



8 Essential steps to train a new cloud bookkeeper

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About today's speaker



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Hiring, Onboarding, Team and Training

CPE Process

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- This session is eligible for **1 hour of CPE**
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Agenda

The importance of training internally

Differences between training a cloud vs. traditional bookkeeper

8 Steps for training

Metrics to measure the success

Q&A



The importance of training internally





**What if I train them & they leave?
What if you don't, and they stay?**

-Levi Lusko





Our experience



Team interviews

- None
- 90 Day check in
- Quarterly success meetings



Differences between training a Cloud vs. Traditional bookkeeper



Traditional vs. Cloud

- Approaches
- Resources
- Measurement of success

The skill set of the bookkeeper has changed



8 Steps to effective training



Step 1 – Define the role

**The role of the bookkeeper
has changed**



Step 1 – Define the role

- Deliverables
- Responsibilities
- Measurement of success

Be specific

Step 2 – Excite them

**Excitement encourages
the desire to learn**



Step 2 – Excite them

- You need to be excited
- Changes in the industry
- Acknowledge the fear

Excitement encourages the desire to learn

Step 3 – Roadmap

**They need to know where
they are headed**



Step 3 – Roadmap



35%

Step 4 – Expectations

Be as specific as possible



Step 4 – Expectations

- What does their journey look like?
- Certifications
- Timeline
- Rewards / consequences

Be as specific as possible

Step 5 – Segment the training

Attain proficiency, then move on



Step 5 – Segment the training

- Have a plan
- Manual
- Automate
- Leverage their training

Attain proficiency, then move on

Step 6 – Practical experience

Attain proficiency, then move on



Step 6 – Practical experience

- Repetition is the mother of all learning
- Multiple clients
- Multiple scenarios
- Explain the process

Attain proficiency, then move on

Step 7 – External certifications

**Leverage what is already
created by others**



Step 7 – External certifications

- Don't recreate the wheel
- Additional marketing collateral

Leverage what is already created by others

OUR WALL OF FAME





Step 8 – Encourage, praise & reinforce

**Recognize that you know
it's a big shift**





Measuring success

Measuring success

And you **MUST** measure!



Measuring success

- Internal benchmarks
- 3rd Party Apps – Floqast, Mindbridge
- Feedback to employee
- Ask

You can't manage what you don't measure



Questions?



Train people well enough so they can leave, treat them well enough so they don't want to

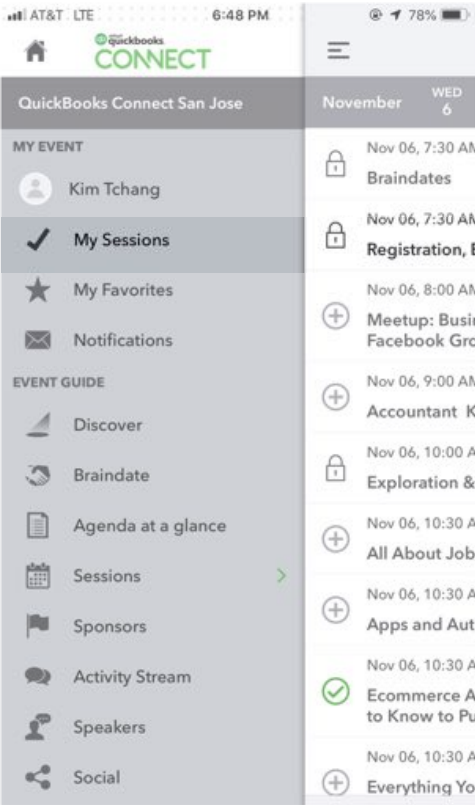
- Richard Branson



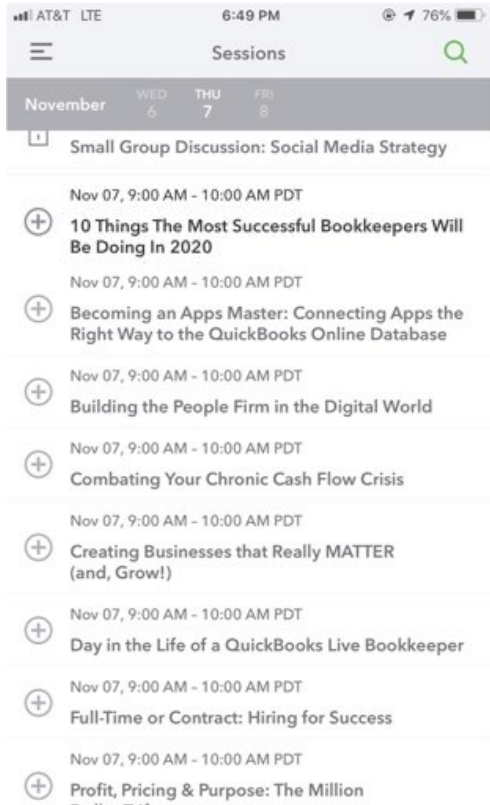
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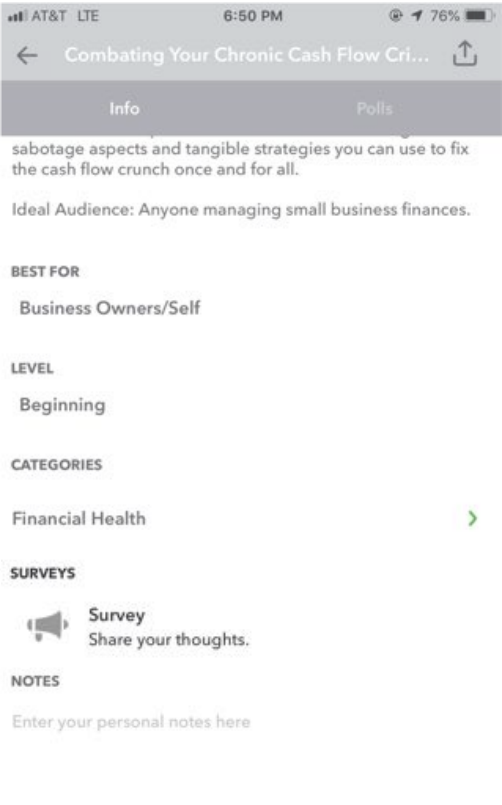
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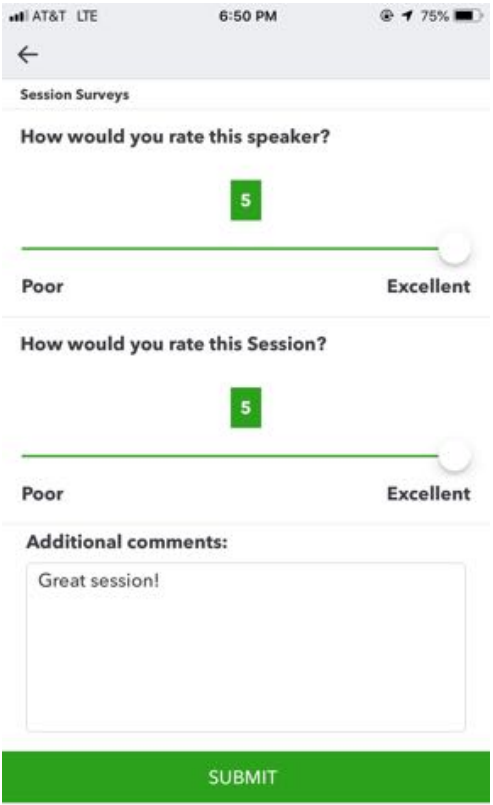
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Print Agenda

Get new insights from experts in business growth, organizational culture, financial health, technology and life skills. Book a Braindate with peers and expert consultant for one-on-one learning. Unwind in the evening with our legendary celebration.

Search for sessions

Filters: Business Growth Life & Business Skills Organizational Culture Technology Training Advisory Financial Health Expand all +

7:30-7:00 am Registration, Breakfast & Exploration

7:30-10:30 am Braindates
New this year, you can use Braindates to book time with fellow attendees, expert consultants and the QuickBooks support team. [Learn more](#)
Best for: All Audiences
CPE Hours: not eligible

8:00-8:30 am Yoga

8:00-8:45 am Breakout Sessions

Small Business Meetup: Relationship Marketing and the Power of Human Connection

Small Group Discussion: Social Media Strategy

Small Group Discussion: Showing up - Why What You Wear Matters

Small Group Discussion: Build Your Dream Bookkeeping firm



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THE
FUTURE