

Three Questions with Steve Boyle Director-Invoiceto Cash, Intuit

Intuit Inc. is a leading provider of business and financial management solutions for small and mid-sized businesses, financial institutions, consumers and accounting professionals. Its flagship products and services, including QuickBooks®, Quicken® and TurboTax®, simplify small business management and payroll processing, personal finance, and tax preparation and filing. The company, which had annual revenue of \$3.5 billion in fiscal year 2010, is in the midst of massive CRM/BRM system deployment. Steven Boyle, director of Intuit's Invoice to Cash unit, talks with us about the initiative and how it will enhance customer service and relationships.

What systems are being deployed and why?

The order-to-cash unit for Intuit is charged with supporting the multitude of business models hosted by the company, including enterprise, direct-to-consumer (D2C) and retail. We are currently implementing a front-end Siebel customer relationship management (CRM) system and a back-end Oracle billing and revenue management (BRM) system. No one in the world has done this before.

In the D2C space, the business world is in the midst of a significant movement away from desktop software to software-as-service or connected services models. So the idea of providing TurboTax on disc and loading it on a PC is going away in favor of hosting it online and storing historical information on secure servers. That is what we are trying to do with this initiative; getting consumers to move to online solutions.

For example, many small businesses with \$10-15 million and more in revenues—very significant small businesses—are running on QuickBooks. There is a lot of risk having that on the desktop, whereas hosted QuickBooks provides a number of significant benefits including version protection in the form of automated updates and security. We are offering fully integrated business solutions that go from paying employees all the way through to hosting a website. It's really a vertical small business world that we are supporting, and my order-to-cash systems have to be ready to support that relationship.

Another example is the relationship we have with our Quicken customers. Previously, it was a once-a-year relationship at upgrade time. But now, we've got a monthly subscription service option and, in the case of our Financial Institution products, a usage-based service where they pay per seat or pay per "drink." This introduces a much different relationship that is daily, 24/7. It is always on.

That's where business models are going. It's much more cost effective because there aren't hard shipping costs or disc preparation. It's more efficient to deliver bug fixes because we can just update the hosted platform. It's a classic win-win for customers and Intuit, even if the actual revenue number doesn't change.

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However, the system requirements are much different from what our current platforms are capable of supporting. Systems that support tracking usage for accurate billing are highly critical. We also want to provide a self-service platform that gives customers the opportunity to fix payment failures rather than just cutting off services. That way, on the back end, we don't need a large team of credit and collections people following up on those failures.

That is what this big system movement is all about. It is very customer-focused. We're not going in this direction because we think we can get more money out of the customer by making them pay per month. We are doing it because we can do more for them in a hosted world versus a desktop world.

How did you approach project design and implementation?

It was a bit of balancing act in terms of determining what requirements were most critical to the business. It went through our prioritization process, wherein a team of process architects collect input from business and functional units like mine and use that to build out the requirements against delivery windows.

Too, while we do have a bias toward out-of-the-box functionality, because customization can lead to complications down the road when it's time to update, in some cases that couldn't be delivered. So we also had to plan for some software customization in the deployment timeline.

The decision was also made not to go with a "big bang" deployment. Instead, phase one of the new platform was launched in our healthcare business, which is small but has very big expectations. We are learning a lot from that initial launch about functionality and bugs we need to fix before we launch on the full small business ecosystem we support. That is bigger than any other in the world. To have exposed the whole ecosystem to this new platform would have been very risky.

Two other smaller business units will roll out in May, with more lined up beyond then. Each of those roll-outs will include new functionality that is currently being built. For example, the ability to monitor payment failures in a more efficient manner will probably be rolled out in phase three.

Did this initiative require any specialized skills that Intuit did not already have in-house?

Yes. We needed higher-level players on the business analytics side who also had an aptitude on the systems we are implementing, as well as core reconciliation accounting skills and the ability to liaise with our customers. Finding those professionals was one of the reasons we came to Kforce. We have been very impressed so far. After spending just one hour with our Kforce account team, they delivered four very qualified resumes within two days. They came in for that hour, listened intently and delivered upon our needs.