

QuickBooks Online Training

For You
For Your Team
For Your Clients

Why recreate the wheel?



Presented By



ROYALWISE

INTRODUCTION

Even though Intuit used to claim that QuickBooks Online was so easy that anyone could do it, we all know that isn't the truth.

You can't just sit down in front of it and start using it! It takes a little bit of training...and sometimes a lot.

At **Royalwise Solutions, Inc. (royalwise.com)**, we have **ready-made video training courses** for both business owners and bookkeeping professionals, starting from the very beginning and diving into specific topics.

Our learning portal at **learn.royalwise.com** is a self-serve **QuickBooks Online training center** with video courses, webinars, books, and individual support.

We call it the **Royalwise OWLS - our On-demand Web-based Learning Solutions**. Thousands of clients have joined the OWLS for everything from a single free webinar to monthly full-access memberships.

Even better, we're more than just QuickBooks. **We train Apple and MS Office users, too!**

QuickBooks Training for You

You're a long-time QuickBooks Desktop expert, but you know you need to get onboard with QuickBooks Online. Intuit provides free ProAdvisor training, but it doesn't address real-life scenarios...or happen in real time.

According to The Garner Group, **untrained users take up to six times as long to accomplish work as trained users**. In addition, **it takes users 75% longer to self-teach** than it does to participate in formal training.

Why spin your wheels? **Alicia Katz Pollock** is a member of the Intuit Trainer/Writer Network who has a Master of Arts in Teaching. She has developed an entire **QuickBooks Online training program** with over 40 QBO courses ranging from a *Beginner's Guide* to a *QBO Bootcamp* to *deep dives* on dozens of topics.

All courses are even **evergreen** - as the software evolves, we'll update your course content!

Our course platform includes **Class Discussion forums** to ask questions, **gamification** to spark your dopamine and earn prizes, and tracks your progress for **CPE**.¹

¹ NASBA approval is pending.

QuickBooks Training for Your Team

The Great Resignation is upon us. Expert bookkeepers are retiring, being replaced with inexperienced side hustlers (everyone has to start somewhere!). Your firm may be experiencing simultaneous turnover and growth. **You don't have time to teach them how to use QuickBooks...but we do!**

Design your own Training Path for your employees or contracted bookkeepers. Sign them up for the courses you want them to take **during your onboarding process**. Add additional classes as they encounter new clients with new situations.

Our portal tracks member activity, remembering their progress and when they left off. When they have a question, each class has a **discussion forum** to get help.

All courses include **optional quizzes and surveys to earn CPE** or a participation certificate!

QuickBooks Training for Your Clients

Some firms provide full-service bookkeeping, but much of the time your clients are responsible for their day-to-day invoicing and banking feeds. **How do business owners know what to do?**

Teaching is a skill; some accounting professionals love training and are good at it, while others feel like tearing their hair out.

Training is also time-consuming. Your clients will smile and nod and tell you they understand, then **keep making the same mistakes**.

And **you also find yourself answering the same questions over and over again** across clients. Creating training materials is frequently outside the scope of your services.

That's where we come in! Design your own training path for your clients. Offer them the essentials without overwhelming them with details. Give them a place where they **can go back and re-watch their videos** when a situation arises in real life.

Build this training opportunity into your client billing for value-added services that make you stand out from the crowd.

OPTION 1: PARTNER PROGRAM

Join our Partner Program to receive an affiliate code to tack onto the end of any of the course URLs in our visitor catalog. We will provide a sitewide referral link, plus a list of custom codes for all of the courses.

Copy the hyperlinks and paste them into your email messages and webpages. Attendees create their own OWLS accounts and pay for the courses directly.

This way you can send course suggestions directly to your team members or clients, and receive a 10% referral commission for each purchase and enrollment.

We will pay out your accumulated commission through PayPal every month you reach a minimum payment threshold.

OPTION 2: CUSTOM-BRANDED PORTAL

Learn.royalwise.com utilizes a Learning Management System (LMS) just like a school does. Courses are hosted on a platform that provides both individual courses and “Flight Paths,” an organized series of classes.

With this option, **we will create a custom portal** for your organization with your **logo, branding, and company colors.**

The portal has two tracks called “Flight Paths”, one for your staff and one for your clients. Each has a selection of courses specific to their needs.

We will train one of your staff to add user accounts for your team or your clients, and how to enroll them into Flight Paths. You can set up each learner into either or both of client and staff tracks.

When a user logs in, they count as “active” for that month. If they don’t sign in, they don’t count. You are charged a flat rate based on the number of active logins from your organization that month.

This way your participation is based on activity. You can continually add new team members or clients, who will most likely binge watch in the beginning, taper off, and then only return on an as-needed basis. We also give price breaks on quantity - the more active members you have, the less the per-user monthly cost.

To see an example of a custom-branded firm portal, visit ava.matrixlms.com.

Additional Topics

The Royalwise OWLS also has libraries with **Apple and Microsoft Office training courses**. Provide a complete education to your staff and clients by including bonus content to teach people how to use their **Macs, iPhones, Apple Watches, Excel, Word, and PowerPoint**. These libraries are each available as an add-on for an additional 25% to your monthly tier.

Add Your Own Content

You are welcome to add new courses and resources to your portal. There is no additional charge for creating your own organization-specific content.

Training Portal Benefits

1. Company-Branded Portal
2. Hosting - Create your own courses and materials.
3. Full access to Royalwise content
4. Class Discussion forums to ask questions
5. Networking and Community
6. Continuing Professional Education (CPE) credit (coming soon)

CONCLUSION

Have Royalwise be your partner in providing training for your team and clients, providing value-added services to your firm.

The return on investment will be significant, saving you time and frustration. By contracting out your training instead of developing your own independent tutorials, you are freed up to serve more clients.

Your staff will learn tips and tricks to increase efficiency. Clients will make fewer mistakes for you to clean up.

It's a win-win-win opportunity!

CONTACT

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Custom Portal Pricing

Cost	Included	Per User Cost
\$1000 one-time fee	Setup & Onboarding. Create your portal, design your Flight Paths, train your company administrator	
\$500/mo	Unlimited access for up to 5 active users. Includes 30 minutes a month with Royalwise staff for training and support	\$100
\$950/mo	Unlimited access for up to 10 active users. Includes 1 hr a month with Royalwise staff for training and support	\$95
\$1800/mo	Unlimited access for up to 20 active users. Includes 1 hr a month with Royalwise staff for training and support	\$90
\$2795/mo	Unlimited access for up to 35 active users. Includes 1 hr a month with Royalwise staff for training and support	\$85
\$4,000/mo	Unlimited access for up to 50 active users. Includes 1 hr a month with Royalwise staff for training and support	\$80
\$5,625/mo	Unlimited access for up to 75 active users. Includes 2 hrs a month with Royalwise staff for training and support	\$75
\$7,000/mo	Unlimited access for up to 100 active users. Includes 2 hrs a month with Royalwise staff for training and support	\$70
TBD	101-500 active users will be billed at the 100-user tier + \$50 per additional active user	\$50
TBD	Over 500 active users will be billed at the 100-user tier + \$30 per additional active user	\$30
+20% each	Add-On: Include the Apple or Microsoft Office libraries	+20% or +40%
\$120/hr	Add-On: Additional hour of help support	(regularly \$175/hr)
\$150/hr	Add-On: Personal training for team members or clients - 1 hr of Individual 1-on-1 training with Alicia for a single user.	(regularly \$175/hr)