



Understanding the Intuit Community: Market Research

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Panel:

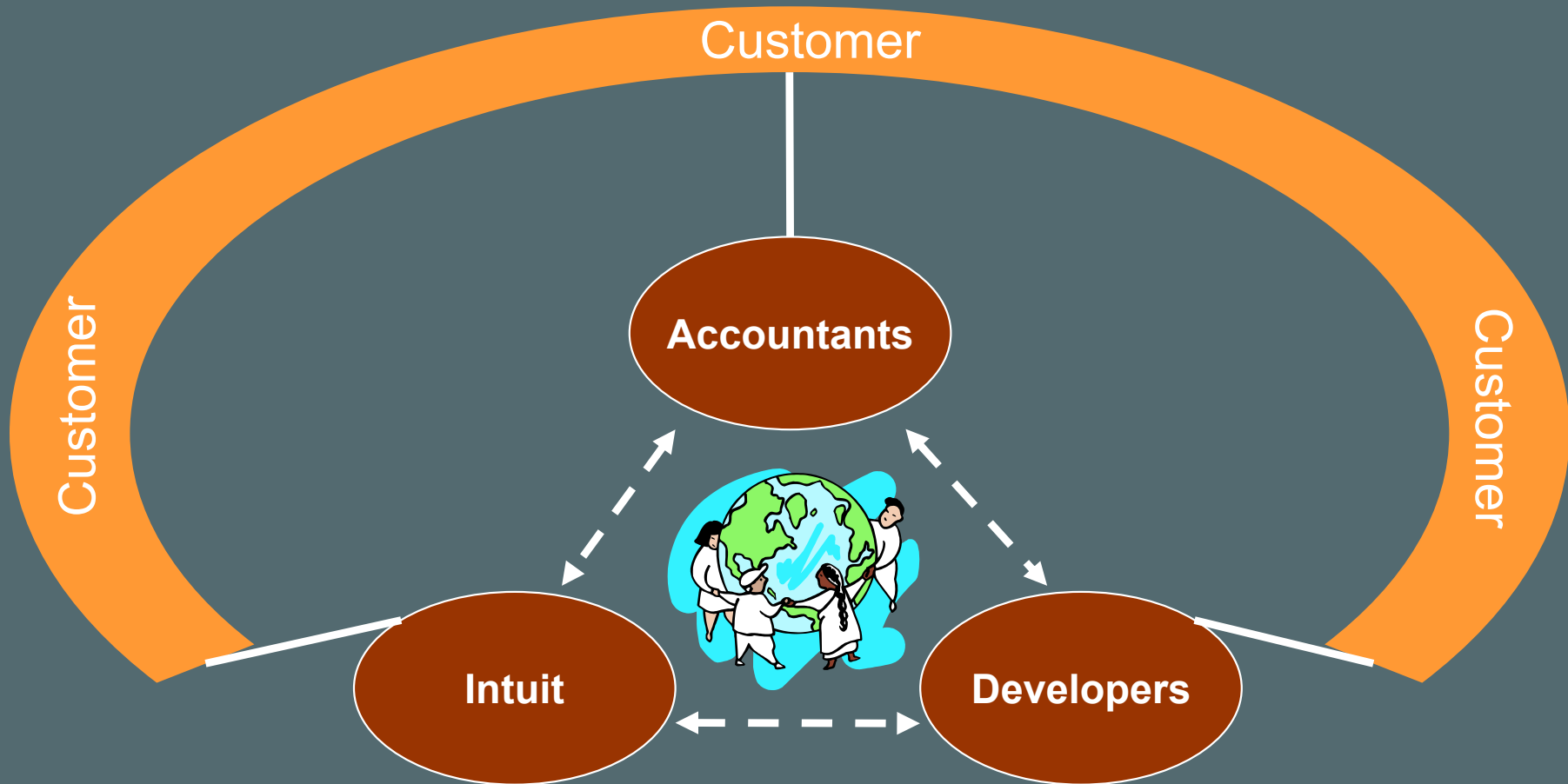
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Group Product Manager, QuickBooks
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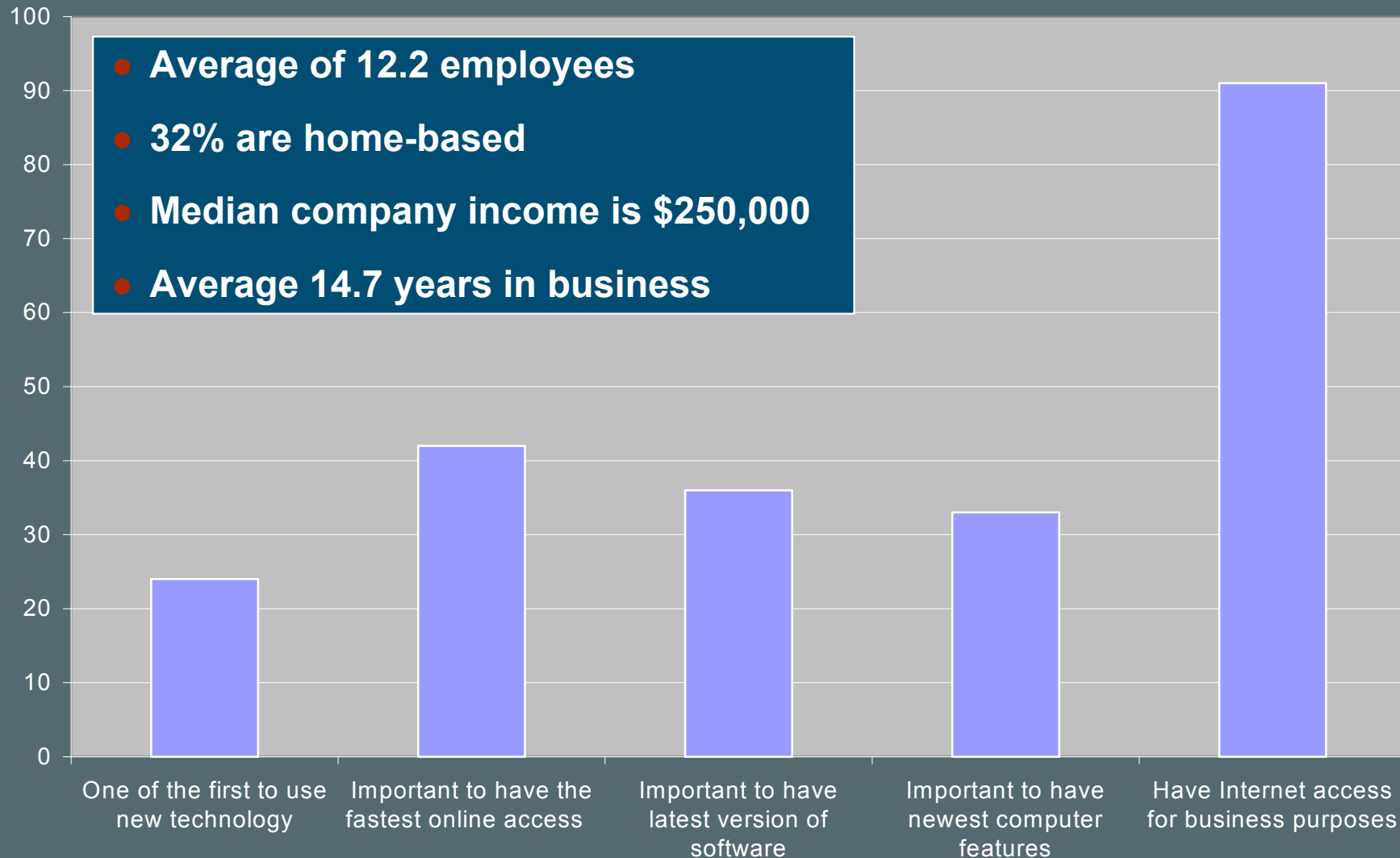
Intuit Community



Groups with common interests collaborate to grow their business and better serve small business customers

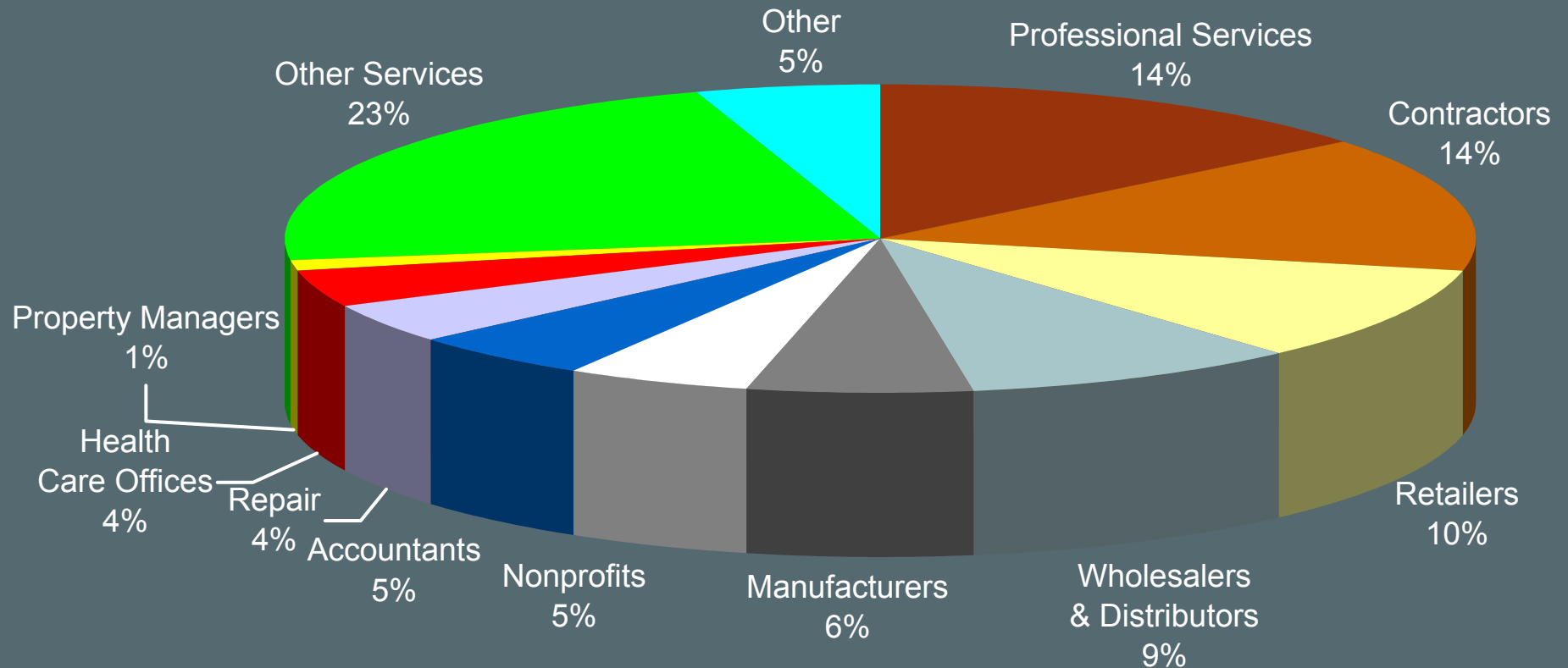
QuickBooks Customer Overview

2.6 Million Active QuickBooks Customers



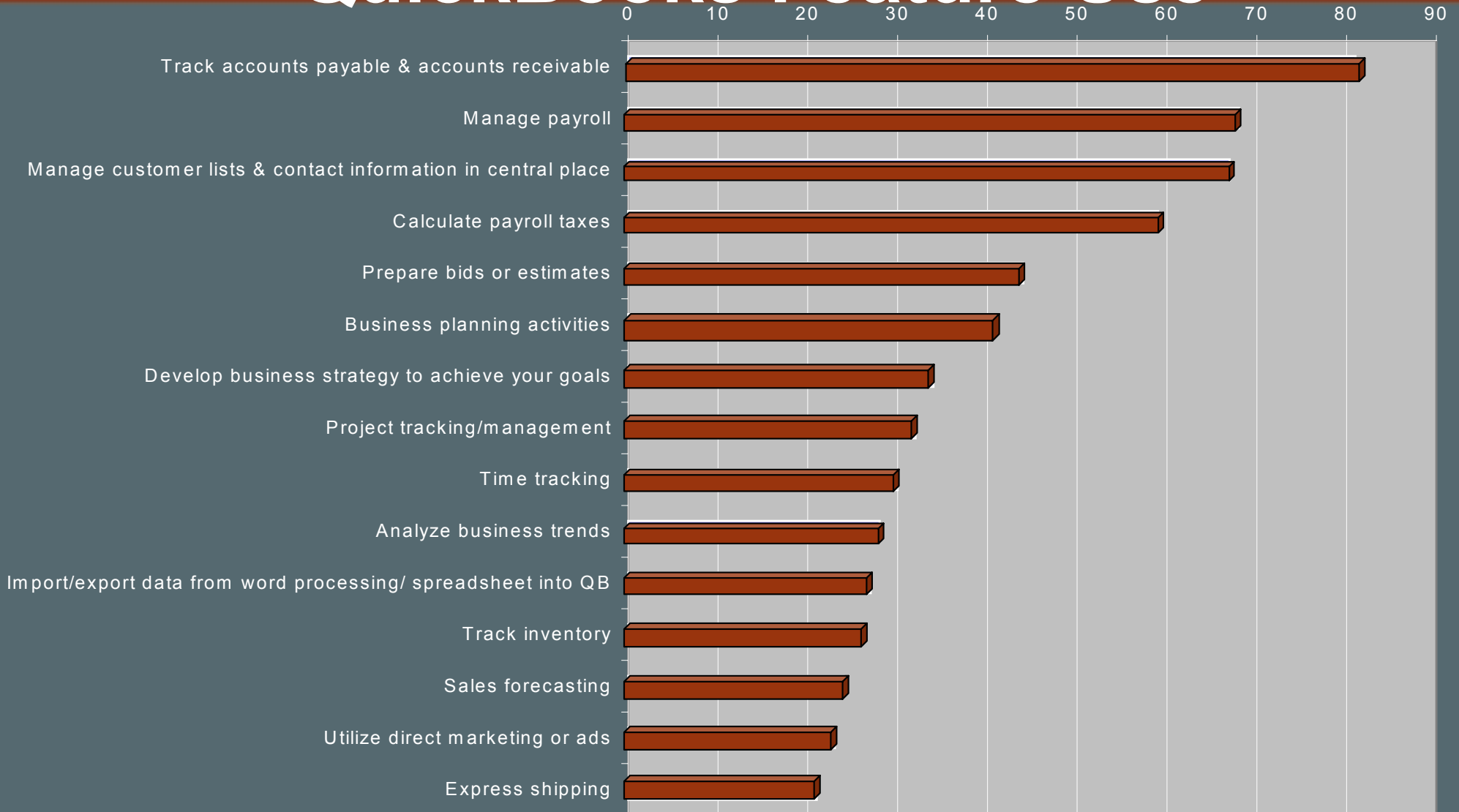
Source: QuickBooks 2003 User Study

QuickBooks Users by Industry



Source: QuickBooks 2003 User Study

QuickBooks Feature Use



Source: QuickBooks 2003 User Study

User Attitudes: Benefits of Integration

Primary benefit of using applications designed to integrate and share data with QuickBooks

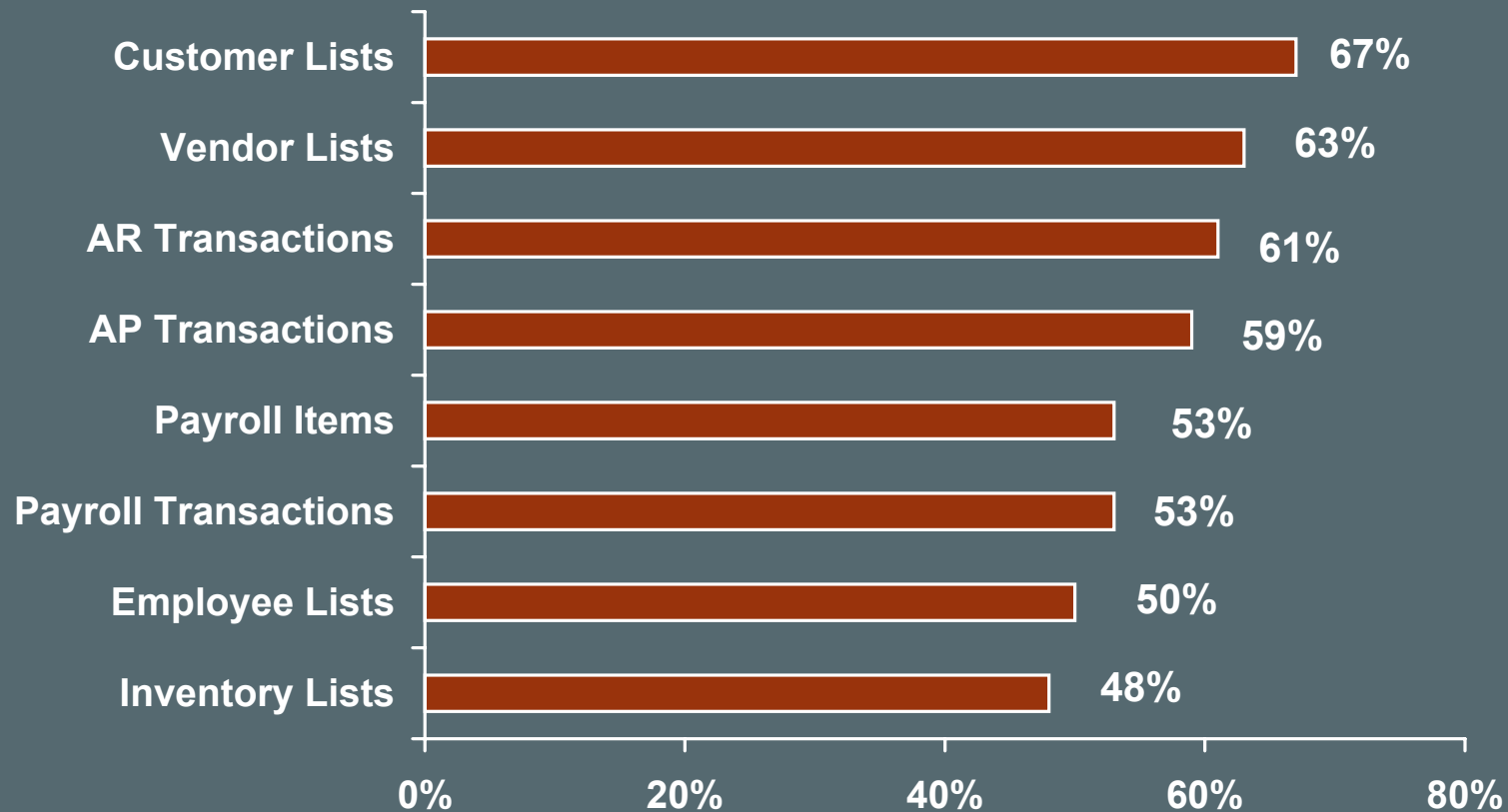
Reduces double entry of data	23%
Saves time	18
Provides information the way I want to see it	16
Helps me be more productive	14
Customizes solution to meet my unique bus. needs	13
Reduces data entry errors	6
Increases accuracy	4
Other	6

Base= Respondents currently using integrated application N=251

Reduced data entry + time savings the biggest perceived advantages

User Integration Preferences

How interested would you be in integrating the following types of information?

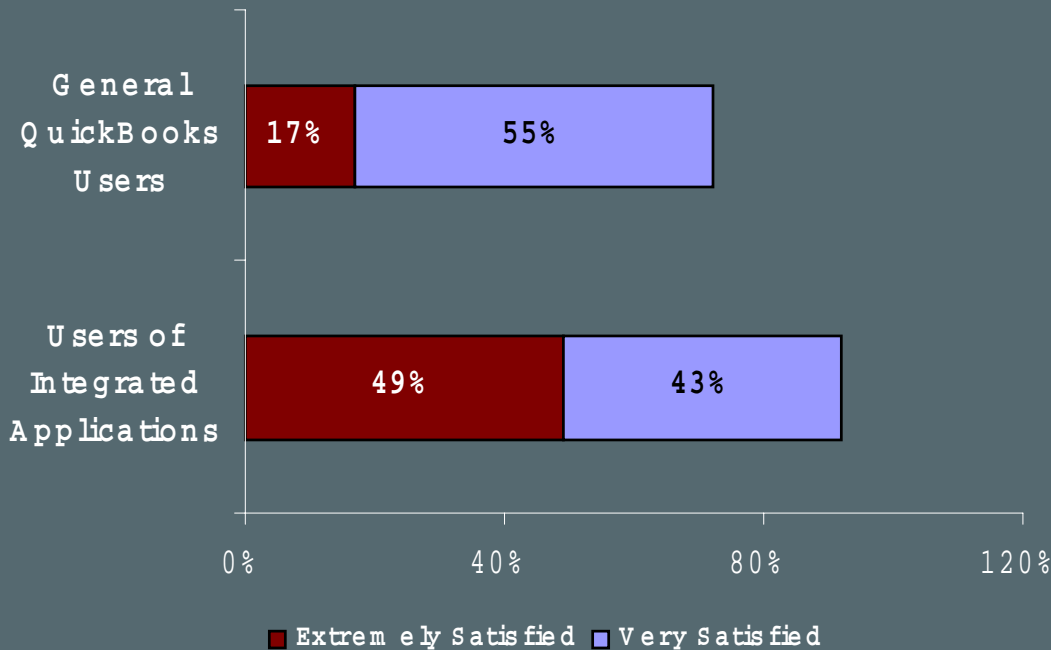


% of respondents answering "somewhat" or "very interested"

Source: 2003 IDN Awareness Study, 6/03

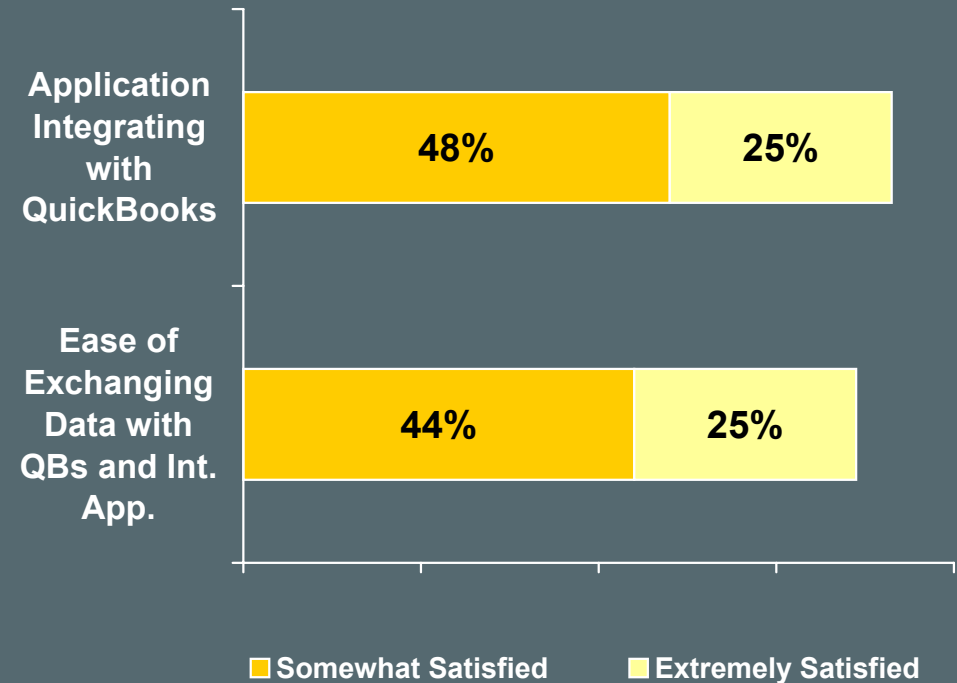
Satisfaction with Integration

Satisfaction with QuickBooks



QuickBooks with integrated solution = higher satisfaction

Q21: How satisfied are you with the following?



Base: Currently using Integrating software N=164

Integrated Software User Profile

- **Product Use**
 - More likely to be using Premier or Enterprise
- **Size & Growth**
 - Higher number of employees and more employees using QBs
 - Higher revenue and expect to grow considerably (47% vs. 28%)
- **Complexity & Access**
 - More complex finances and write more checks
 - Higher proportion using high speed internet access (75% vs. 55%)
- **Industry distribution generally matches distribution of QB users:**
 - higher proportion in retail, computer/software, wholesale, and legal industries
 - Lower proportion of medical and construction businesses

Sources of Awareness and Purchase Influence

% of purchasers indicating awareness or purchase decision based on identified source:

	New Users %	Upgraders %
Referral	80	35
Accountant, Bookkeeper or Other Consultant	52	22
Friend, Relative or Business Associate	48	16
From Intuit	14	63
Mailing from Intuit	8	51
QuickBooks/Intuit Website	8	8
Email from Intuit	2	23
Phone Call from Intuit	1	2
Print Advertisement	5	6
TV Advertisement	6	2
Retail Store	16	15
Article/Review in Magazine or Newspaper	3	2
Some Other Way	10	7

Referral, particularly via accountants, is an essential driver of awareness and purchase



Developer Profile: What should you know?

Overview of IDN Program

Objective

- To enable third-party developers to create and sell solutions that better meet customers' needs...*RFMB*

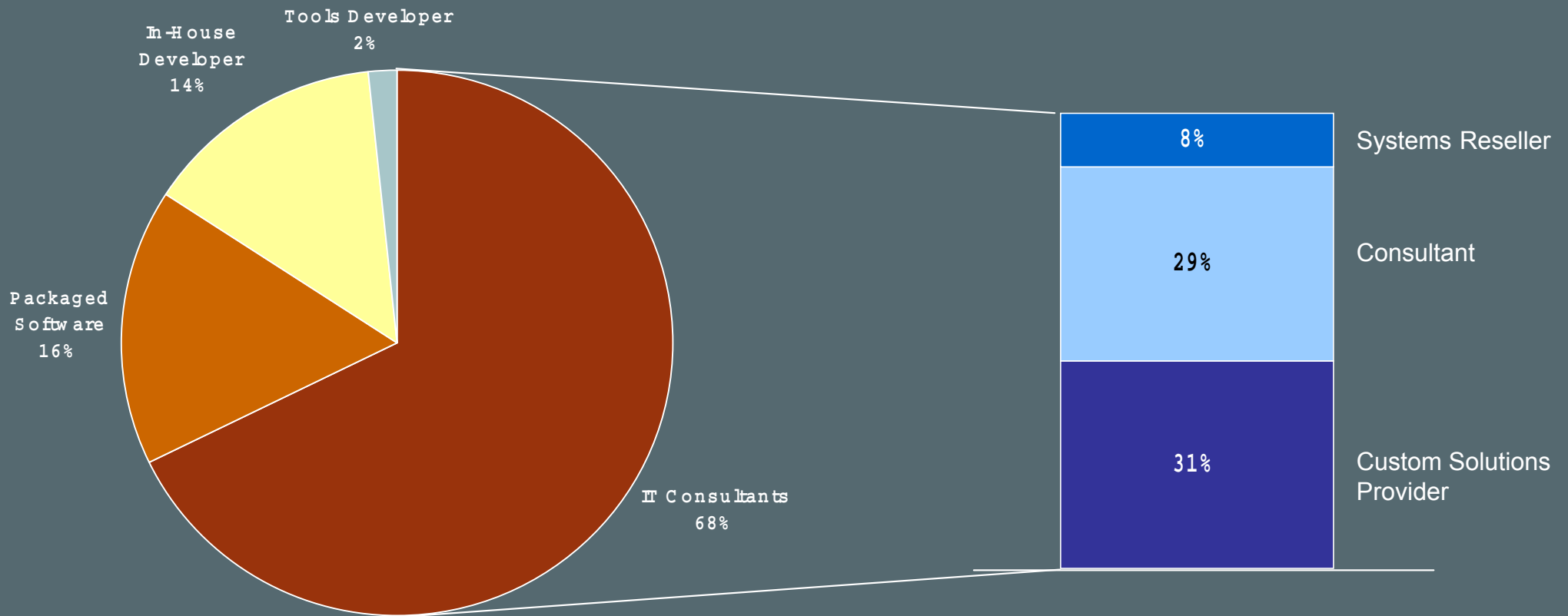
Program components

- Software development kit
- Technical documentation & support
- Channel marketing programs

Current Status

- SDK 3.0
- QuickBooks Pro (US & Canada), Premier (US & Canada; also incl. industry solutions), Enterprise (incl. Industry solutions), Online Edition,
- 2001 to current versions

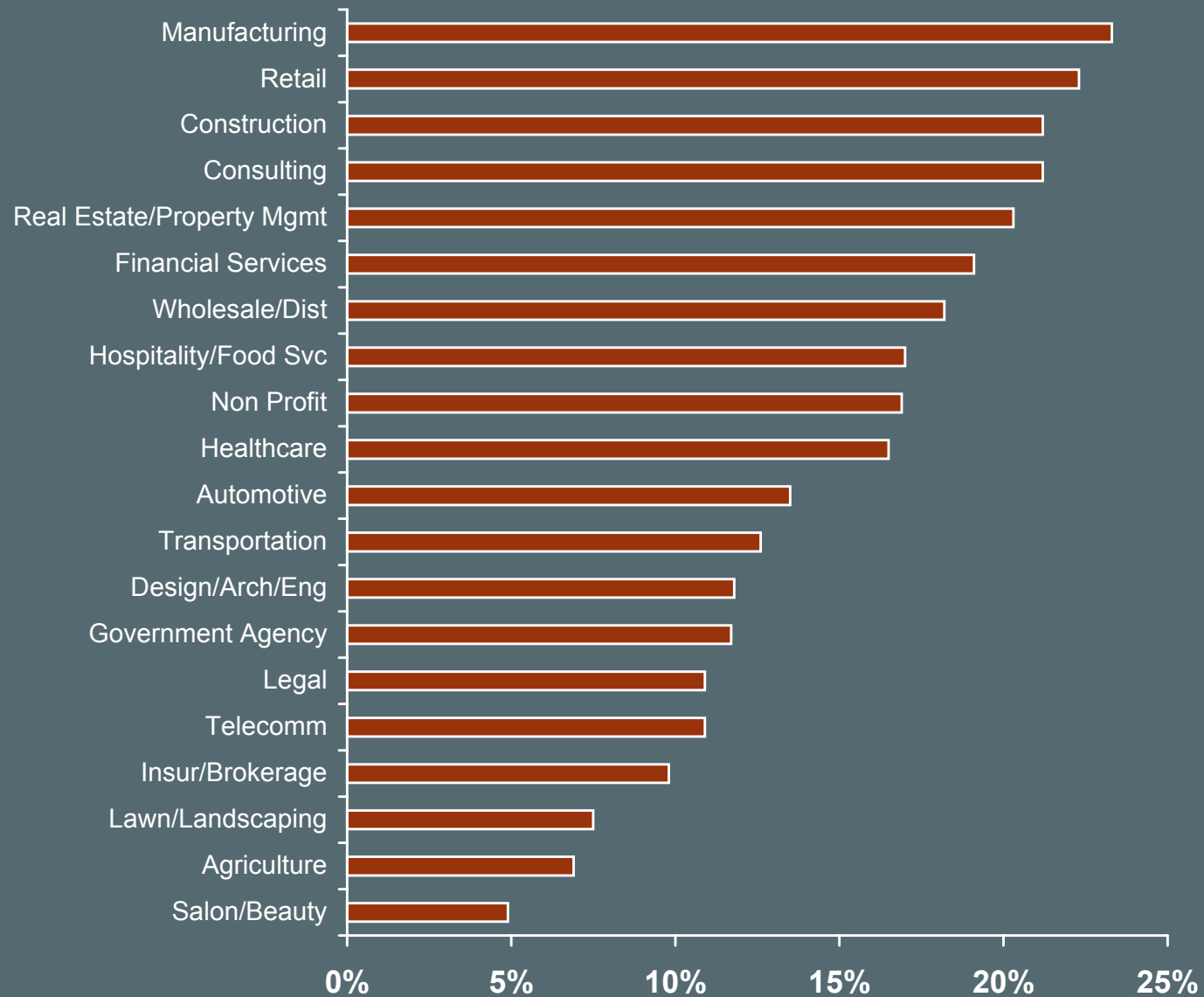
Developer Mix



Total ~60,000

Source: May 2003 IDNC registration data

Developers by Industry



Source: May 2003 IDNC registration data, team analysis

Developer Profile

Packaged Developer

Avg. Revenue = \$1.23 MM

Avg. #Employees = 23

Avg. #Customers = 649

Avg. length of time in business = 6.4 years

Avg. Marketing Spend = \$20k

IT Consultant

Avg. Revenue = \$760k

**Avg. #Employees = 12
(median = 3)**

Avg. #Customers = 248

Avg. length of time in business = 6.0 years

Avg. Marketing Spend = \$8k

Tools Provider

Avg. Revenue = \$1.48 MM

Avg. #Employees = 25

Avg. #Customers = 614

Avg. length of time in business = 6.3 years

Avg. Marketing Spend = \$15k



QuickBooks®
PROADVISOR PROGRAM

CERTIFIED
QuickBooks®
ProAdvisor

ProAdvisor Profile: What Developers Should Know

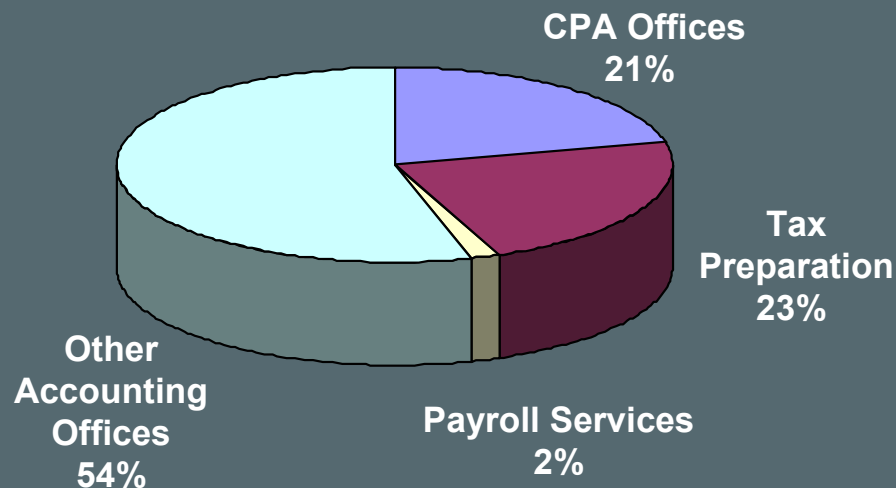
Defining an Accountant

“A financial professional in public practice who provides accounting, tax preparation and/or bookkeeping services to multiple clients”

How Many Accountant Offices?

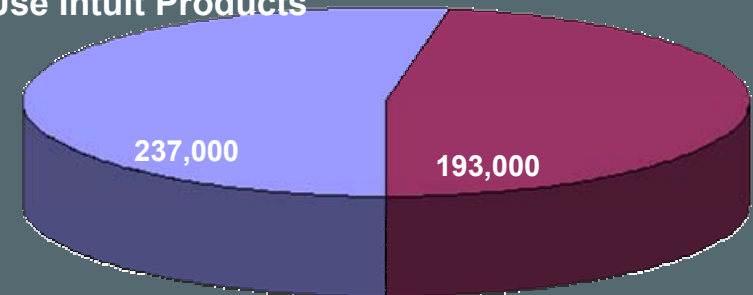
430,000

Total US Accounting Locations



How Many Does Intuit Serve Today?

Accountants Who Use Intuit Products



Source: US Census County Business Patterns 2001
US Census Non-Employer Statistics 2001
Intuit Customer Segmentation Study, 2003

2003
IDN

Overview of Accountant Programs

- **Intuit Accountant Dream**

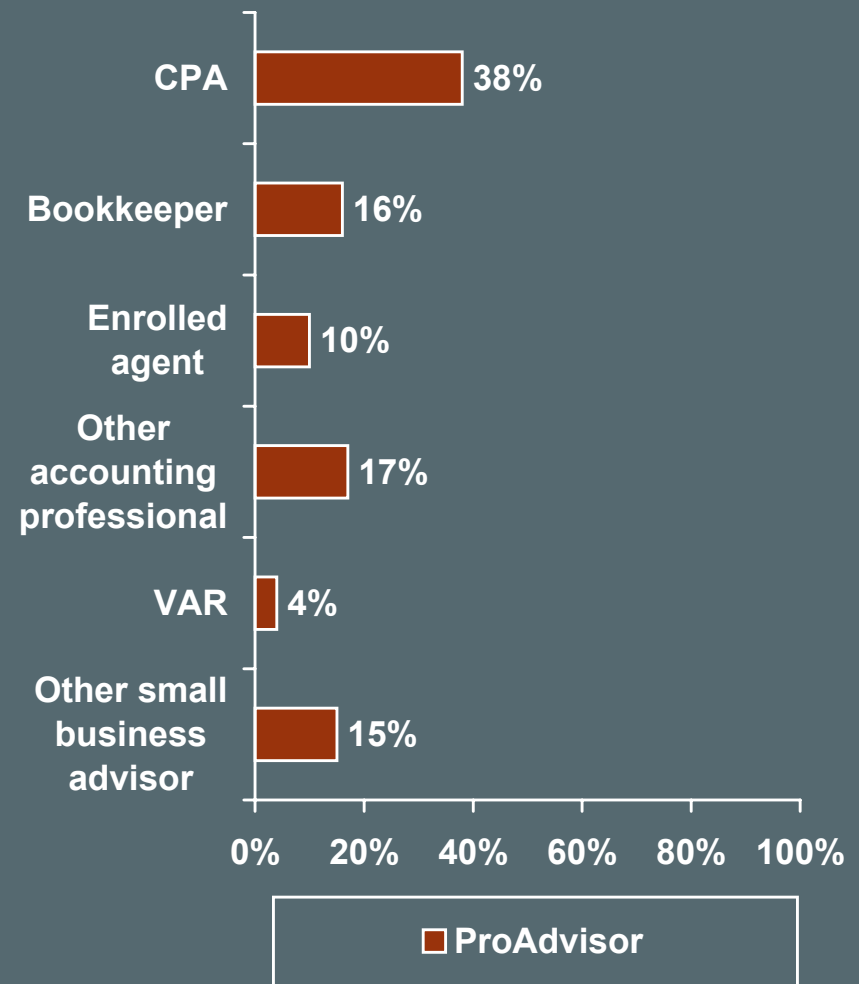
- Accountants view Intuit as their most valued business partner
 - Seek Intuit solutions to run their business and serve their clients
 - Actively recommend Intuit products to their clients and other accountants

- **Advisor Programs**

- Intuit ProConnection (48,000 members)
 - Product information, "how-to" tips, peer-to-peer best practices
 - Marketing and practice-building strategies
- QuickBooks ProAdvisor Program (19,000 members)
 - Software, support, training -- tools and resources to better serve QuickBooks clients.
 - Certified QuickBooks ProAdvisor Referral Database

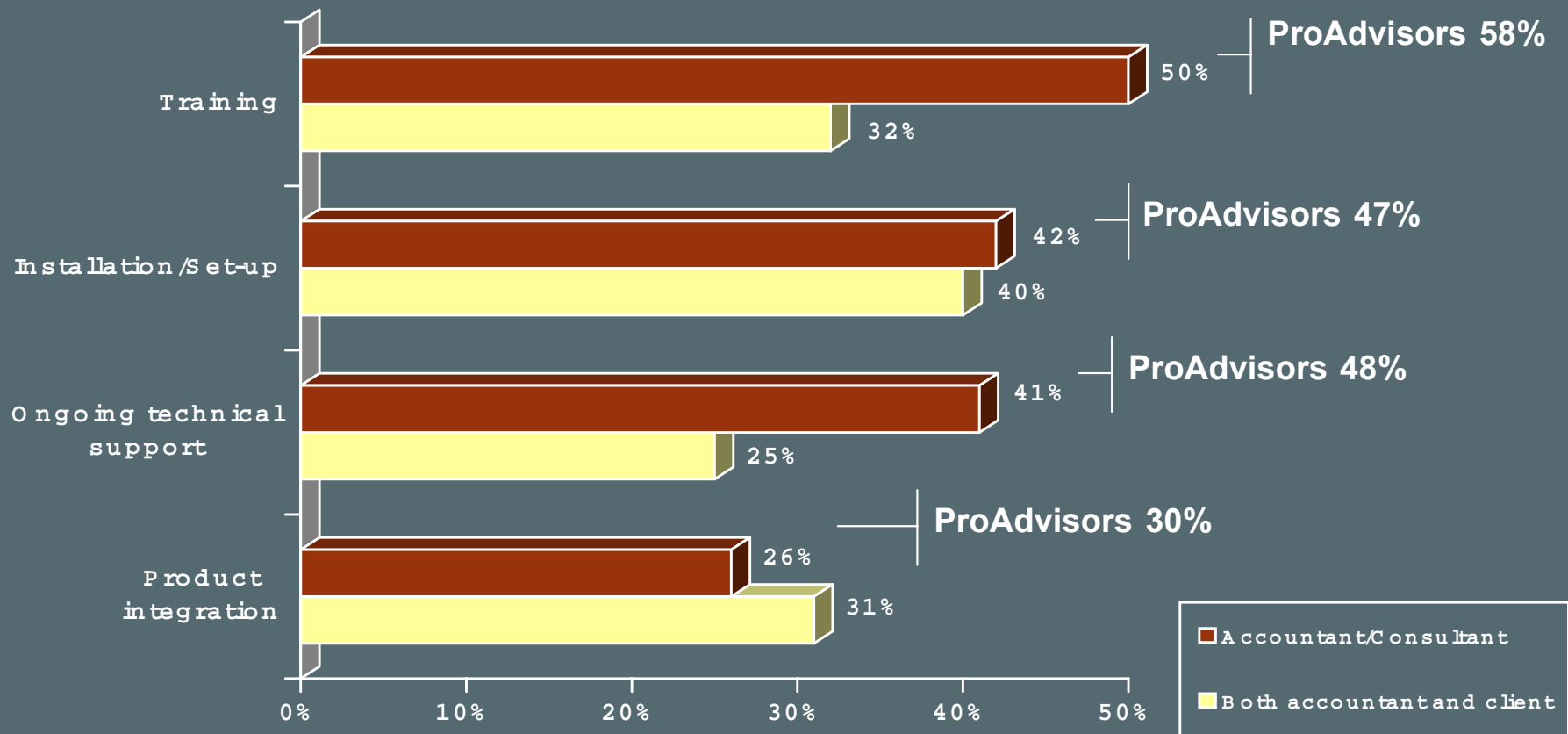
Who Are QuickBooks ProAdvisors?

- CPAs (Certified Public Accountants), Enrolled Agents, Accountants, Bookkeepers, Computer Consultants, Trainers, VARS...and even some IDN developers



Role in Implementing Software

Over 45% of ProAdvisors provide computer technology consulting services
Vs. 24% of Non-ProAdvisors offer this service



Educating ProAdvisors about Your Solution

- **What's unique about the product**
 - Product Feature Charts, Reference Materials, Comprehensive Comparison Charts, Screen shots
- **“Tell, Don't Sell”**
- **Depth of product information, not breadth**
- **“Less is more” -- important to product choices and recommendations made**
 - Demonstrate Simplicity, Ease of use, Compatibility
- **Notified about products before their clients**

Evaluation of a Solution

- **What can a developer do to get a ProAdvisor to evaluate the application?**
 - Full working evaluation copy
 - Pre-sales technical support/Training
 - Technical “white papers”
 - Detailed feature lists
 - Product comparison charts
 - Screen Shots
 - Sample reports

Where you can find them

- **IDN Forums**
 - <http://idnforums.intuit.com/>
- **IDN newsletter**
 - <https://developer.intuit.com/> (bottom of page)
- **Solutions Marketplace**
 - <http://marketplace.intuit.com/>
- **Custom Solutions Provider Directory**
 - <http://marketplace.intuit.com/DevResources.asp>
- **IDN Marketplace viewed by Accountants**
 - <http://marketplace.intuit.com/accountant/>