

# Life After Intuit Online Payroll



Managing the  
Impact on  
Your Practice

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# Agenda for Today's Webinar

- Joe's Take on Why Intuit is Discontinuing Intuit Online Payroll
- Strategies and Step by Step Processes for Moving Your Practice Past IOP
- Pricing Strategies to Maximize Revenues with Payroll Services



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# Segment 1

Joe's Take on Why Intuit is  
Discontinuing Intuit Online Payroll

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# Segment 2

Strategies and Step by Step Processes  
for Moving Your Practice Past IOP

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The graphic features the Intuit Online Payroll logo, which consists of a white box with 'intuit.' in blue, a green box with 'Online' in white, and a yellow box with 'Payroll' in green. A large, red, distressed 'CANCELLED' stamp is overlaid diagonally across the logo.



# Three Paths Forward Post IOP

**Option 1:** Do It Yourself and File It Yourself  
(No Longer an Option with QuickBooks)

**Option 2:** Find an IOP Alternative

**Option 3:** Partner with a QuickBooks  
Integrated Payroll Solutions/Provider



# Considerations when Selecting a Payroll Provider

- Integration with QuickBooks Desktop and QuickBooks Online
- Integration with QuickBooks Time (F.K.A. TSheets)
- Direct Deposit Timetables
- Co-Branded Options
- “True” Partner Program
- Practice Levels Tools (i.e., Dashboards)
- Practice Support (e.g., U.S. Based, Dedicated Support Reps/Teams, etc.)
- Protection for the Firm Regarding Payroll Compliance and Filing
- Issues Handling



# The Adoption Strategy – Step by Step

Step 1: Relax & Picture the Positive Outcomes

Step 2: Choose a Payroll Partner Using the Considerations Detailed in this Presentation

Step 3: Adjust Your Pricing (Next Segment)

Step 4: Create a Timeline that Works for Everyone

Step 5: Overcommunicate with Your Team





# The Adoption Strategy – Step by Step

Step 6: Overcommunicate with Your Clients and Proactively Manage the Adjustments to their Experience

Step 7: Proactively Update Your Files & Your Client Agreements

Step 8: Migrate your Data

Step 9: Aggressively Iron Out the Wrinkles

Step 10: Consolidate the Change through Celebration and Appreciation



# Segment 3

Pricing Strategies to Maximize Revenues with Payroll Services

**Life After Intuit Online Payroll**

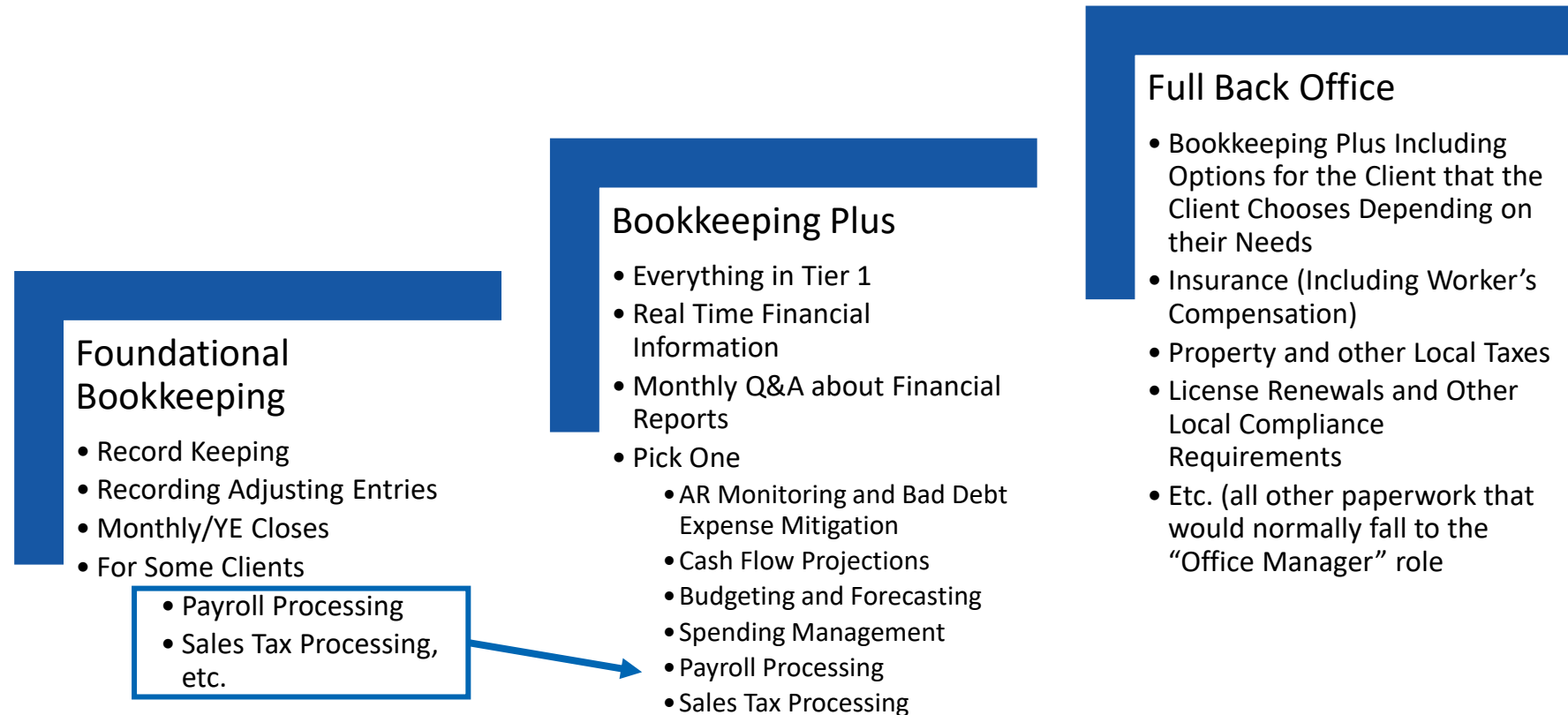


Managing the Impact on Your Practice

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The graphic features a dark blue background with a white border. At the top, the text 'Life After Intuit Online Payroll' is written in white. Below this is a stylized icon of the Intuit Online Payroll app, which is a green and yellow rectangle with the word 'intuit.' in blue and 'Online Payroll' in green. A large, red, distressed 'CANCELLED' stamp is overlaid diagonally across the app icon. To the right of the icon, the text 'Managing the Impact on Your Practice' is written in white. At the bottom right, the 'WOODARD™' logo is displayed in white.

## Folding Payroll into a Multi-Tier Slate



# Life After Intuit Online Payroll



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