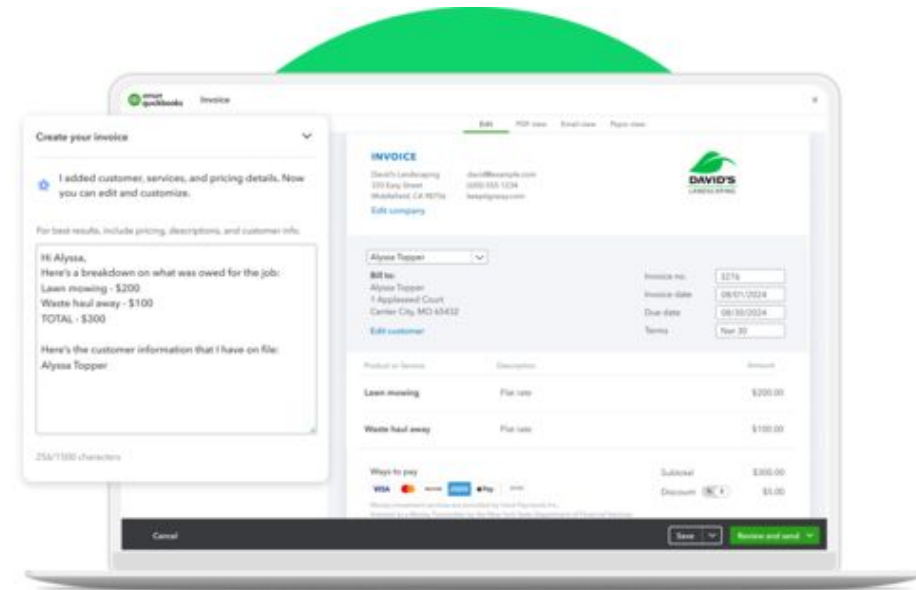
Intuit News: Intuit Intelligence & Human Intelligence



Intuit Intelligence & Human Intelligence

What's Happening

- Intuit Assist (Nov '24) evolving into Intuit Intelligence
- The potential
 - Turn conversations and documents into estimates, invoices or bills
 - Get Paid faster
 - Move from getting paid to automating books, with less errors
 - Connect with an **expert****



[Nov '24 Press Release](#)

Who is the “Expert?”

Intuit Intelligence & Human Intelligence

Humans are still the Experts

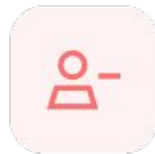
- Automation and AI are the tools
- Humans are the interpreters
- Intuit's Expert Platform
 - Uber-esque
 - Narrow Scope



[Blog Article](#)

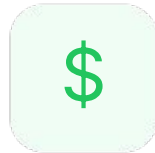
State of the Industry

The Crisis Facing Every Accounting Firm



30%

Reduction in Talent Pool



65%

Firms Competing on Price



82%

Fear AI Will Replace Them

Bottom Line: You are being asked to do more with less

The Commodity Crisis



"10 years ago, your bookkeeper was one of your most trusted advisors. Now

'bookkeeper' is almost a derogatory term because it's become a commodity."

How do we evolve from commodity to strategic advisor?

DIY Self Paced Study – ProAdvisor Training

 ProAdvisor Academy

[My Hub](#)

[Programs](#)

[Learn](#)

[My History](#)

[Resource Hub](#)

[FAQ](#)

[Notifications](#)

[D](#)

Learning pathway

Welcome to your personalized Learning pathway! We've curated a list of courses and learning plans tailored to your needs, covering everything from advanced financial reporting to client advisory services and essential soft skills. Start your journey to becoming a more proficient and confident accountant today!



Client Advisory Services Foundation

The programs in this learning pathway will bolster your core accounting skills, develop proficiency using the Intuit platform, deepen your understanding of AI, enhance your communication, and develop a clear understanding of key financial statements. On completion, you'll earn a badge recognizing your achievement.

[Watch the introduction video.](#)

[More details](#)

[Enroll](#)



0/5

Earn a CAS Certificate

5 more to unlock

Intuit has been saying this for years



From Commodity to Premium Advisory

Before AI Advisory

- ✗ \$\$\$/month commodity service
- ✗ Easy for clients to leave
- ✗ Junior staff = limited value
- ✗ Competing on price

After AI Advisory

- ✓ \$\$\$\$+ premium advisory
- ✓ Sticky, strategic relationships
- ✓ Junior staff = senior insights
- ✓ Competing on value

Quick Poll #1

How many of you view yourself as **leaders or experts** in
the industries your clients are in?

Not accounting, but the actual industries you serve

Quick Poll #2: Now Let's Be Honest...

How many of your **junior to mid-level staff** are experts
in the industries you work with?

To the point where they can confidently give advisory services?

This is the gap we're solving today

The 75% Gap

85%

Owners are experts

10%

Staff can advise

This gap is costing you **\$1,000s per client**

Every. Single. Month.

What If...

- 💡 Your **junior staff** could deliver advice like **Warren Buffett**?
- ① You had **7,000 proven strategies** from the world's best business minds?
- 🕒 You could apply them in **3 minutes**, not 3 hours?
- ✅ Your clients achieved **95% success rate** on their goals?

The Advisory Paradox



"Most firms know how to get data in one place...

...but they don't know what to do with it."

You serve 10+ verticals. 5 real estate. 3 restaurants. 4 e-commerce.

How can anyone be an expert in all of them?

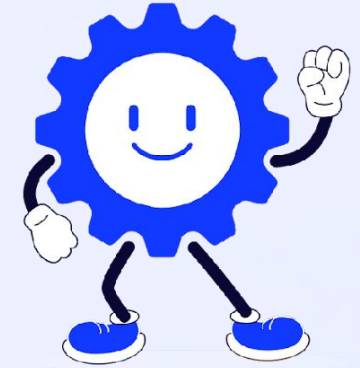
Autymate LLC

AI Growth
Advisor



INTUIT
quickbooks

AI Growth Advisor and Intuit QuickBooks Online



The Problems

Overwhelmed Bookkeepers

- ✗ Drowning in data
- ✗ No time for analysis
- ✗ Can't advise clients
- ✗ Low-value work only

+

AI-Powered Tools

AI Growth Advisor

- ✦ Unified scorecards
- ✦ Instant insights
- ✦ 7,000+ strategies
- ✦ Automated advisory

=

Strategic Advisor Status

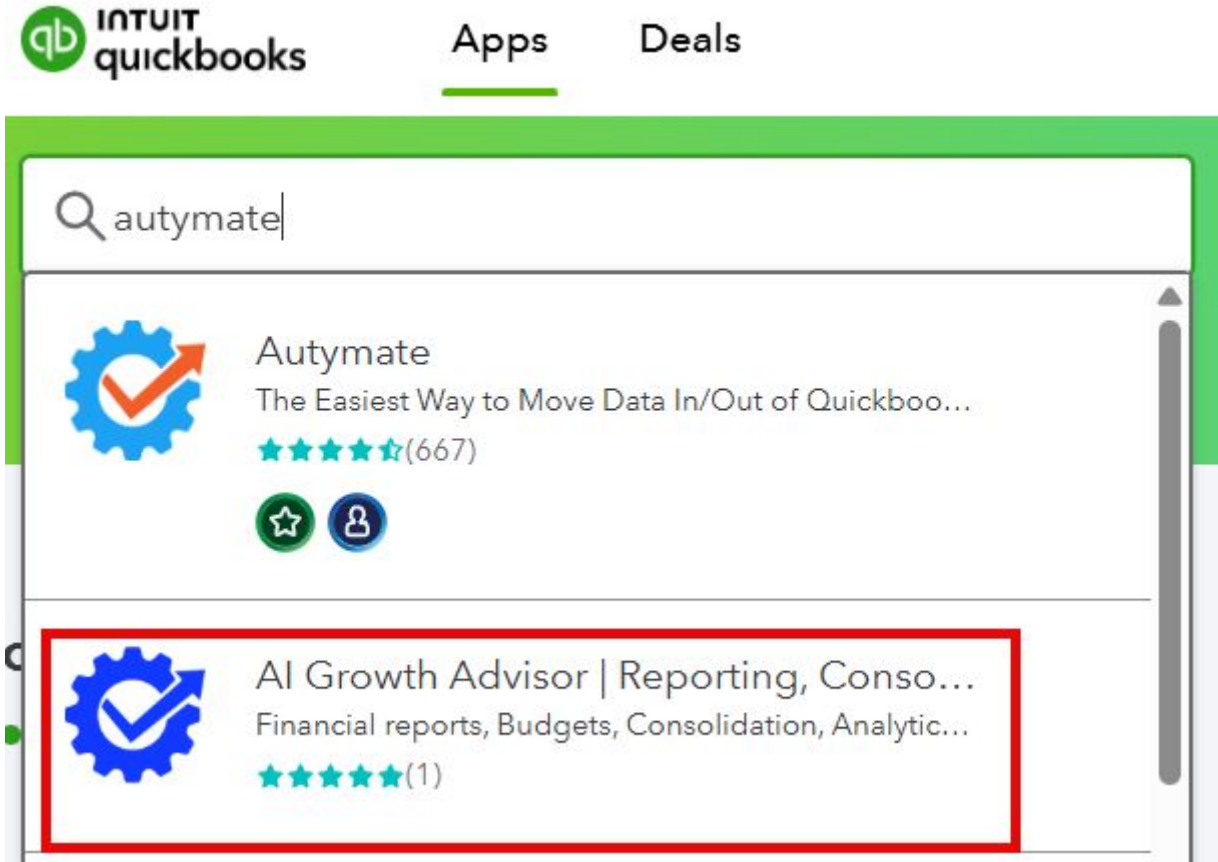
AI Growth Advisor

- ✓ 3X revenue/client
- ✓ Premium pricing
- ✓ Indispensable partner
- ✓ Future-proof practice

95% Success Rate

About Autymate LLC

Trusted by Thousands of Businesses



AICPA
SOC[®] 2
Type I

Thoropass[™]



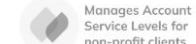
Success Stories That Speak Volumes

The AI Business Coach transformed my approach to accountability.

linuteman
ess.



school of
bookkeeping.com



100s of hours monthly

Time Saved



0 Errors

Reduced Errors



Monthly Affiliate Payouts

Increased Efficiency for

School of Bookkeeping Saves Hundreds of Hours Monthly via Accounting Automation

Improve your QuickBooks invoicing process with Autymate's advanced field mapping and column mapping solutions. Our interface resembles QuickBooks and allows you to map specific columns to fields, including Bill-To and Ship-To, customer information, and product/services. Our solution preserves the integrity of your CSV files and eliminates the need for manual invoice editing. Our custom dashboard provides insights into the time saved and the number of files processed. Discover how Autymate can save you time and money by automating repetitive accounting processes. Visit Autymate.com/amt today to learn more or schedule a whiteboarding session with us.




Dan DeLong

Chief Content Creator at Schoolofbookkeeping

I've used other importing utilities to streamline processes, and this one is so much better. For example I have a CSV that I have to download in order to import invoices. We do it monthly and with the "other guys" I still had to massage the CSV file (sometimes taking 30 minutes to an hour). With Autymate, I download the CSV, upload it without manipulation, and the import happens "auty-magically." Support is great as well. definitely bring them your challenges, and they will come up with a way!!

We Do the Reading For you So You Can Advise

Read the summary and act like an advisory pro from day 1



Auty Takes The Top Business Book Strategies and Applies to Your Business!

7,000+ Proven Strategies Ready To Implement Today	1,500+ Business Summaries From Leading Authors	5 minutes Strategy To Implementation Faster Than Making Coffee
---	--	--

[Start Your 7 Day Free Trial!](#)
(No Credit Card Required)

[Learn More](#)

Polling Question 2

Do you have time to keep up with Strategies to Advise your Clients?

- ☐ N/A - I have a my own strategies and processes that I implement with my clients
- ☐ Yes I'm always learning new strategies and applying them to my clients
- ☐ I know there is a better way, but not sure how to implement it with my clients
- ☐ It's so hard to keep up with the pace, I feel I'm getting left behind
- ☐ None of the above

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7,000 Proven Strategies*

From the world's best business minds



Warren Buffett

Financial strategies



Peter Drucker

Management principles



Jim Collins

Business excellence



Simon Sinek

Leadership insights

Applied to YOUR client's data in **3 minutes**

*Target Date 1/15/2026

What If You Had Warren Buffett, Seth Godin, and Jim Collins on Speed Dial?

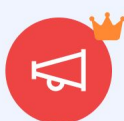
Now you can. 1,500+ legendary business minds. One AI that knows YOUR business.

3 minutes to your perfect strategy. While competitors read, you execute.

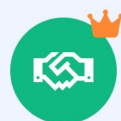
YOUR INSTANT BOARD OF ADVISORS



Finance Legends
Timeless Strategies



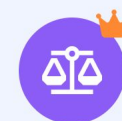
Marketing Masters
Proven Frameworks



Sales Champions
Closing Secrets



Operations Titans
Efficiency Systems



Legal Eagles
Risk Protection

Transform the world's information into your competitive advantage

Strategic Intelligence at the Speed of Thought

Start Your 7 Day Free Trial

Learn More

From infinite information to instant action - AI strategies personalized to your data, delivered in one click.

1

CLICK - Connect Your World

Connect all your business data sources (500+ integrations) with one click. Your entire business context, instantly understood.

2

APPLY - Receive Your Strategy

Get AI-powered growth strategies tailored to your exact situation. Not generic advice - personalized intelligence that knows your business.

3

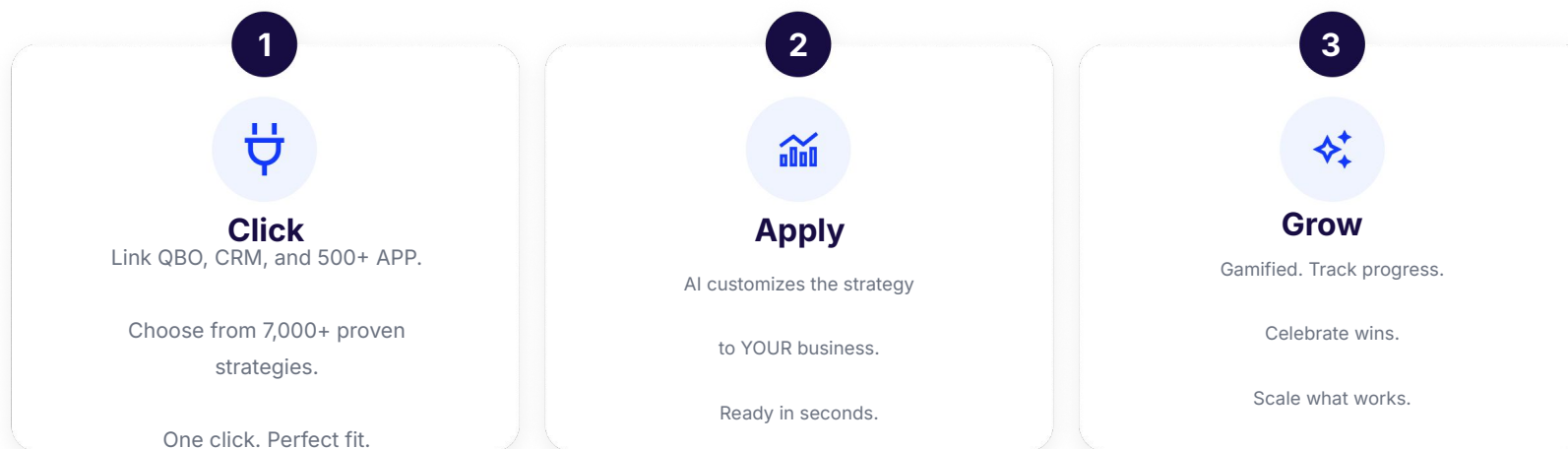
GROW - Transform Into Action

Your AI Growth Advisor turns strategies into step-by-step actions. Watch your metrics improve as intelligence becomes implementation.



Your 3-Step Transformation

Transform Information Into Income. Instantly.



Live Growth Tracking

Make more money by gamifying your business



Financial

Revenue: \$2.3m



Marketing

+156% Leads



Operation

Team ROI: 1,247%

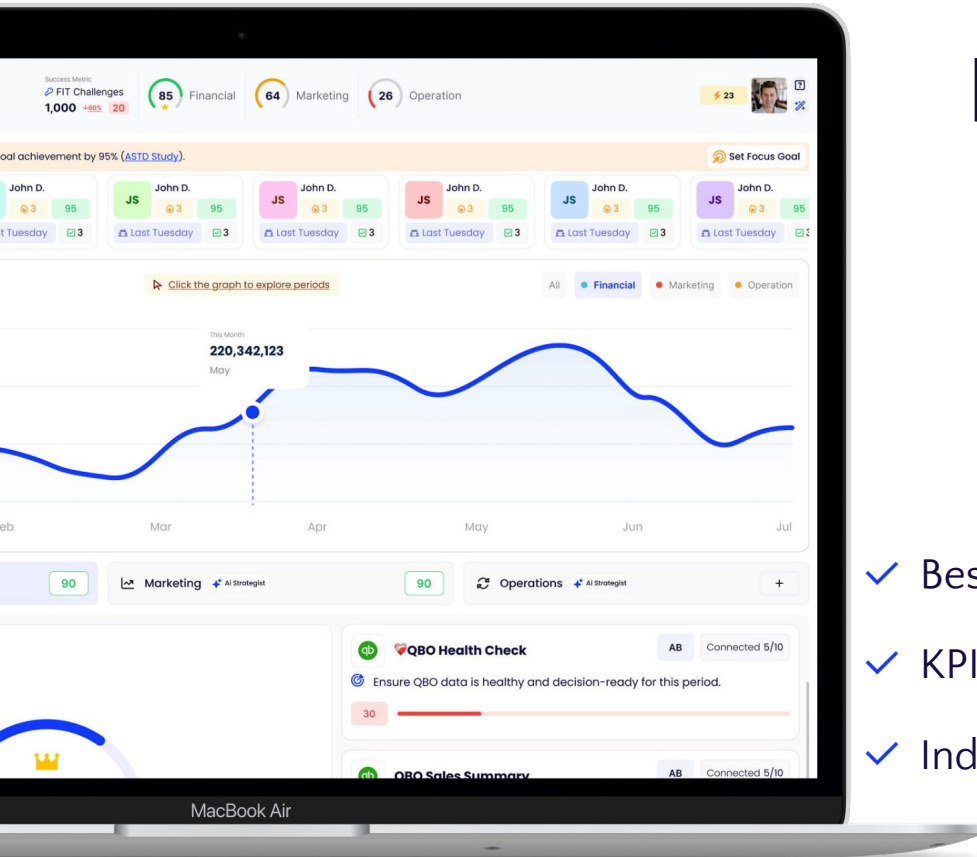
Demo 1: Complete Platform



Interactive walkthrough of the entire ecosystem

- ✓ Best-in-class reporting for multi-unit businesses
- ✓ KPI scorecards with gamified tracking
- ✓ Industry benchmarks & health checks

"You can't offer advisory without clean, consolidated data"



Demo 2: AI Advisory Magic



Real QuickBooks Data to Strategy Insights



Click



Apply



Grow

Your junior staff delivering this = **Priceless**



<https://bit.ly/1500-Free-Summaries>

QBPH Audience Free Gift



Plus 1,500+ Book Summaries 7,000 Strategies

Complete library included at no extra cost LIMITED TIME!

FREE BONUS

Others charge \$20/month for this



"Your high school kids will love this—

it's better than SparkNotes!"

They don't even need to read...AI implements for them



Good to Great

→ 34% Growth



Good to Great

→ 2X Revenue



5 AM Club

→ 3X Productivity



Atomic Habits

→ 50% Efficiency



Traction

→ Scale to \$10M



Deep Work

→ 10X Output

Why Power BI Collapses for Franchises

Power BI is like a two-story building not designed to support added stories—it collapses under the weight of multi-unit reporting. It was designed for big corporate business reporting, not a multi-unit system. If you try to make it that, you will suffer major pain and spend hundreds of thousands of dollars, and you will most likely fail.



POWER BI

**AI GROWTH
ADVISOR**

AI Growth Advisor, in contrast, is built with a solid foundation specifically for scalable, franchise-ready performance.

But Wait...There's More

A complete ecosystem for modern accounting firms



Books Health Check

Know instantly which books need
attention



Industry Benchmarks

Show clients how they compare



KPI Scorecards

Track what matters most

The Choice Is Clear

AI Will Either...



LAP You

Competitors steal your clients with AI you don't have



LAUNCH You

You dominate your market with AI amplifying your

team

Polling Question 3

Was this information useful?

Would You Like More Information about AutyMate?

Would you be interested in a paid group training series on using AI Growth Advisor?

- ☐ Yes
- ☐ No
- ☐ N/A

Spotlight Sponsor - [Learn More](#)



Your Questions



Let's Talk

What's holding you back from transforming your practice?

Thank You!



Let's Transform Your Practice Together

Connect with us:

Bryan Perdue

BPerdue@Autymate.com

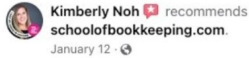


Learn More at
Autymate.com

Quick Answers at schoolofbookkeeping.com

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


[Learn More](#)

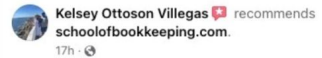


Kimberly Noh recommends schoolofbookkeeping.com. January 12 · 🌐

The School of bookkeeping is the place to go for all things bookkeeping.

Kimberly Noh - Noh Hassle Bookkeeping







Kelsey Ottoson Villegas recommends schoolofbookkeeping.com. 17h · 🌐

Dan has been absolutely amazing and so helpful! I am so grateful to have found SchoolofBookkeeping. Always prompt, correct and helpful answers! Thank you, Dan!

Kelsey Ottoson Villegas - OttoBooks LLC






Lidiya Louk recommends schoolofbookkeeping.com. 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!!

Like 2 Share



Shanon Young recommends schoolofbookkeeping.com. about 3 years ago

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

Like 2 Share

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

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Upcoming Events

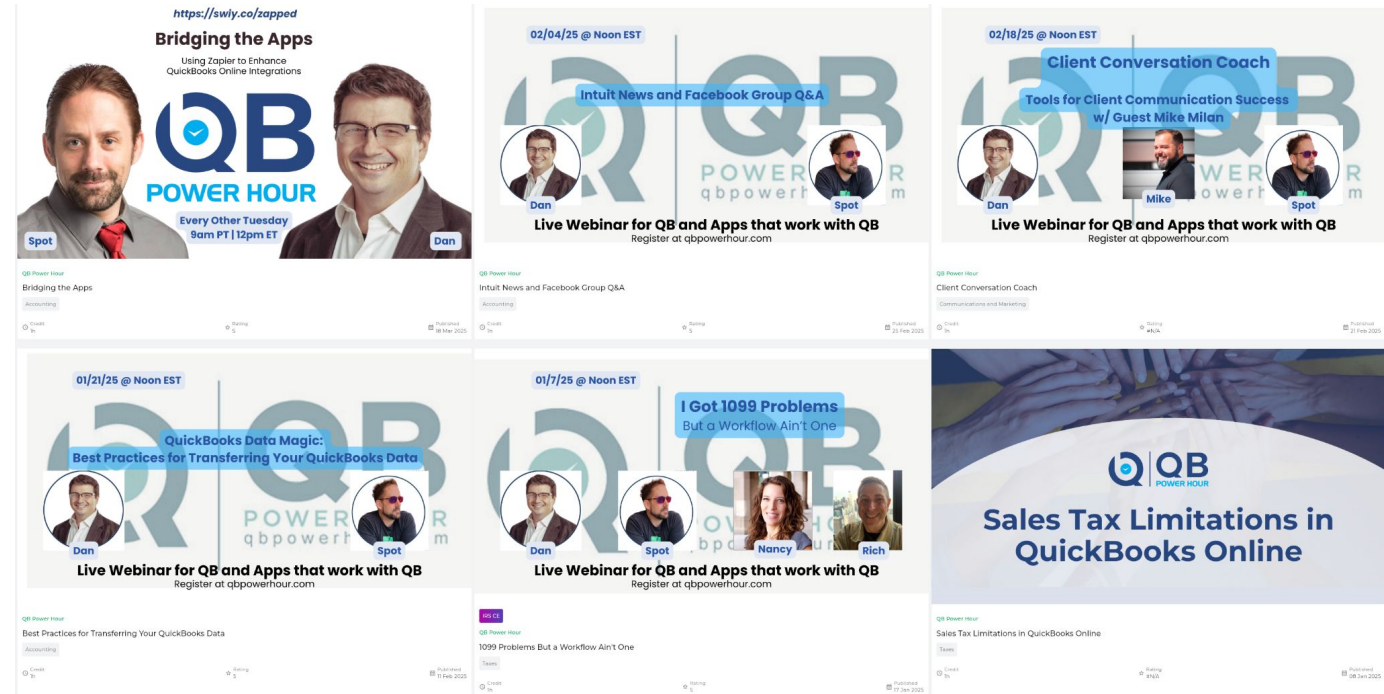
- QB Power Hour Webinar Series – every other Tuesday 12:00 pm Eastern
<http://qbpowerhour.com>
- Check the [website](#) for more upcoming events
- QuickBooks vCon and webinars:
<http://qbtrainingevents.com>



Appendix

QB Power Hour on Earmark

- QBPH is now eligible for CPE Credit through Earmark App - CPE quiz will be available ~5 business days after webinar
- [Channel on Earmark](#)





<https://bit.ly/1500-Free-Summaries>



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Atomic Habits

→ 50% Efficiency



Traction

→ Scale to \$10M



Deep Work

→ 10X Output

Housekeeping

QUESTIONS



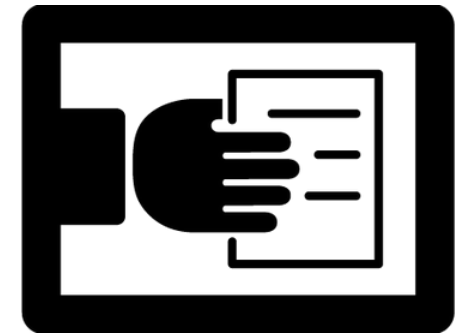
PLEASE USE THE Q&A
ICON FOR QUESTIONS
ON TODAY'S TOPIC

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>
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Long
for Success LLC

