

BOYER & ASSOCIATES,
GOLD-CERTIFIED
MICROSOFT PARTNER



QUESTIONS TO ASK

AN ACCOUNTING SOFTWARE PROVIDER

SO YOU'RE THINKING OF BUYING NEW ACCOUNTING SOFTWARE ...

Perhaps you've already done some online research. Maybe you've even heard of Microsoft's "365" offerings and like what you see but don't know which one's the best fit.

Or maybe you're just getting started in the accounting software selection process and you don't know where to begin.

Either way, your next best step is to talk to a vendor (referred to as a partner) who sells and implements these software systems. Before you settle on the first one, keep in mind that partners vary greatly in the level of experience and support they offer to clients both during and after an implementation.

To help you through the software selection process, we've compiled 8 top questions to ask a partner to help you determine whether they are the right fit.

1. CERTIFIED

WHAT CERTIFICATIONS DOES THE PARTNER HOLD FROM MICROSOFT?

Anyone can set up a business and decide to sell something. Just because a partner sells accounting software does not mean they're good at it. One quick and easy way to sift out the stellar partners from the so-so ones is to check the vendor's certifications.

Microsoft assigns gold or silver competence status to partners who have done a good job in the past of successfully implementing its products.

Of all partners, only 5 percent reach the status of "gold certified" in any one category. This means that partner has created an excellent reputation for itself in the eyes of Microsoft.

While this is certainly not the only sign of a competent partner, it is a great one.

2. TRAINING

WHAT TRAINING DOES THE PARTNER OFFER TO GET YOUR TEAM SET UP ON YOUR NEW ACCOUNTING SYSTEM?

Soon you will have a brand new accounting system installed. Then what?

Before you settle on a partner to help implement your new accounting software, here are a few questions to ask about the training they offer after implementation:

- Will the partner train you and your team on how to use the new system?
 - Can you choose to train only subject matter experts who will then train the rest of the team?
 - Is that part of the installation cost or is it extra?
 - How many hours of training are included?
 - Is there a limit to how many of your staff members the partner is willing to train?
 - Is training a one-time deal or can you ask follow-up questions in the weeks following implementation?
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3. SUPPORT

WHAT SUPPORT DOES THE PARTNER OFFER AFTER IMPLEMENTATION?

Just because you purchase a Microsoft product does not mean that you are automatically entitled to endless hours of free support from Microsoft headquarters.

Similarly, don't expect that your partner will offer unlimited support. Each partner you consider will have specific rules of when support is offered and how much it costs. Many will have tiered levels of support depending on how much you want to pay and some partners might offer no follow-up support at all past the initial implementation. Ask what the options are rather than assuming you need to go with what is first proposed.

Make sure you understand exactly how much support is offered, for how long and for how much before deciding on a partner to support your software.

4. FUTURE

WHAT HAPPENS IF I NEED TO UPGRADE AGAIN OR ADD USERS?

Purchasing and implementing accounting software can be compared to a marriage. This is a long-term investment, so be sure you are considering the future needs of your company as well as the present needs.

For example, you will want to make sure that your organization is going to be well supported throughout the life of the product. You will need to know that this new system can grow with your company, that it can handle whatever changes might be on the horizon and that any future upgrades or additional software you might need can be integrated seamlessly years from now.

You will also need to make sure that the partner you choose is willing and able to help you with these future changes.

5. BETTER

SIMPLY PUT, WILL THIS PRODUCT MAKE MY TEAM WORK BETTER?

The last thing you want to do is put in a sizable investment of time and money for minimal efficiencies or cost savings.

Before you settle on a particular product or a certain partner, you need to be sure that the choice you're making will have a significant positive impact on your company's bottom line.

Will this product through this partner actually benefit your company?

Asking this question seems basic enough, but it's easy to get caught up in the momentum of a smooth-talking salesperson with flashy technology and fancy software. Seeing strong integration, workflow and reporting capabilities will help you know the true value of the product.

6. EXPERIENCE

HAS THE PARTNER IMPLEMENTED PROJECTS SIMILAR TO YOURS?

Implementing an accounting product is a complex endeavor. You need the right team with the right experience to complete this important task with minimal snags.

Beware of a partner that promises to help you implement any system on the market or one that advertises a global client base. They might be stretching themselves thin and compromising quality.

Years in business is also a good sign of a company that does (or doesn't) have the skills to handle your project.

7. REFERENCES

HOW HAPPY ARE THE PARTNER'S PAST OR CURRENT CLIENTS?

You would never hire a new employee without first checking their references. Why would you approve a considerable investment for a new accounting system without doing the same?

A trustworthy, experienced partner will have satisfied clients. Look for a partner with several testimonials - both on their website and on external sites such as BBB or Google. Check out their case studies and retention rate as well.

This gives you the chance to sniff out phonies and credible partners the chance to prove they are the real deal.

8. PAYMENT

HOW DOES THE PAY SCHEDULE WORK?

Each partner has its own way of billing out the cost of a project. Make sure you have the details on how exactly this works before you sign on the dotted line. Here are some questions to consider asking:

- What exactly is included in the total price? Does your estimate include training? Ongoing support? How many hours of consulting?
 - What if we need extra customizations?
 - What if new problems arise after the implementation?
 - Can I meet the primary person I will be working with as either my project manager or lead consultant?
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WHY BOYER

HOW BOYER & ASSOCIATES ANSWERS THESE CRITICAL 8 QUESTIONS

- 1. CERTIFIED:** Boyer is a gold-certified Microsoft partner.
 - 2. TRAINING:** We offer ongoing training and free events to all of our clients.
 - 3. SUPPORT:** Maintenance plan options help ensure that your company receives ongoing support.
 - 4. FUTURE:** Microsoft products are not going anywhere and neither are we. We started in 1994 and your future is great with us as a partner.
 - 5. BETTER:** Microsoft offers the best accounting products on the market for small to mid-size businesses. We offer 3 of them and can match you with the best fit.
 - 6. EXPERIENCE:** We've been in business for 25 years and successfully implemented hundreds of projects.
 - 7. REFERENCES:** We have a 97 percent renewal rate with our clients.
 - 8. PAYMENT:** Call us today at 763-412-4315 to set up a free consultation.
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