

Sales Battlecard Version 2.5



CONVERSATION STARTERS

1. How many people in your firm?
2. What do you use for Practice Management?
3. Are you thinking about moving to the cloud?
4. Had any downtime recently?
5. Do you have a server?
6. How do you feel about IT?

The Modern Practice is a collection of Technology and services which helps an **accounting firm** move to the cloud. By doing this they save **money**, their systems are up more (more available) and they are able to work anywhere. Firms moving to a cloud based practice commonly achieve a ROI of 338% in the first two years (source Independent research by AltusQ).

The Modern Practice has been designed based on a **reference architecture**, a set of building blocks which define the technology used in an accounting practice. Our implementation team then apply a **prescriptive architecture**, and implement a specific set of tools, technologies and training based on the customer requirements and our capability.

The ideal customer

- Has > 10 staff members and <50
- Is an accounting firm
- Is already a Xero silver partner
- Is interested in moving to the cloud.

Signs of a tyre kicker

- Less than 5 staff
- Not yet a Xero Partner or < silver
- Is a bookkeeper
- Has aggressive questions about the cloud, such as data sovereignty

The Modern Practice

| | | | |
|-----------------------|------------------------|-------------------------|-------------------------|
| Other Services | Corporate Secretarial | SMSF | Tax |
| Ledger and Accounting | Practice Management | Document Management | Real Time Communication |
| Desktop Computing | Web Site and Marketing | Email and Collaboration | Internet, Voice and Fax |

As a part of implementing the entire solution, we replace a customers' existing IT function. Whilst it may be handy to have on-site support during migration or to support PCs and Printers, we need to consider the impact our project will have on existing IT staff or providers. Whilst we should happily work with them, the customer needs to be aware that our solution **replaces** them. This is the case for customers on **Gold Support** or who on a lesser support program wish to manage some of their IT themselves.

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SALES PROCESS

Collect:

Company Name, Address and State
Contact Name, Phone Number and Email
Number of Users and Xero Partner Status

Create Lead

Create and Send Quotation

Discuss and Refine Quotation

Mark Lead as Won and Create Job

Follow up during and after the engagement

HANDLING OBJECTIONS

- **I don't want the disruption to my practice** – This implementation has almost no impact to your practice. In fact we do all the work in the background and you choose the go-live date!
- **Will my data be safe in the cloud?** – The cloud is trusted by people such as the Commonwealth Bank of Australia. In fact we've worked really hard to bring you only certified cloud services which do protect your data. That's why we don't recommend some popular providers.
- **Do I need to do all of it?** – We believe organisations get the most benefit when all of their systems are in the cloud. We recommend you plan to do all of it, even if you only implement a component.
- **I want my IT provider to do some of it.** – We have spent over three years and millions of dollars researching just how to correctly implement this solution for accounting firms. We find when 3rd parties attempt the implementation, they are learning, make many mistakes and cost you money.
- **Can I talk to someone who has done this before** – Sure, revert back and find a reference account.

| | |
|--|---|
| Internet Voice and Fax | |
| Telephones available everywhere, not just in office | ✓ |
| Call Queues in the cloud, not reliant on number of lines | ✓ |
| Email and Collaboration | |
| 50Gb Active Mailbox Size | ✓ |
| Unlimited Archive | ✓ |
| Access Anywhere | ✓ |
| 5 licenses of Microsoft Office per user | ✓ |
| Office for iOS (Apple iPhone or iPad) | ✓ |
| Office for Android | ✓ |
| Web Site and Marketing | |
| Simple, easy to edit website | ✓ |
| No website bandwidth charges | ✓ |
| Contact us forms and more | ✓ |
| Secure Client Portal | ✓ |
| Integration with Practice Management | ✓ |
| Desktop Computing | |
| Software Distribution | ✓ |
| Inventory | ✓ |
| Telemetry | ✓ |
| Patch Management | ✓ |
| Remote Tools | ✓ |
| Anti-Virus/Anti-Malware | ✓ |
| Hard Disk Encryption | ✓ |
| Branch Cache | ✓ |
| Real time Communication | |
| Presence – See who's online or offline | ✓ |
| Secure messaging | ✓ |
| Storage of messages | ✓ |
| Web Conferences | ✓ |
| Video Conferences | ✓ |
| Application Collaboration | ✓ |
| 1:1 or 1:many online conferences | ✓ |
| Document Management | |
| MS Office Integrated Storage and Retrieval of Documents | ✓ |
| Full Search and find across all document types | ✓ |
| Storage and Retrieval of Email | ✓ |
| Automatic filing of scanned documents | ✓ |
| Integration with Practice Management | ✓ |
| Automatic Document Creation | ✓ |
| Document Management App Store | ✓ |
| Access Anywhere | ✓ |
| Practice Management | |
| Centralised portal of all tools with access control | ✓ |
| Web Based Job, Task, Staff and Client Management | ✓ |
| Integrated Document Management | ✓ |
| Salesforce Automation and CRM Functionality | ✓ |
| Time and Cost Billing or Fixed Price Billing | ✓ |
| Tax Lodgement Facilities | ✓ |
| Ledger and Accounting | |
| Storage and Import of Client Ledgers from other accounting software | ✓ |
| Single Online Ledger | ✓ |
| Custom Reports | ✓ |
| Custom Workpapers and Workpapers Management | ✓ |
| Best of Breed Reporting and Coding | ✓ |
| Bank Feed Integration | ✓ |
| Online Client Portal | ✓ |
| Tax | |
| Hosting of Existing Tax Package in the cloud | ✓ |
| Pay for what you use, not what you might need | ✓ |
| Only enable when you need data | ✓ |
| Available anywhere | ✓ |
| SMSF | |
| Either hosting of existing super package in the cloud or access to Software as a Service Cloud Package | ✓ |
| Access Anywhere | ✓ |
| Always Available | ✓ |
| Corporate Secretarial | |
| Either hosting of existing corporate Secretarial package in the cloud or access to Software as a Service Cloud Package | ✓ |
| Access Anywhere | ✓ |
| Always Available | ✓ |
| Other | |
| Host any server based application in the cloud for a fraction of the current cost. | ✓ |



Microsoft Office 365 provides for a core set of features for email, collaboration, document management and real time collaboration.



Mailchimp provides advanced email and newsletter capabilities



OneSaas provides integration between practice management and mailchimp.



Microsoft® Windows Intune provides desktop management capabilities.



Mynetfone provide internet, voice and fax capabilities for our customers



The HubOne Modern Practice Portal provides integration and tools to round out the document management and portal requirements of the solution.



Xero provide a number of solutions used in the Modern Practice, including Xero itself, Practice Studio, Workpapers, ledgers and Xero report packs.



We use Amazon web services where appropriate to host legacy server based applications.



We also use Microsoft Windows Azure to host legacy applications.

For More Information:

sales@hubone.com

www.hubone.com

1300 650 684 in Australia