



Beyond QuickBooks: Scaling Smarter with Cloud ERP

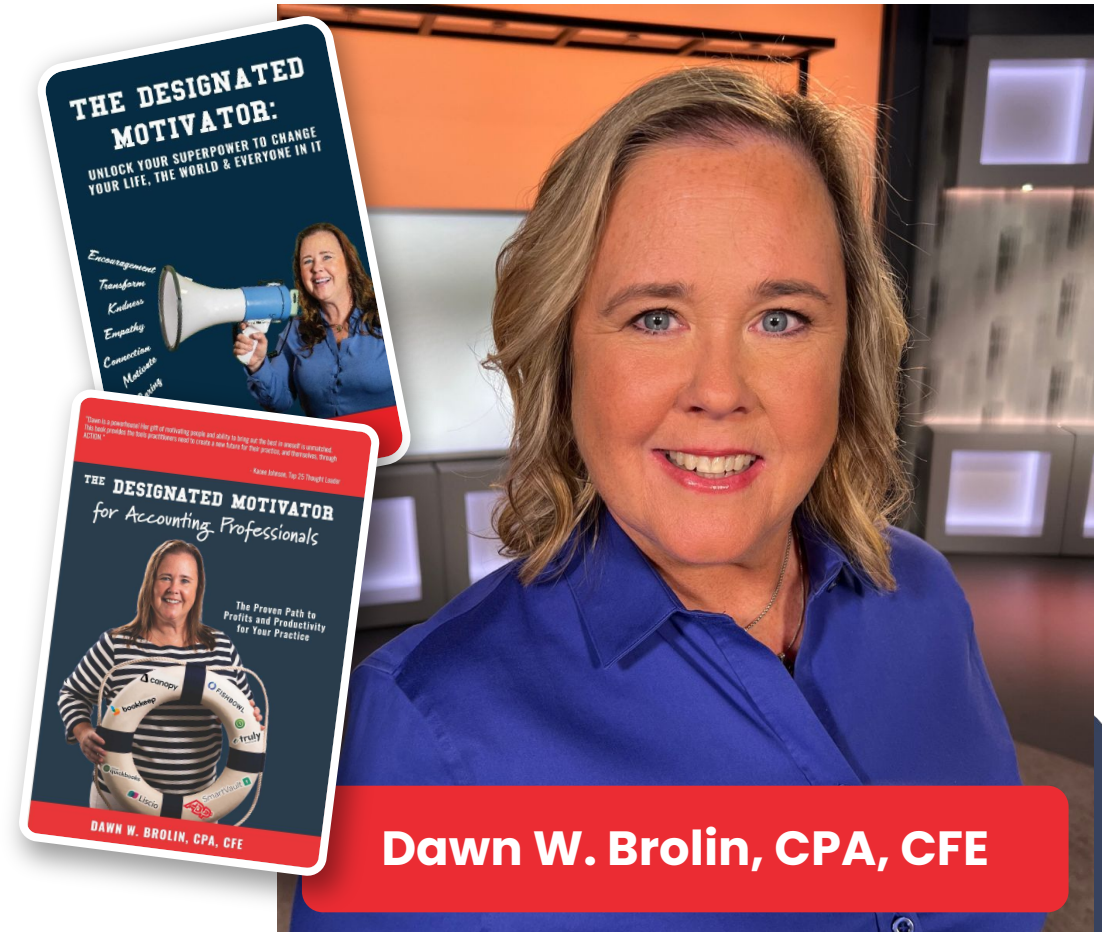
A candid conversation about what's next after QuickBooks

Dawn Brolin, CPA, CFE | Jaclyn Ng (Acumatica) | Lori Murawski, DiamondBack Truck Covers

The Designated Motivator for Accounting Professionals



- Founder of Team Brolin and author of The Designated Motivator and The Designated Motivator for Accounting Professionals
- CEO of Connecticut-based CPA firm, Powerful Accounting Inc.
- President of [Accounting Cornerstone Foundation](#)
- Member of the ADP Advisory Board, and Avalara QuickBooks Advisory Board.
- 2024 Top Presenter by CPAacademy.org.
- Multiple years in Accounting Today's Top 100 Most Influential People.
- Helps firm owners work smarter, achieving the freedom to work only six hours a day while growing their business.



Dawn W. Brolin, CPA, CFE

#TheDesignatedMotivator

Join DawnBrolin.com

Our Guests



Jaclyn Ng

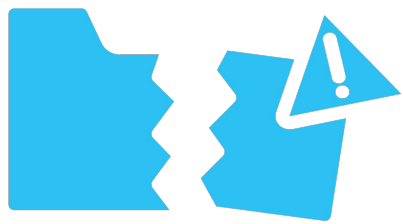
Senior Product Marketing Manager
Acumatica



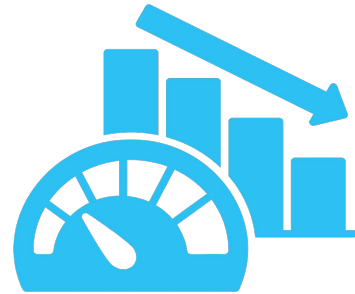
Lori Murawski

Director of Accounting at DiamondBack Truck Covers

Why So Many Are Leaving QuickBooks?



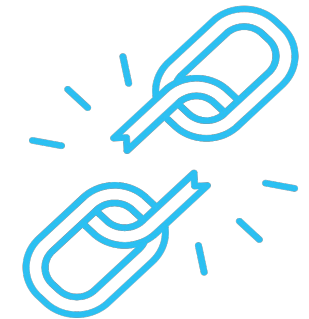
Data Corruption



Performance
Slowdowns



Lack of
intercompany
support



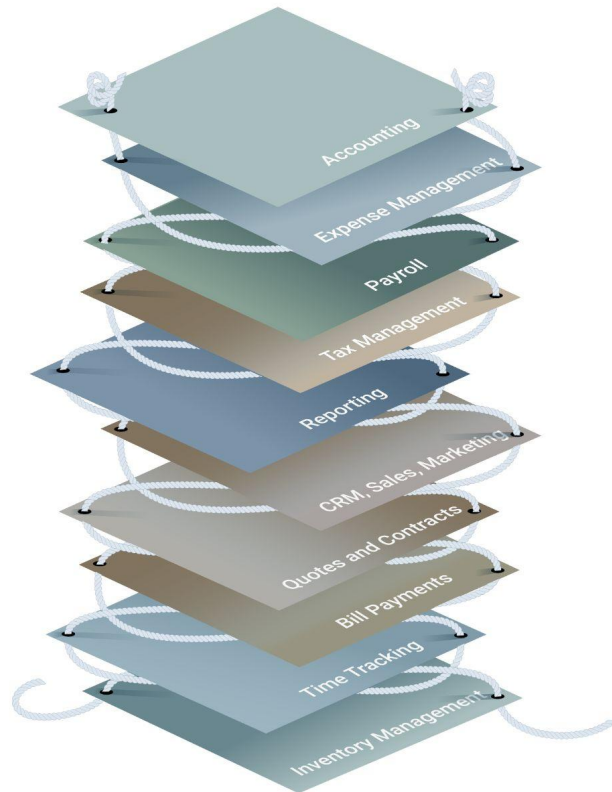
App overload /
disconnected
systems

Managing Multiple Systems Alongside QuickBooks

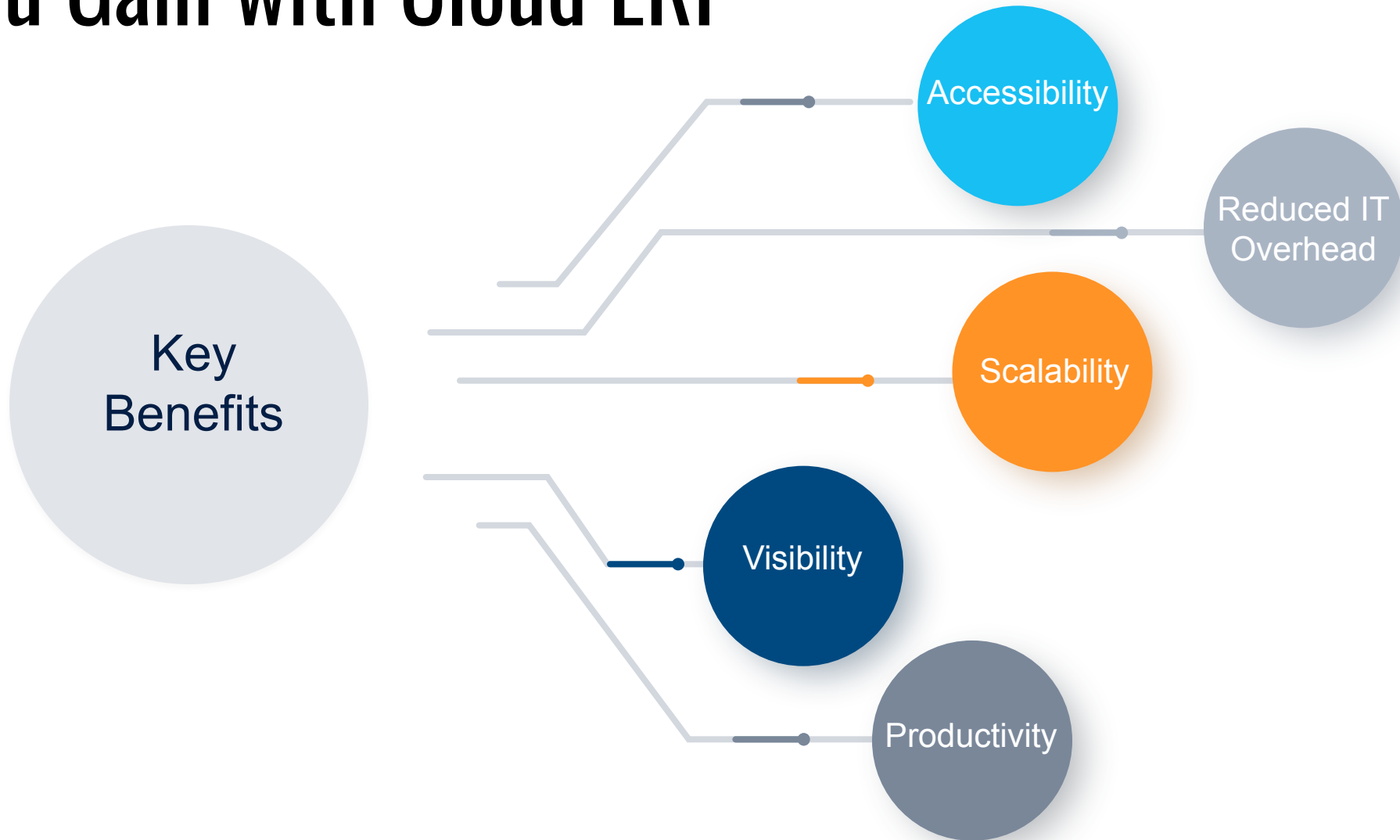
QuickBooks
+ Other Solutions

vs

 **Acumatica**
The Cloud ERP



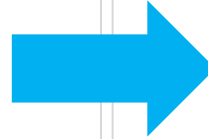
What You Gain with Cloud ERP



What Makes Acumatica a Solid Next Step?

Experience the difference

QuickBooks Acumatica



Experience the difference

QuickBooks Acumatica

- Manual Processes
- User-based Pricing
- Data Silos
- GAAP/IFRS Compliance Issues
- Multi-entity Limits
- Access Limitations



- Automated Processes
- Unlimited-user Access
- Single Source of Truth
- GAAP/IFRS Compliant
- Multi-entity Financials
- Mobile Device Access



Lori's Story: From QuickBooks to Acumatica

Transition to Acumatica: Key Takeaways

Biggest Fears:

- Adapting processes mid-year
- Moving customers, vendors, and reporting
- Unsure how financial reporting would evolve
- Concern about add-ons (Avalara, Shopify, Workato)

Team Adaptation:

- Tough first month close
- Fully adapted by month 5
- Automation reduced manual work and saved time

Top Benefits Today:

- No more import errors or production downtime
- Web-based = off the server, no more crashes
- Integrated production + accounting = faster close, tighter controls



DIAMONDBACK

Transitioning Without Losing Your Mind

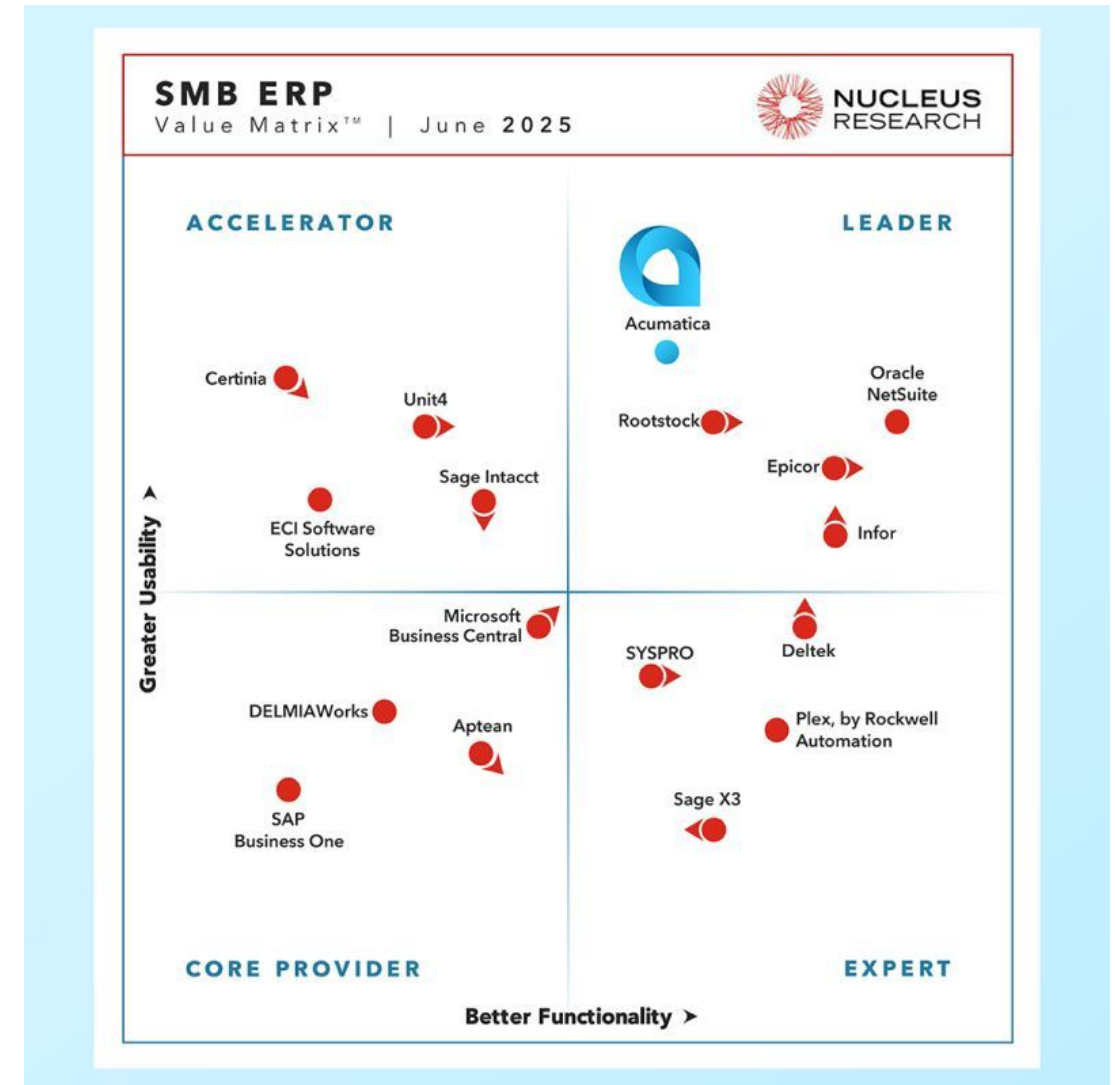
- ✓ Phased approach
- ✓ Data migration tool
- ✓ Keep your favorite apps via integrations
- ✓ FastTrack (Core business deployment in 90 days or less)

Customization, Reporting & Compliance

- ✓ Out-of-the-box reports
- ✓ No-code custom reports (report wizards)
- ✓ Audit readiness and compliance

Nucleus Research 2025 SMB ERP Value Matrix

Top leader for the third year in a row in the ERP market based on usability and functionality



G2 Quarterly Reports: Summer 2025

SUMMER 2025	SUMMER 2025	SUMMER 2025	SUMMER 2025	SUMMER 2025
Grid Leader	Grid Leader ENTERPRISE	Grid Leader MID-MARKET	Grid Leader SMALL BUSINESS	Momentum Leader

SUMMER 2025	SUMMER 2025	SUMMER 2025	SUMMER 2025	SUMMER 2025
Best Usability	Best Usability MID-MARKET	Best Usability SMALL BUSINESS	Easiest To Use MID-MARKET	Best Meets Requirements SMALL BUSINESS

SUMMER 2025	SUMMER 2025	SUMMER 2025	SUMMER 2025
High Performer ENTERPRISE	Easiest To Do Business With SMALL BUSINESS	Best Relationship	Best Relationship SMALL BUSINESS

SUMMER 2025	SUMMER 2025	SUMMER 2025	SUMMER 2025
Users Most Likely To Recommend	Users Most Likely To Recommend SMALL BUSINESS	Best Results MID-MARKET	Best Results SMALL BUSINESS

SUMMER 2025 EMEA	SUMMER 2025 CANADA	SUMMER 2025	SUMMER 2025 CANADA	SUMMER 2025 LATIN AMERICA
Regional Leader	Regional Leader	Highest User Adoption SMALL BUSINESS	High Performer MID-MARKET	High Performer

Acumatica Cloud ERP

Acumatica Cloud ERP Software

Easy-to-use customizable Cloud ERP software that truly fits your needs to improve profitability, efficiency, and more. Secure powerful flexibility for today and tomorrow.

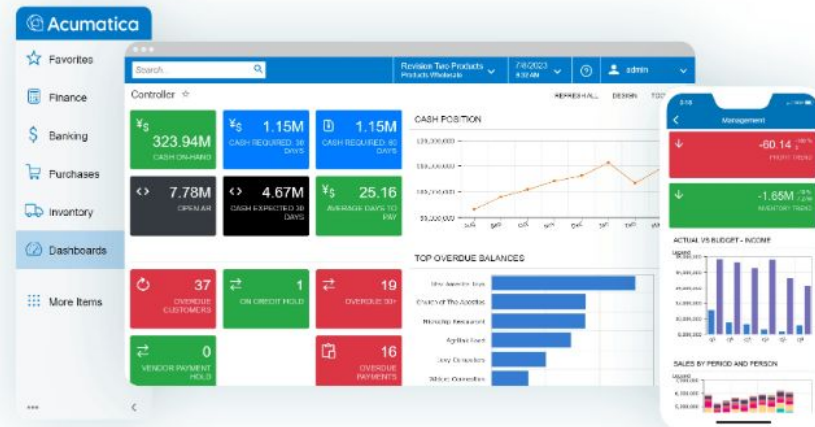


Put your whole business at your fingertips.

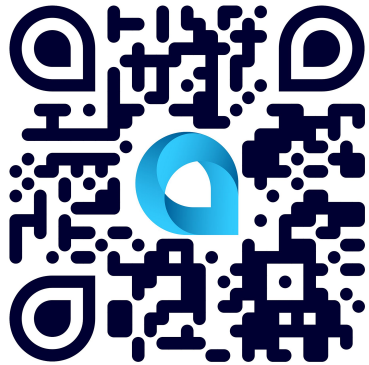
With real-time access to financials, reporting, CRM, and more, our integrated business management solution was specifically designed to help small and mid-market businesses thrive in the new digital economy.

[Explore General Business](#)

[Watch Video](#)



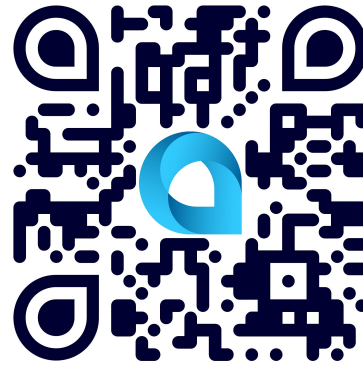
Pricing



Unlimited Users

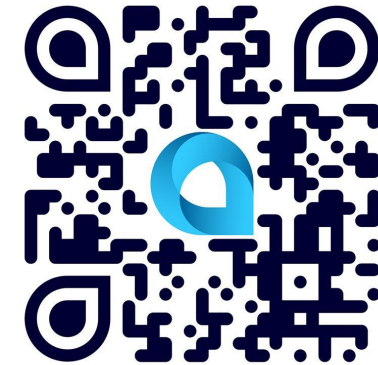
Pricing is based on three simple factors:

1. Applications
2. Projected Resource Consumption
3. License



ROI Calculator

Independent and unbiased calculations based on ROI-driven technology insights and case-based investigative studies by Nucleus Research, a leading industry analyst.



APEX for Construction

Reduce your costs with bundled software, implementation, and support.

Starting price at just **under \$1,500!**

Key Takeaways

- You're not crazy for wanting more than QuickBooks can offer.
- ERP doesn't have to be scary—or expensive.
- Acumatica is the modern solution for growing firms ready for real control and visibility.

Your Next Steps

- Download the ERP ROI Calculator
- Explore integrations via the Acumatica Marketplace
- Connect with Acumatica's team for a personalized walkthrough
- Recording + resources will be emailed post-webinar

VIP Code

Request a Demo with this link and get 15% off Acumatica's Software for your firm, and your clients!



Questions?



Thank you!

WORK WITH DAWN BROLIN

To Transform your Firm and Increase your Revenue



APPLY NOW

- (1) 1 hour discovery call
- On-demand access via WhatsApp
- Discounts on the software tools
- Homework after each session
- 1-hour group session per month
- 1-hour 1:1 session per month
- AI Companion and Zoom recording of all calls for action items and summaries
- Additional Meetings to support your goals

	\$299/month <small>*12 month commitment</small>	\$1150/month <small>*12 month commitment</small>	\$3,500 /month <small>*12 month commitment</small>
	GROUP COACHING	GROUP + 1:1 COACHING	ALL IN WITH DAWN
(1) 1 hour discovery call	✓	✓	✓
On-demand access via WhatsApp	✓	✓	✓
Discounts on the software tools	✓	✓	✓
Homework after each session	✓	✓	✓
1-hour group session per month	✓	✓	✓
1-hour 1:1 session per month		✓	✓
AI Companion and Zoom recording of all calls for action items and summaries			✓
Additional Meetings to support your goals			✓