

Partner with Headwaters Insights.

Add real advisory value for your clients — without hiring a BI team.

The problem your clients keep bringing you

You close their books each month. You send them a P&L, a Balance Sheet, maybe a cash-flow statement. And every month, the same question: “So how are we actually doing?” Reading a P&L requires training your clients don't have. They see numbers, not stories. They don't see the March dip, the client concentration risk, or the vendor bill quietly slipping past 60 days.

That's where we come in.

What Headwaters Insights does

We build custom interactive dashboards that turn your clients' QuickBooks, Xero, Shopify, HubSpot, Salesforce, and other business data into a visual story they can understand — plus an ongoing advisory layer that helps them interpret what they're seeing. We don't do bookkeeping. We don't compete with you. We make your work visible and actionable.

Connect	Visualize	Understand
QuickBooks. Xero. Shopify. 200+ integrations. Client data flows automatically into their dashboard.	KPI gauges, trend charts, aging schedules, cash runway. A visual language clients can read at a glance.	Monthly advisory calls that turn dashboards into decisions. Where's cash tightening? Which client is overdue?

The clients you should refer to us

You already know these clients. We serve two profiles — the starter and the growth-stage — with different products for each.

Starter QuickBooks Special — \$500 build	Growth-Stage Custom Buildout — \$1.5K+ build
Smaller QuickBooks users who want fast, affordable visibility. Solo operators, side hustles, or businesses in early growth. Just needs their QuickBooks data made visible — no complex integrations.	Growing businesses (typically \$250K–\$5M) with multiple data sources: QuickBooks + Shopify, HubSpot, Salesforce, Google Analytics, etc. Sweet spots: professional services, manufacturing, construction, healthcare, hospitality, F&B, nonprofits.

Both love hearing “is this normal?”, “what should I be watching?”, or “can you help me understand this?” from you — that's when it's time to refer.

How the partnership works

1. You introduce us	Send a quick email, LinkedIn intro, or invite us to your next call. We take it from there — you never have to sell for us.
2. We meet your client	Free 30-minute discovery call. We scope what they need. If it's not a fit, we tell them — and you.
3. They sign on	Whether they choose our \$500 QuickBooks Special or a custom build with retainer, you get paid — and you keep the bookkeeping relationship.
4. You get referral revenue	10% of the build fee. \$50 for a QuickBooks Special. \$150 for a Custom Buildout. \$550+ on larger builds. Simple, transparent, no tier games.
5. Your client gets visibility	They start seeing their business clearly. They tell everyone who did it. Guess who they refer? You.

Why partners love working with us

- We don't touch your books. Your relationship stays yours. We only work with data that already exists.
- We make you look great. The dashboard reads their business better than any PDF report — and your client credits you for making the intro.
- You add advisory revenue without hiring. Referral payouts are ongoing on retainer clients.
- We're specialized. 25+ years of data experience. Not a general marketing agency dabbling in dashboards.
- We're geographically flexible. Based in West Sand Lake, NY — happy to meet in person around the Capital Region, and fully remote-capable nationwide.

Perfect entry point for smaller clients: Our QuickBooks Special — \$500 build (\$50 to you), delivered in under 2 weeks, \$200/month for hosting and monthly check-ins. Zero commitment for your client to see if they love it.

Let's talk. Book a 20-minute partner intro call at headwatersinsights.com or email hello@headwatersinsights.com

Referral payouts are a flat 10% of the client's build fee: \$50 for a QuickBooks Special, \$150 for a Custom Buildout, \$550+ on larger builds. No tiers, no games.