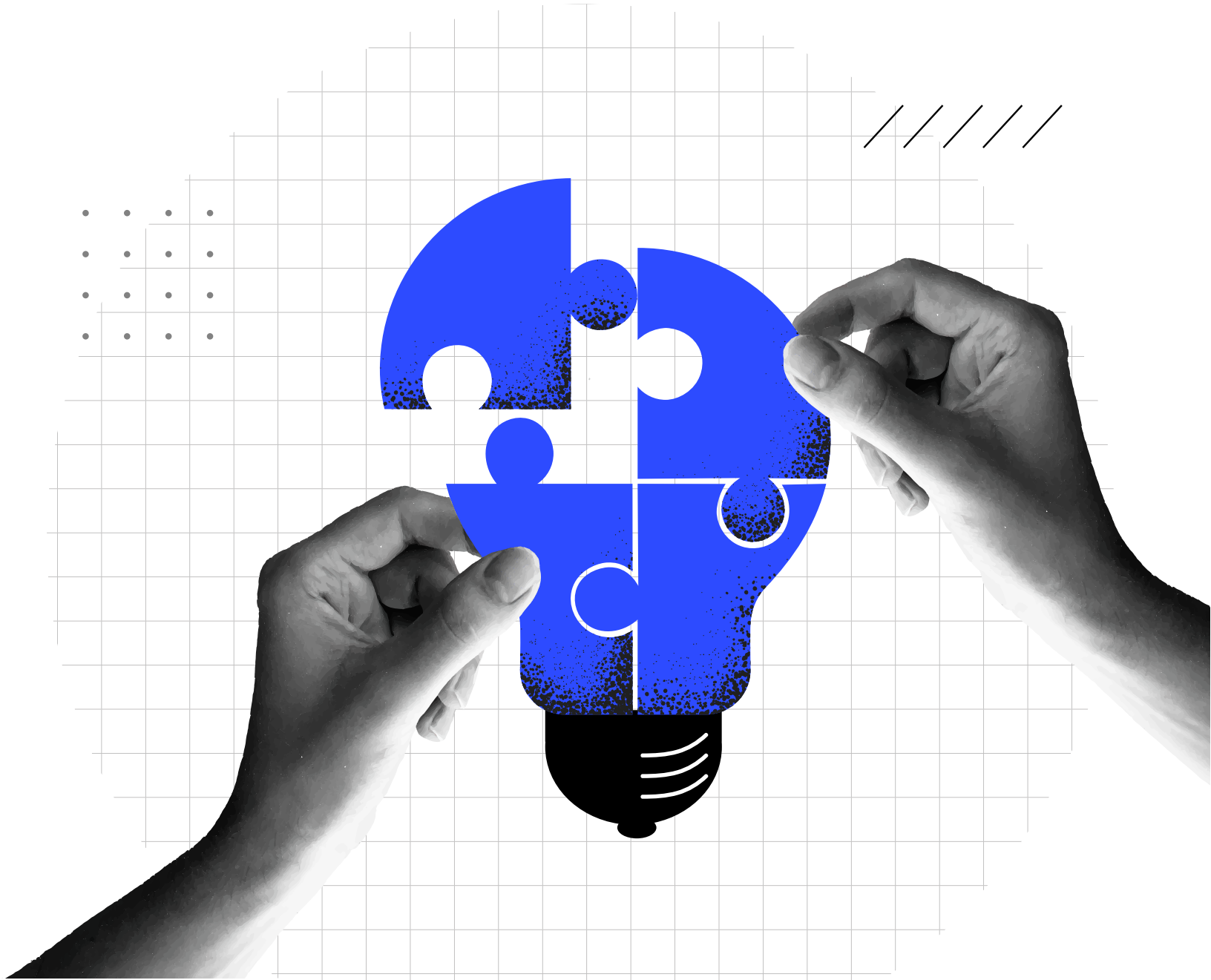
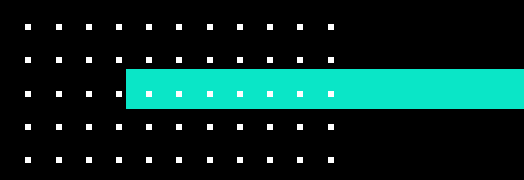




Building the Ideal Team

in Your Accounting Firm





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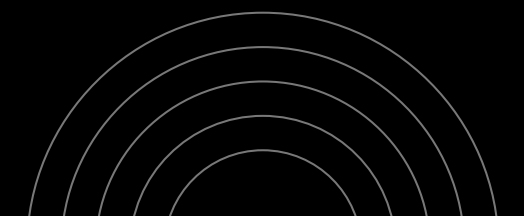
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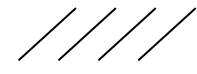
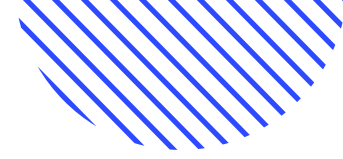
After 20 years of team building, I continue to see how important team building is in the effort to grow a firm. Hiring and leading a team is very difficult, and everyone struggles with the many aspects of team leadership. If you've struggled, you can know you are not alone. Who can know if a team member is the right fit for a firm? Everyone is on their best behavior during hiring and interview processes, so the risk of bringing the wrong person into your team is high. Further, a team member who may have been right for your firm at one point may change in a way that makes them no longer suitable for your firm. As a firm leader, you can't compensate for that.

Cut yourself some slack if you feel like you haven't done this well. Hiring and team leadership are common growth struggles, but we can improve with practice. Hiring and team leadership are skills that improve with reps.

I want to start the eBook by debunking a myth of hiring - if you hire a more experienced team member, that doesn't automatically mean you have found the right person. Don't be fooled; experience on a resume is not all you need when hiring experienced teams. Many firm owners we coach assume that if they can finally afford a more expensive hire with more professional experience, they will finally get to step back from work and focus on growing the firm.

This doesn't always equate. An experienced team member will know *how* to do more complicated tax returns and accounting procedures, but they may still not work *how* you want them to. No matter what level of experience your next hire has, remember that you *always* have to walk them through a training process that shows them how *your* firm works. This is what we will discuss in this eBook: the firm-building tips that allow any firm owner to build a great team. Here are five tips for building great teams that include culture care and professional accountability for the new team member.



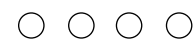


Leverage Recurring Meeting Rhythms

Meetings planned in advance and put on all of the team’s calendars become habitual, and everyone just shows up. Our team meetings are every Wednesday at noon, and we all turn on our cameras. There might be kids or dogs running around, but we all show up, stop working, and participate with everyone in that meeting. Wednesdays are our ‘culture-based’ meetings where we don’t discuss any client work. Instead, we focus on each other, share news about the firm, do some light teaching, remind the team of updated policies, and call out each other on our core values. Getting a meeting like this started can take some practice if you’ve never had it before, but once everyone is seated into the rhythm of a weekly meeting, then everyone shows up without question.

What is a rhythm? We define a rhythm as “an effort that happens at the same time, the same day on the recurrence.” We seek to avoid chaos in our firm because firms don’t grow in chaos. To combat that, we lock into a time and day on whatever effort we try to recur. For our weekly team meeting, our rhythm is noon on Wednesdays. If our meetings were monthly, we would still schedule them at the same time, on the same day every month.

There is immense power in rhythms. You can leverage rhythms not only with your team but also with your clients. If you are serving in a complicated advisory contract, you’ll want to be with your clients more often (we always set a weekly rhythm with our clients when we sell Controllership services). Set a rhythm for a meeting with that client where you meet at the “same time, same day on the recurrence.” Then, the client will lock into a rhythm and show up.



Note that the reason we used the word “leverage” is because your regular recurring rhythm is one of your tools. When you get a team locked into a rhythm together, everyone begins moving together as the firm changes and grows. The rhythm reminds them they are part of a community they must commit to and must participate. We message privately those team members who don’t abide by the rhythms. Those who begin to show themselves unable to comply with the rhythm are the ones you coach and work with to come alongside the rest of the team as we all seek to achieve the same goal.

Leveraging meeting rhythms helps the team feel they are part of something larger than themselves, shows them the group is committed to the firm’s vision, and helps the wrong team stand out like a sore thumb.

Train Team with Gantt Charts

Training is one of the foundational firm practices we’ve seen in all growing successful firms. You can never just hire someone and believe you can finally step away and focus on the firm’s growth (or whatever you want to do). Firms do not operate without the owner/leaders so you have to provide ongoing direction to the team. This can be done by the owner, leaders, management team, etc. This will be a constant necessity as the team changes, grows, gets larger, and deals with more and more complex clients and services. Many firms struggle to know “what am I supposed to train the team on?” So much!

We use a Gantt Chart to lay out what the first 90 days of training will look like for every team member. Ninety days is the key time period for you to know if the new team member is going to be the right fit, so you want to stay close to them.





Train Team with Technology

Our Gantt chart is an ordered list of steps we want every new team member to experience, laid out every week for three months (90 days or 12 weeks). The most important training steps are at the top of the Chart and continue through our Leadership Team as they all take time to meet with the new team members in training sessions. As you might imagine from point #1 above, we leverage rhythms that the new team member is locked into on their calendar so that they are meeting at the same time, same day, every week with the Operations Manager, the Technical Tax Manager, the Project Manager, etc.

Our first order of business on the training Gantt Chart is an orientation into the firm with me and my partner. We discuss the purpose of our firm, our vision, our firm's 'voice' that we seek to maintain, how our partnership works, and also how we communicate as a virtual firm. Virtual firms have to 10x their intentional communication over brick-and-mortar firms, so we spend a lot of time on how we do this virtually in our firm. Then our Leadership Team takes over and walks the team member through calendar workblocking, the communication platform we use online to talk to one another, knowledge capture protocol so we know where all of the firm's proprietary data is stored, our firm's Accountability Chart, and tips and tricks on how virtual team can work focused and efficiently in their homes.

Using ordered tools like a Gantt Chart helps to show the new team members that they are part of a plan and that their focus and commitment to the work of training will make them and the firm an amazing place to work.

As we continue to highlight how important training a professional team is, we also realize that training a team one-on-one is not efficient (though very effective). We'll never give up the one-on-one training with our team. We love to invest in them in that way. As your firm team size grows, you'll want to invest in other ways to bring training to your team. Using AI-based technology like Loom can be an efficient way to document redundant steps you follow over and over.

Tools like Loom that leverage AI to document the steps that you are following in a video are phenomenal. We are seeing this as the main way firms are using AI technology right now. It is to provide heavy lifts on note-taking, documenting steps, and producing meeting summaries for clients. Few trust AI in our technical profession to provide accurate and nuanced answers to the many complicated questions and solutions our clients need. But AI has advanced so far already that it can do a lot of our administrative knowledge capture that valuable firms have always committed to.

We've created a library of our Loom videos in our firm at this point. We put those in our training Gantt chart (mentioned above) and have new team members run through and watch them in their first 90 days of onboarding. After our team has been here longer than 90 days, it doesn't mean they don't still need training. Training never ends in a professional firm.

We will always be training on new services, new processes, newly discovered ways to serve better, and learning new tools like Canopy to help our firms remain efficient and competitive.



4 Key Steps to Hire Well

We've practiced hiring for a long time. We still struggle to get it right. We know that this will be a skill we'll always be practicing. But we can share our four steps to hiring that have greatly reduced our 'misses' when adding to our team. Of course, there aren't really four magic steps to get hiring right, but any firm could take these four steps and change them to match what would be best for that firm. Make these steps your own by adding to them or changing them.

First step

Once we've identified some candidates we would like to interview, our first quick call is a 'resume story' call. This is where we coach the interviewee to walk us through their resume (oldest place of employment first) and tell us stories about the people they've worked with, their boss, or the clients. We even ask them to use their first names to tell us stories of their experiences at each job. When people start telling stories, they start to share with you what they really think about service, leadership, and being part of a team. We've had people complain about their bosses in the stories they tell us! It teaches us so much about a person to ask an interviewee to be more intimate by telling stories. Some aren't that good at telling stories, so you do have to coach some through the process. But it's worth the valuable information you uncover.

Second step

In the next meeting, we take 90 minutes to make a presentation to the interviewee. Instead of them talking, we do the talking this time. We tell them we'll share our screen and go through a presentation on our firm's vision and values. We share our purpose, the voice of our firm in the marketplace, and our niches, and then explain each core value that we believe in. We tell them that we are asking them to abide by the same core values that our whole team works and lives by in the firm. You can tell who is interested and who is just trying to get through the meeting.



Third step

Since my partner and I need help to lead our firm, we have our two leadership team members meet with the candidate in the 3rd step. They see things we can't see, and they deeply care about bringing on a new team member that they will also have to lead. Our leadership team will often ask more technical questions that are related to their role. This allows my partner and I to stay high level and share visionary values in our time with the candidate. We are always seeking to make an offer between at least three great candidates if we can. It's never wise to hire from a choice of one. Hiring is so important that you want to do it when you have a number of great choices in front of you. Our leadership team picks the team members with us or helps us to say no to candidates, too. Their perspective is key in getting this right. If we want to move forward, we then do a background check, and I begin calling their references.

Fourth step

This last step is where we ask for some last pieces of information, clarify things that were confusing, or make an offer to the candidate. But first, we share a few key parts of the policies in our firm that they will have to abide by. These policies are more practical in that they will need to perform their role than the core value commitment from an earlier call. We tell them that these policies related to the culture and work of the firm are some things they are agreeing to if they come on to the team. We ask if there are any other questions, and then we will usually make the offer at this point. If after the 3rd step above, we find they may not be a good candidate, we'll email them and tell them we are going in another direction so that we don't waste their time with this 4th step.





Stay Close to Your Team in Quarterly Conversations

These are some of the best ways we stay close to our team. As a general rule, firms are healthy and grow with less chaos when the owners stay close. Owners who are distant, disappear a lot, or just leave the team to themselves will not have a safe culture where the team is being challenged, growing, and improving the value of the firm. So, it's important to stay close to your team as the leader/owner. How do we do this? Just like any healthy practice in our firm, we apply rhythms to this important part of team care. The new team is in a regular rhythm of monthly conversations with me and my partner for the first six months. Teams that have been in our firm longer than that participate in the same conversations but on a quarterly rhythm.

There is a balance to this rhythm. We see some firm owners who want to be really great leaders, so they meet weekly with each team member. This can be too much since a firm owner can meet weekly with a team that is growing to 15, 25, 30, or 40 people. So you need a rhythm that makes sense for the time the owner has available and also for the history the team member has in the firm. The new team needs more help, guidance, and accountability reminders, so we use monthly conversation rhythms. We expand those at a tenure of 6 months or earlier if a team member is really getting their feet underneath them and clicking into the culture.

With each rhythm, whether the team is in a monthly or quarterly rhythm, we have a set of questions we have them answer before we meet with them. Our Strategic Operations Coordinator gives them the questions beforehand so that they can post those privately to us in our online chat system. This prepares me and my partner for the conversation, and we often have additional questions that allow us to ask more confidential and intimate questions with the team members to show them how much we care about their growth and enjoyment in the firm.

Staying close to your team makes sure they feel cared for and that they will feel the accountability and commitment you need from them to serve clients well.

Have you identified any opportunities you have to build a great team? It's worth it. If you build a great team using the tips in this eBook, you are making an investment in your future as the owner. Your future growth and your ability to step away from your growing firm can come when a committed team steps up to serve when you can't. Building great teams not only improves your service to clients but also ensures your future succession plans, so don't take this work lightly.

I'll leave you with five key questions to apply the wisdom from the eBook:

1 What one rhythm could you implement in your firm that might shore up some areas that are a little too loose right now?

2 Can you make a list of the top 10 things you want your future team to be trained on (then you can train your current team on them)?

3 What new piece of technology have you been putting off implementing in your firm?

4 What of the 4 team hiring steps could you implement as a priority that would protect your firm the next time you need to hire?

5 Do you have a rhythm of team meetings that helps your team to feel close to you and each other?

