

# Engaging the right talent for tomorrow



# Today's presenter:



**Anthony Fernandez, MPA**

Partner/Director of Operations

*Strata Cloud Accountants*

# Your Xero team:



**Chris Earley**

Senior Account Manager



**Maghen Lormand**

Regional Account Manager

# **Today's** **AGENDA**

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**Talent pool**

**Post Covid trends**

**Attracting good talent**

**Develop your brand**

**Create a hiring plan**

**Determine a retention plan**

**“The race for  
talent is over.  
AND TALENT WON.”**





# Talent market

**1M+**  
Accountants & Bookkeepers



**660K+**  
CPA's



**5.4%**  
Unemployment

# Industry trends

**30%**

Transition to another firm



**70%**  
Industry transition



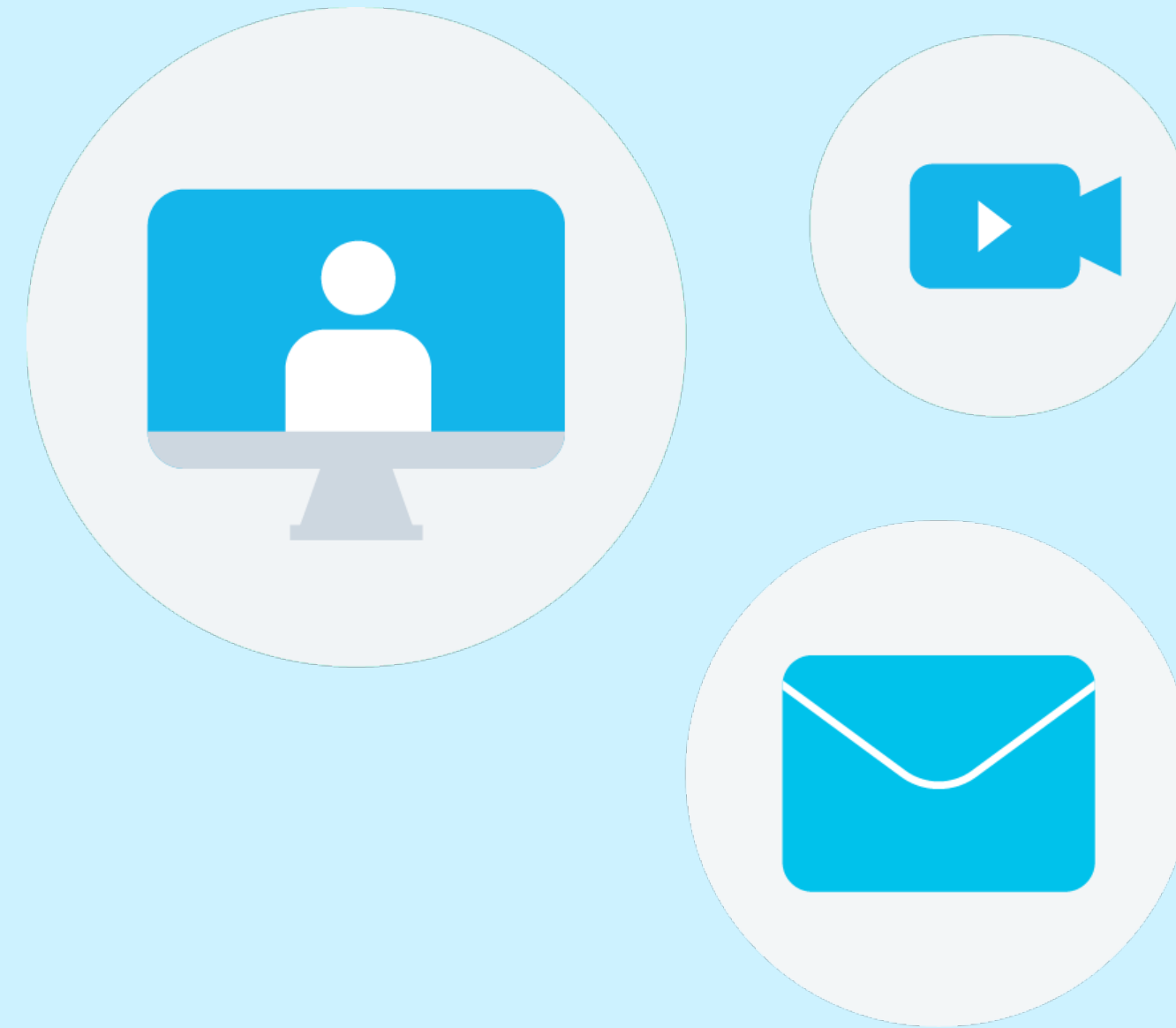
**70%**  
Work life balance



# Post-covid flexibility

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- Setting employees up to work remote



## Equipment

Laptops, headphones, microphones,  
video equipment, etc

# Post-covid flexibility

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- Setting employees up to work remote



## Security

Policies, VPN's, password protection



# Post-covid flexibility

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- Setting employees up to work remote



## Remote working guidelines

Regions to work, hours, setting expectations, ensuring proper equipment, etc.

# Post-covid flexibility

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- Setting employees up to work remote

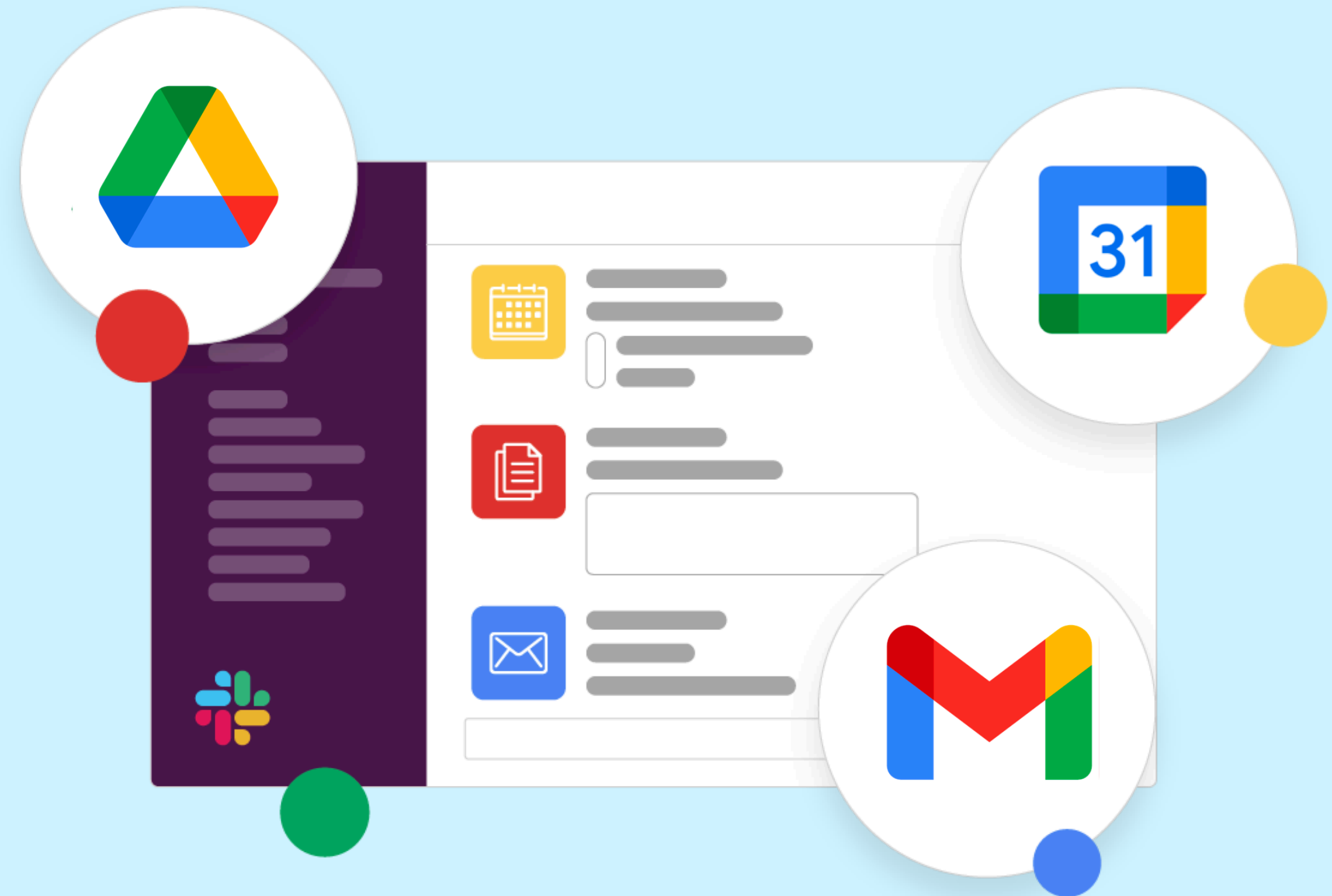
- **Tools to use**

Shared drives

Project management

Online collaboration

Messaging tools



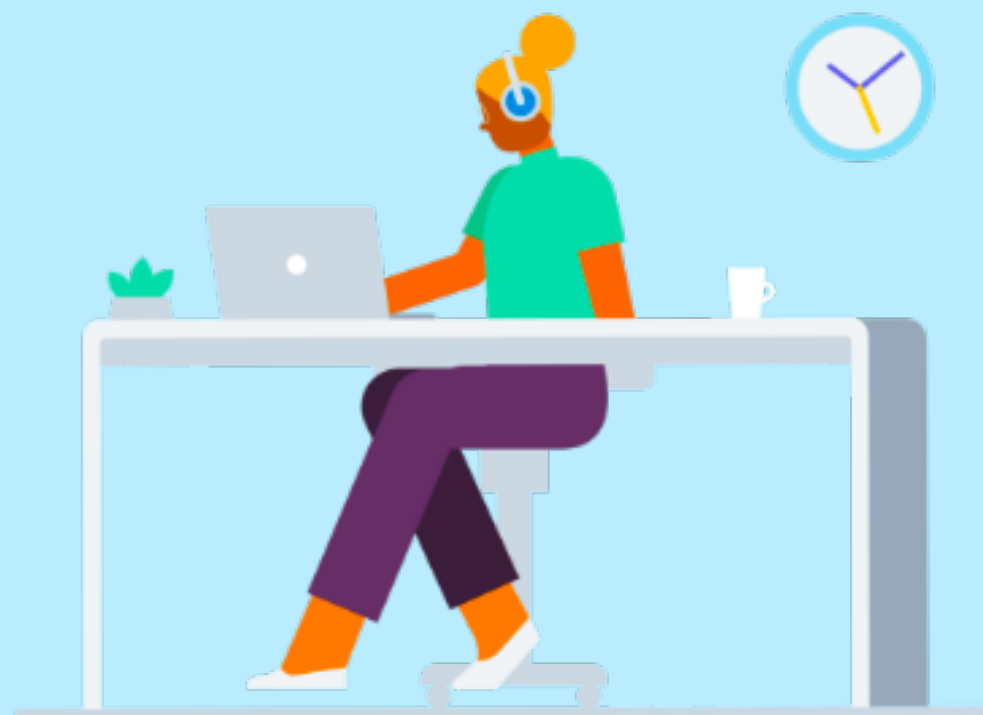
## Remote sharing and communication

Google Drive, Asana, Slack, Microsoft Teams,

# What is attracting GOOD PEOPLE



**Remote  
working**



**Firms that act like  
startups**



**Company  
culture**

Planning your

**HIRING APPROACH**

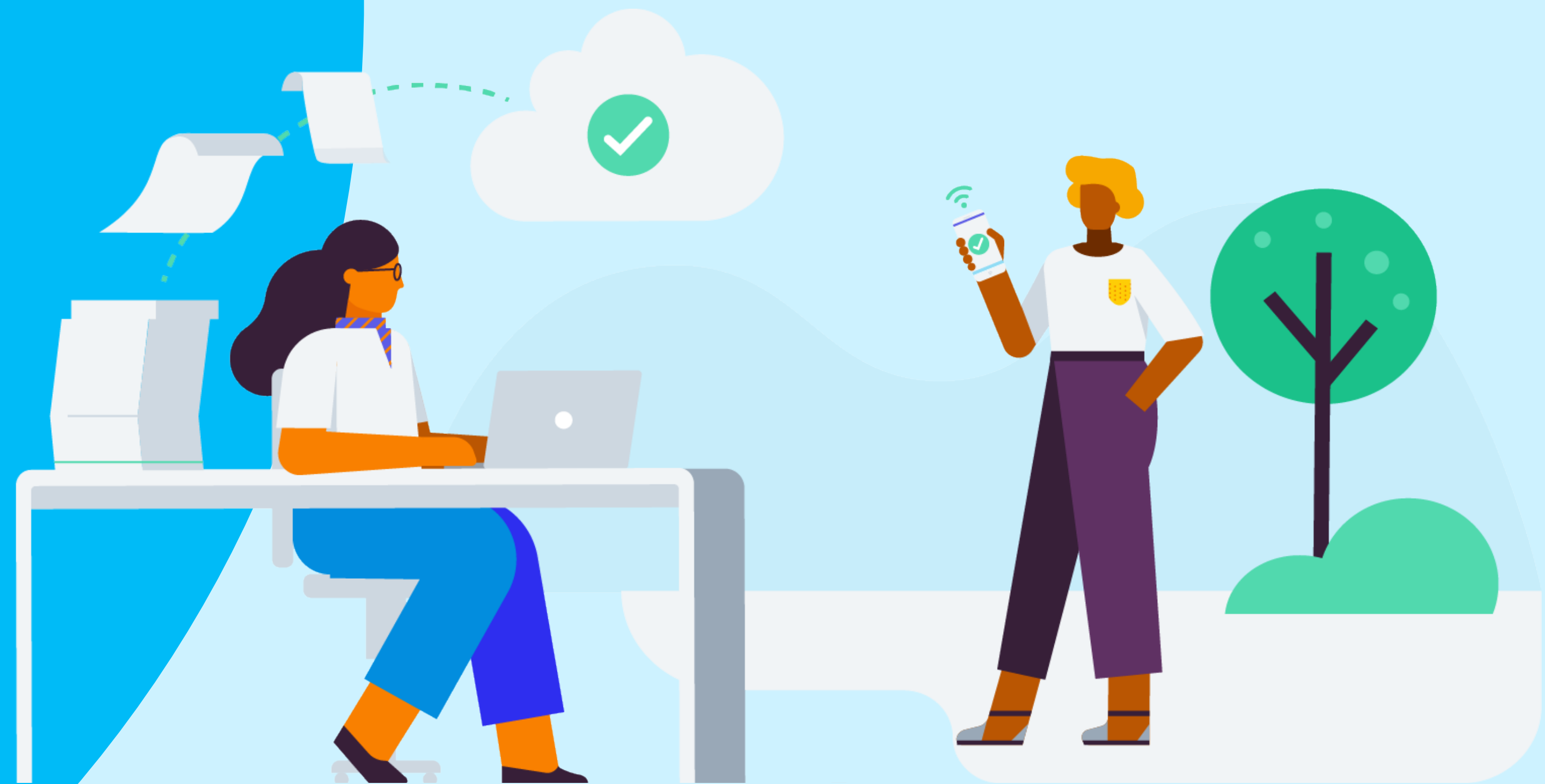




*Position your firm*

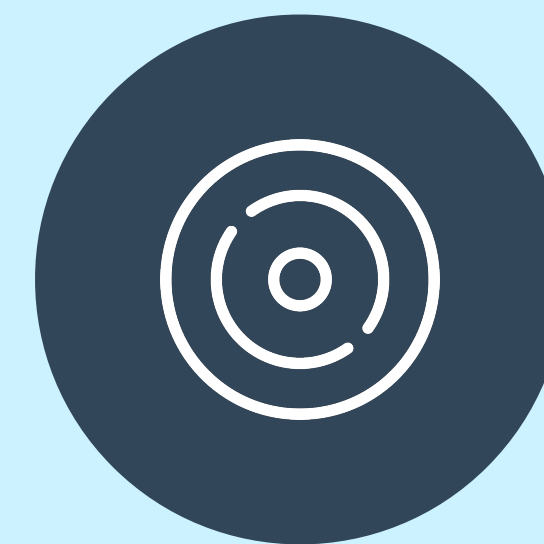
# EMPLOYER BRAND

**Create a firm that  
meets the needs of  
your best candidates**



*Position your firm*

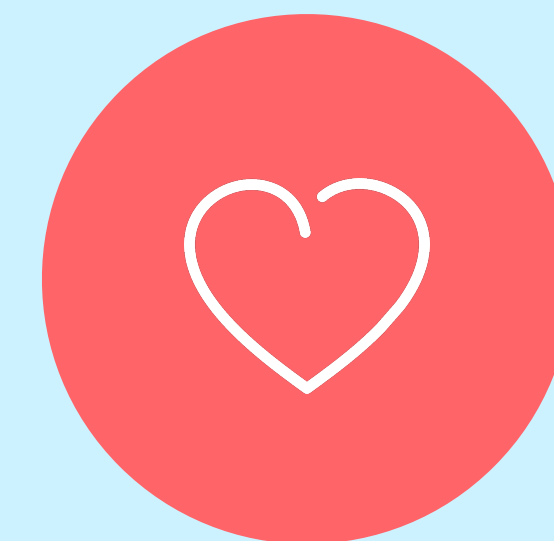
# COMPANY VALUES



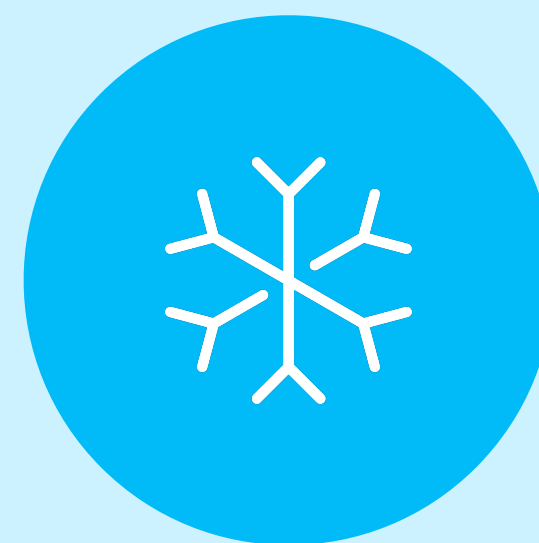
**#challenge**



**#ownership**



**#human**



**#beautiful**



**#team**

***Position your firm***

# **BUILDING CULTURE**

**\* Work life balance**

**\* Hire remote staff - TOA**

**\* Build off existing culture**



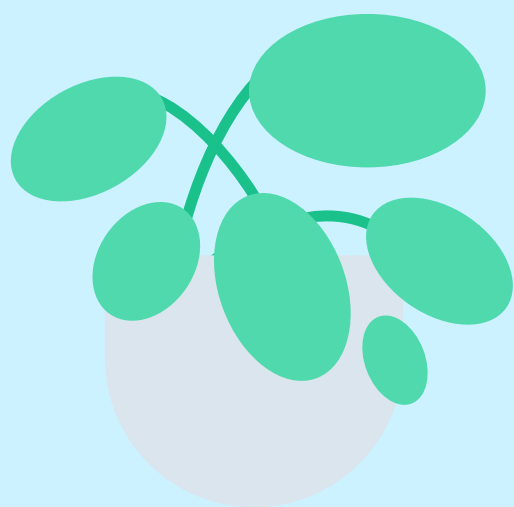
***Position your firm***

# **BUILD A HIRING PLAN**

**\* Articulate your recruitment plan**

**\* Role clarity**

**\* Job postings and career sites  
that don't suck**





***Position your firm***

# BUILD A HIRING PLAN



\* **Job postings and career sites  
that don't suck**



**bamboohr<sup>®</sup>**



**indeed**



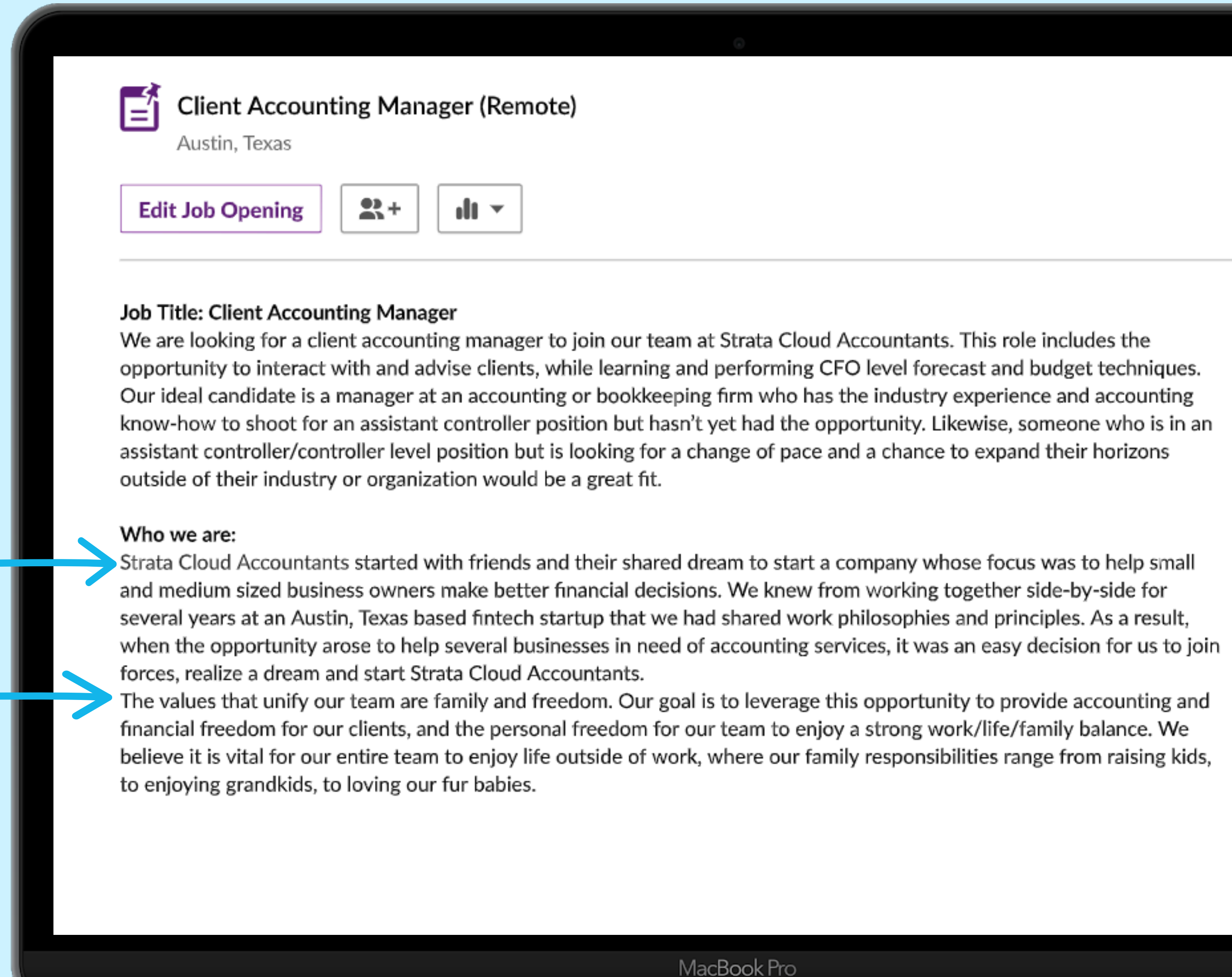
**glassdoor**

# Job descriptions

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Company culture

Work life



# Job descriptions

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## Required experience



### Position Description:

The Client Accounting Manager will be responsible for leading the engagement and services for a set of our clients with a focus on customer satisfaction and producing high quality deliverables.

As part of our team, you will guide the client's journey from onboarding and setup through the implementation of an analyst and ongoing accounting processes. Documenting expectations and understanding their unique business is essential to maintaining a positive relationship.

You will be reviewing the work of our analyst team as they produce the month end close, ranging from simple bank reconciliation to more complex deferred revenue, CPG inventory, payment processor reconciliation, and more.

You will be generating CFO-level reporting on cash flow management, forecasting, budgeting, project management, and customized financial statements, suitable for a board meeting or investor reports.

Confidentiality and mutual respect with our clients are a must! All clients will be met with at least monthly and being comfortable maintaining an amicable professional relationship remotely is essential. Our whole team is remote, so experience in managing employees and clients remotely is very beneficial and desired.

### Requirements:

All candidates for the position must meet the following criteria:

- Experience: 2-5 years of experience performing professional accounting services for clients.
  - Preferably: a multiple client load organization e.g. a CPA firm
  - Ideally: Cloud accounting or public accounting experience
- Education: Degree in accounting or similar from a 4-year college or university
  - Additional education or certification such as MPA, MBA, MTax or equivalent experience a plus
  - Ideally: CPA or CPA-qualified
- At least one full year in a supervisory role reviewing the accounting work of others
- Familiarity with the accounting for multiple industries and complete understanding of full cycle accounting
  - Preferably: the practiced ability to communicate these concepts to a beginner-level customer



# Job descriptions

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Total compensation package

Benefits for the candidate

- Familiarity with the accounting for multiple industries and complete understanding of full cycle accounting
  - Preferably: the practiced ability to communicate these concepts to a beginner-level customer
- Software knowledge: Solid understanding or willingness to be brought up to speed quickly on Xero, QBO/QBD, Gusto, Bill.com, Hubdoc, Teamwork, Slack, Expensify, Receiptbank, Spotlight, and other modern cloud accounting software
  - Preferably: experience using these with clients, knowledgeable about integrating software across systems
  - Ideally: QBO/Xero/Spotlight/Bill.com Certification
- Designated office space within your home
  - As a fully remote team, it is essential for client meetings that you have a space set aside for video meetings. A quiet space with no distractions and an appropriate background suitable for sharing video with a client or prospect daily

## Compensation

- Salary: \$70,000 with potential for more for the right person
- Percentage commission for new business brought in
- Bonus potential at direction of management team
- Room for growth as business and responsibilities grow!

## Benefits:

- Excellent BCBS health insurance, company contributing 60% to personal premiums

<https://stratacloudaccountants.bamboohr.com/hiring/jobs/21>

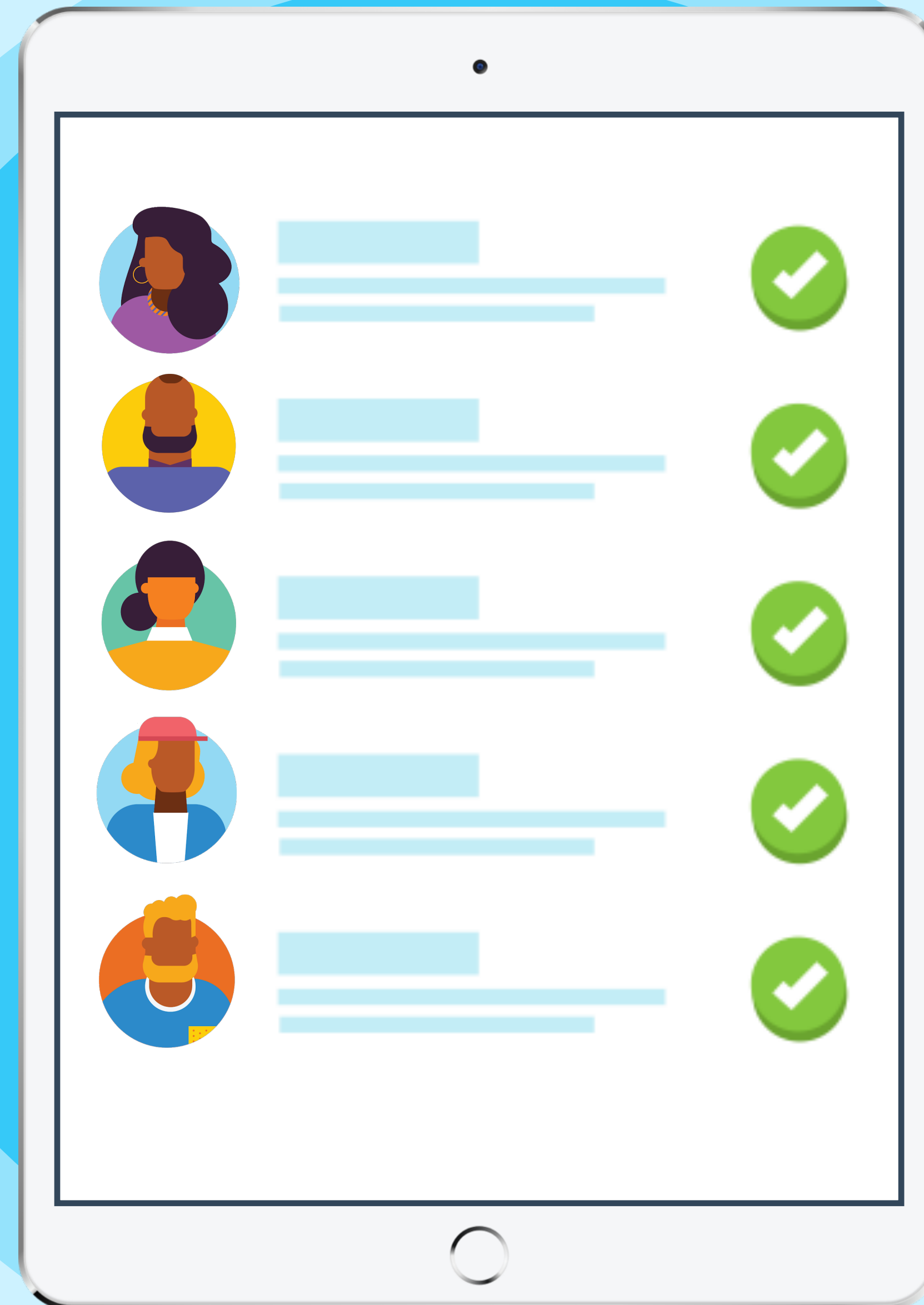


***Build a hiring plan***

# PROCESS

**Screening, selection and closing, interview scripts:**

- Applications in one place
- Respond fast
- Be prepared to sell



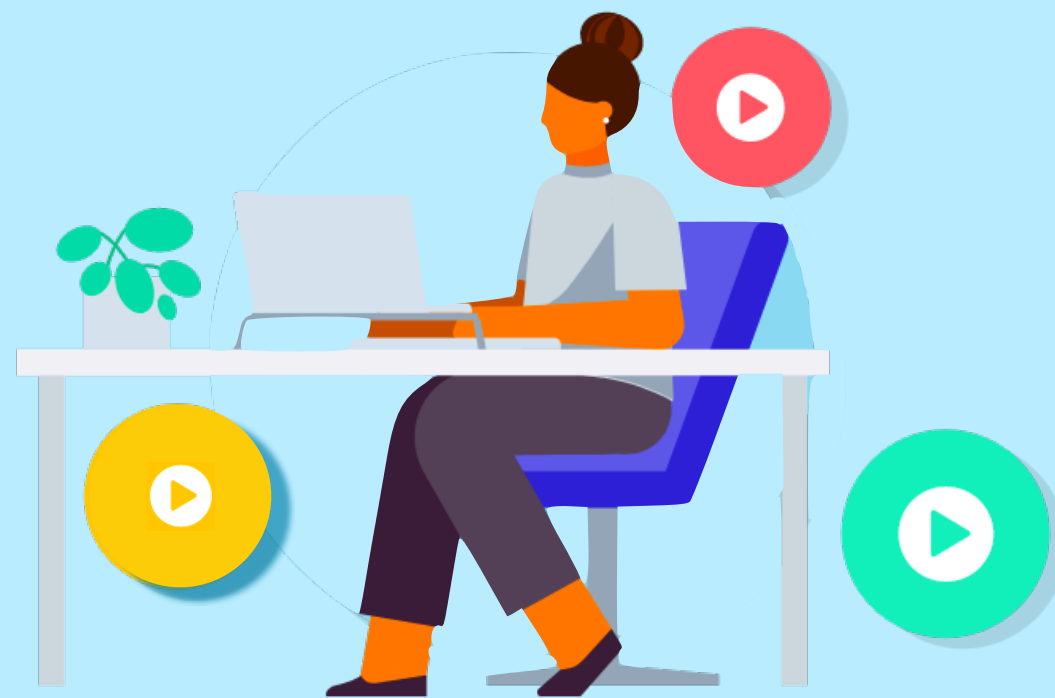
**System for**  
**RETENTION**



# Retaining the GOOD PEOPLE



**Interviews**



**Onboarding**



**Continued  
engagement**

*System for retention*

# INTERVIEWS



\* **Decision maker**

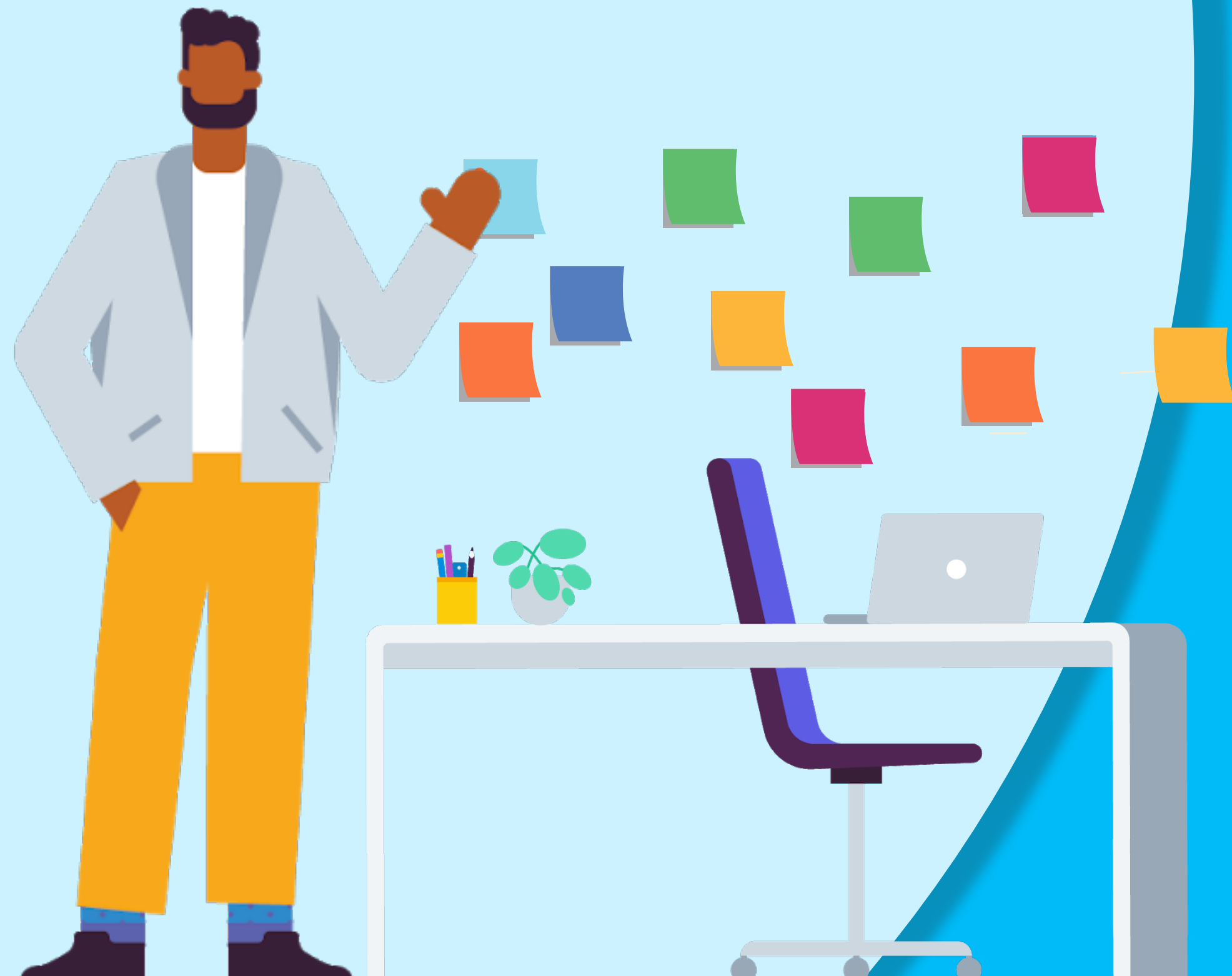
\* **Communication**

\* **Interview guide**

\* **First impressions**

*System for retention*

# ONBOARDING



\* **Clear expectations**

\* **Training**

\* **Welcoming environment**

*System for retention*

# CONTINUED ENGAGEMENT



\* **Regular 1:1's**

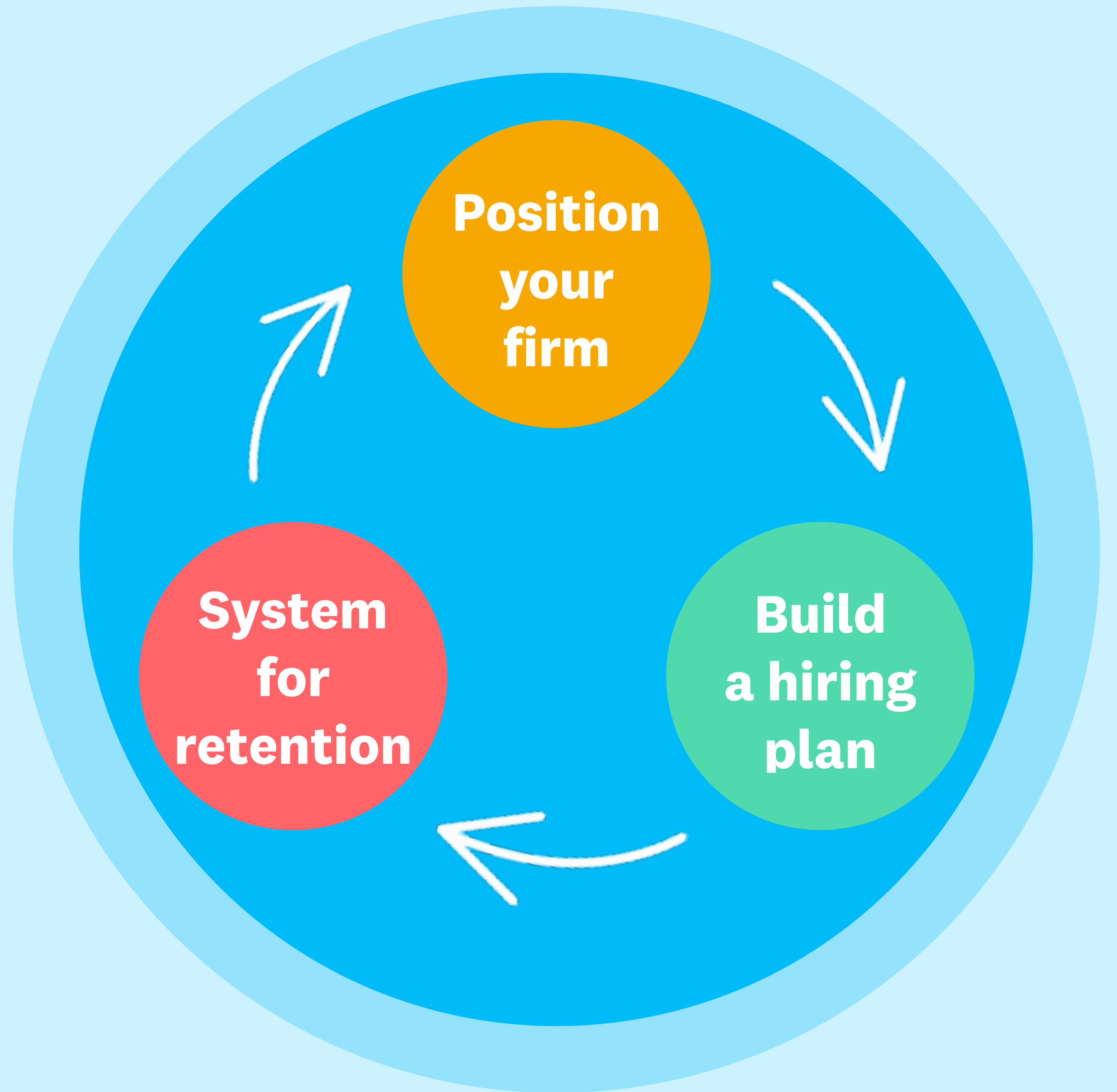
\* **Recognition**

\* **Opportunities**

\* **Team bonding**



# Plan your HIRING APPROACH



**Q & A**



**Thank you!**

