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8 Essential steps to train a new cloud bookkeeper

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About today's speaker

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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
JENNIFER ROBERTSON
SHANNON CURRIE
PAMELA CHEAL
LAURIE BACON
CERTIFICATE OF EXCELLENCE

24%

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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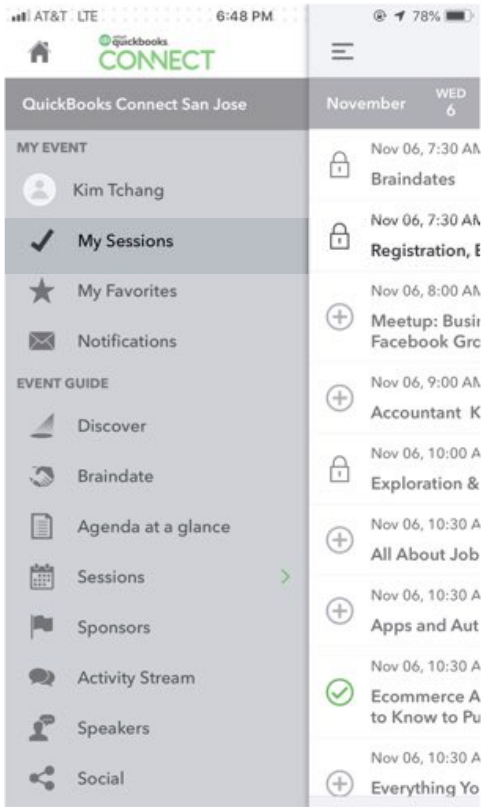

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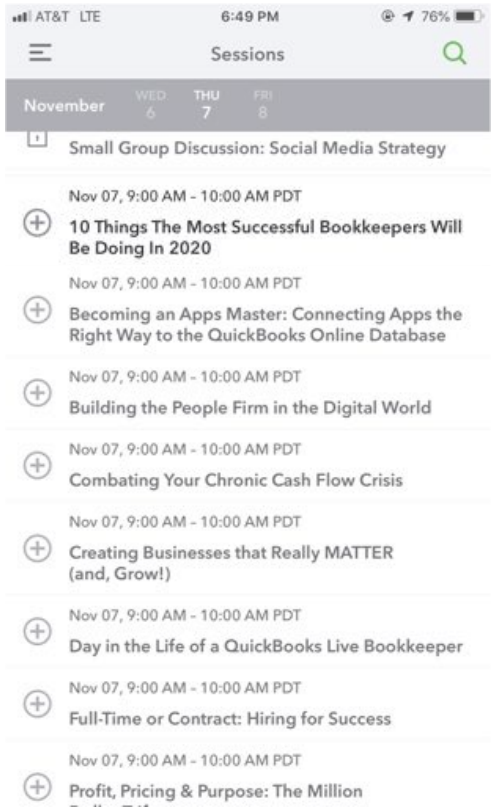

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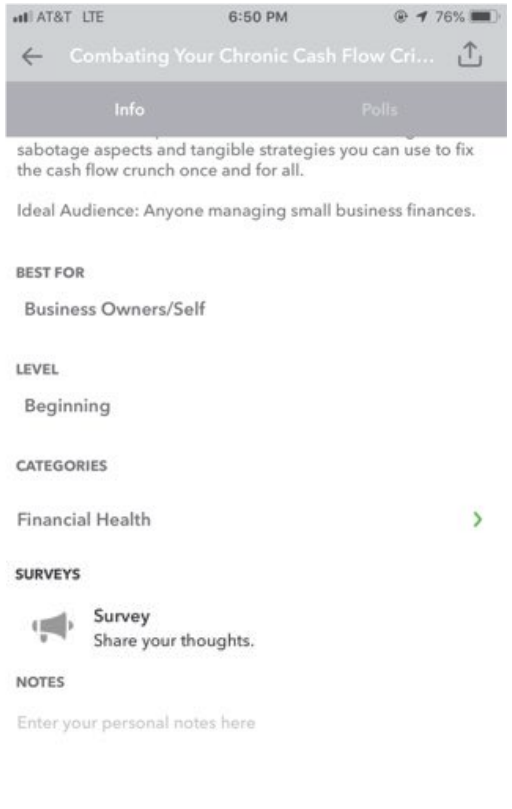

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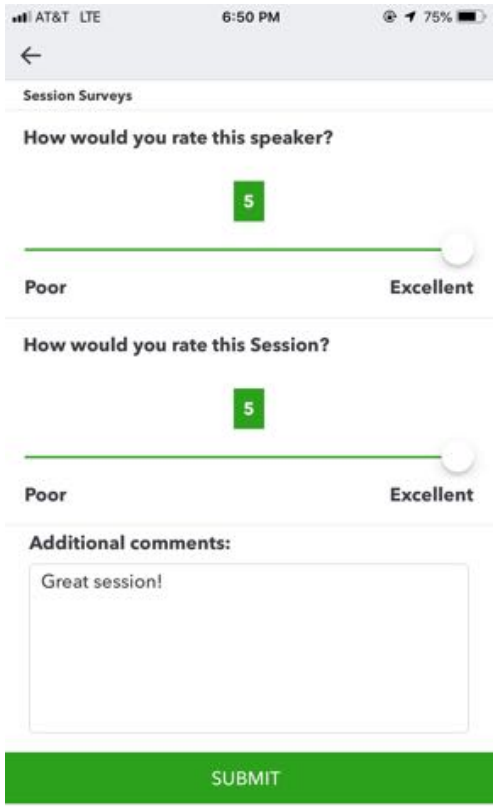

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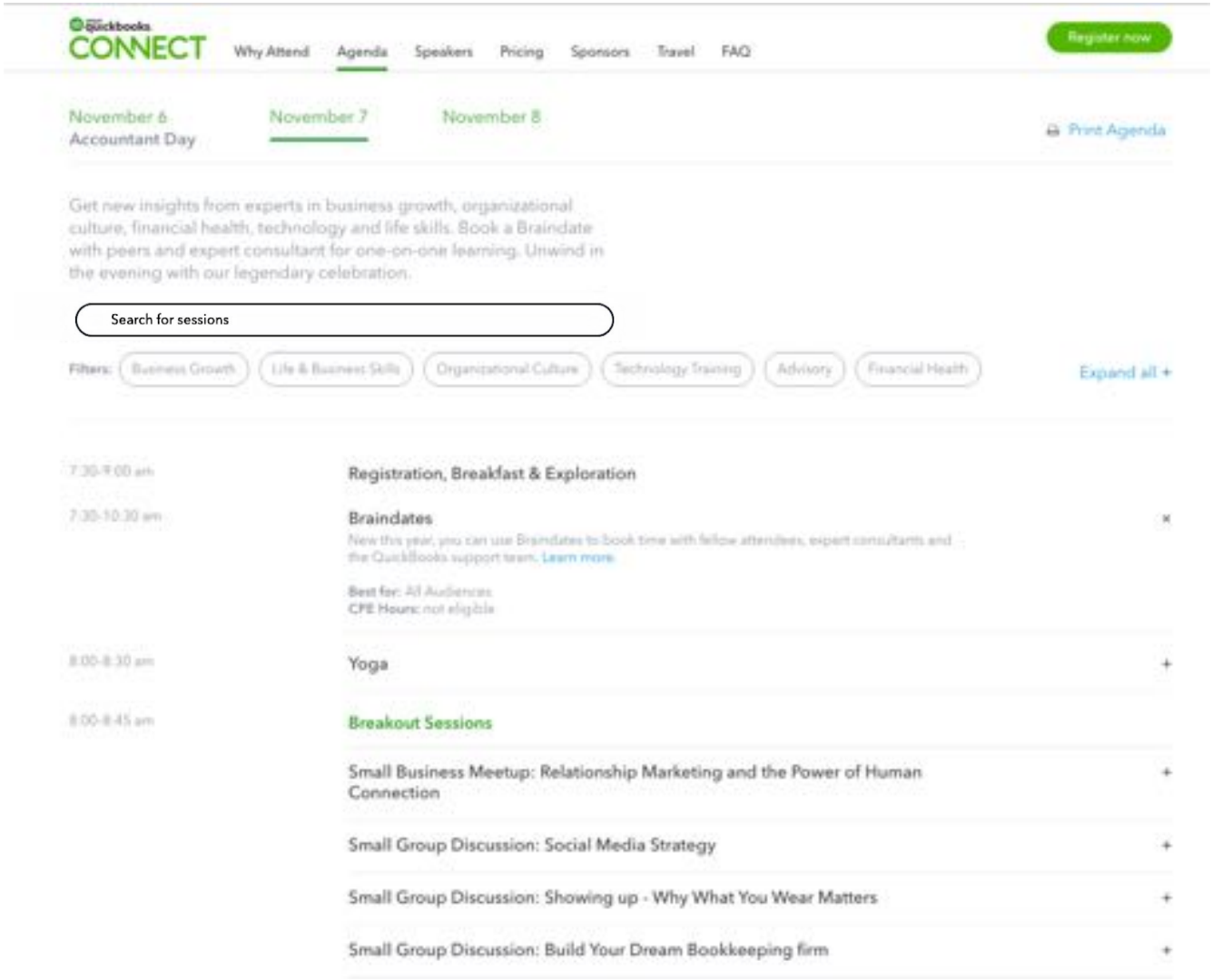

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