



CRASH COURSE

Recruiting for accounting firms

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Welcome

Thanks for dropping by! At [Accountingfly](#) and [Gusto](#), we know how hard it is to hire for your accounting firm — which is why we've created this guide, made just for you. Inside, you'll find step-by-step instructions to help you build your accounting dream team. First, we'll show you how to create a company culture that is meaningful for your firm. Then, we'll explain how to use that foundation to find and attract the people your firm needs to succeed. We've also slipped in case studies, checklists, templates, and other resources to make each step a little more seamless. Without further ado — let's get this recruiting show started!

01

All about company culture

What is company culture?

Think “culture” is just some outlandish HR lingo? Think again. No matter the shape or size, every company has a unique personality, crafted by the amazing people who work there. And your accounting firm’s culture first takes flight the moment you bring new people on board. But what does it have to do with recruiting accountants? Simply put, firms with great cultures attract great talent. Devoting time to culture building has a twofold effect — it will help you differentiate your firm while supercharging the purpose, productivity, and ultimate happiness of your team.

When it comes down to it, culture is your company’s DNA. It’s where your past, present, and future merge. It’s also a recruiting tool in disguise because it does so many other powerful things, like enabling your employees to find their place within your organization. Likewise, if a teammate doesn’t know an answer to something, your culture will help them find the right way. And when you look at hiring through a cultural lens, you’ll be more likely to find candidates who have the qualities your firm needs to thrive.

If you already have a mission statement or set of values, you may be more comfortable with the concept of company culture. If not, that’s okay too — we’ll help you warm up to the idea. Now, take a step back and get introspective with us:

“There is a perception among high performers that many accounting firms are not great places to work. It’s part of the reason so many leave for private opportunities. High performers expect a GREAT culture, so it’s imperative that you take the time to develop a wonderful place to work. Ignore it at your peril.”

REBECCA RYAN • CONSULTANT
& FOUNDER, NEXT GENERATION
CONSULTING

“HPC is a team of all-stars. In exchange for top performance, everyone gets to work when they want and where they want. That means good teamwork is essential. To facilitate this, HPC is an open book. All calendars, projects, tasks—even financials—are shared. The result is that the employees really feel like a team and will step in to support each other whenever needed.”

BRUCE PHILLIPS • CEO AT HPC



FILL IN THE BLANK

1. What's the main thing that matters to your company?

2. Why do you come to work each day?

3. What are some reasons you think the rest of the team comes to work each day?

•

•

•

4. What impact are you trying to make on the world?

Once you start answering these questions, you'll begin to think about your firm in an entirely new way. When that mindshift occurs, you'll be ready to find people who believe in the things you hold dear.

"Real cultures are built over time. They're the result of action, reaction, and truth. They are nuanced, beautiful, and authentic. Real culture is patina."

JASON FRIED • CO-FOUNDER
& CEO OF BASECAMP

"I came to see, in my time at IBM, that culture isn't just one aspect of the game, it is the game. In the end, an organization is nothing more than the collective capacity of its people to create value."

LOUIS GERSTNER • FORMER
CEO OF IBM

How to define your company's core values

Next stop, values. These beliefs aren't corporate fluff — they're what reinforce your team's purpose day in and day out. By codifying the things you believe in, you'll be able to give them a life of their own.

Here are some guidelines on how to unearth those gems of wisdom:

ASK THE TEAM

The easiest way to get your team's input is by, you guessed it, just asking them straight out. Make sure everyone is involved and knows exactly what's happening while coming up with your list. Transparency is key — and meta, since it may very well be one of your values.

Zappos' CEO Tony Hsieh made sure his entire company had the chance to contribute during the values creation process. You can even use an email similar to the one Hsieh sent to his entire staff: *"Companies have core values, and we're working on defining them explicitly for Zappos, so everyone is on the same page... please email me 4 or 5 values that you live by (or want to live by) that define who you are or who you want to be... Each value should be one word or at most a short phrase (but ideally one word)... Please email me the values that are significant and meaningful to you personally, not necessarily having anything to do with the company's values..."*

HOLD A BRAINSTORMING SESH

Another way to get your team involved is by conducting a group brainstorm. You can either let your team marinate on the topic by giving them prompts beforehand, or you can do it freestyle by explaining the goal right when the meeting begins.

"Find people who share your values, and you'll conquer the world together."

JOHN RATZENBERGER •
ENTREPRENEUR & EMMY-
AWARD WINNING ACTOR

Here's one strategy the Buffer team used to create their values set. First, pass around two colors (or shapes) of sticky notes. You can also have everyone work in the same Google Doc if you want people to feed off each other's ideas. Do whatever feels right for your team.



VALUES EXERCISE

For 20 minutes, instruct everyone to answer the following question:

- What are some words that currently describe your company?

When the timer dings, make everyone put their pencils down. Then, set the timer for another 20 minutes and have them answer the next question:

- What words describe how you want your company to be?

Once you have both stacks of notes, group similar words together in a shared doc. Share it with your team and instruct folks to pick their top five values from each group. Rinse and repeat until you've slimmed down the set. During the final phases, wordsmith your values to reflect the kind of culture you're trying to build.

Before you know it, you'll have a set of polished values ready to guide your team to greatness.

How to create a values-driven practice

Why does all this stuff matter? Well, people are happier when they work at a place that means something to them. And when people are happier, they can do greater things. Here's an example from a 2001 study on organizational behavior:

- While observing a group of hospital custodians, Yale's Amy Wrzesniewski found that purpose, not money, was what motivated each person to go above the call of duty. Although the custodians' tasks did not include comforting patients, that act alone was what gave them meaning throughout the day. As a result, the group was happy to do extra work to take care of patients — including joking and dancing with them — even though they weren't compensated any extra.

One of the best ways to create that kind of meaning at work is by living out your values. Whenever anyone interacts with your firm — clients, employees, partners — your values should be what turns that experience into something positive, personal, and uniquely you.

It's also important to note that embodying values isn't just a job for the partners — it's everyone's role. In this chapter, we'll explain specific ways you can help your firm breathe the values you preach.

TIE VALUES TO ACTIONS

Your values are a built-in sounding board. Whenever anyone on the team is confused about an idea, those beliefs are there to help them find an answer. And the more you use them, the more powerful they'll get. One way to punctuate the importance of your values is by making them a part of your daily language. For example, when you use a particular belief to guide you through

“Values are like fingerprints. Nobody's are the same, but you leave 'em all over everything you do”

ELVIS PRESLEY

a decision, explore how it influenced your thought process. Using your values regularly will elevate them from lifeless words on a website into something quite real.

Another way to animate your values is by setting up a program where employees can recognize each other for embodying them. Use a peer recognition tool like Bonusly to allow employees to keep track of values-oriented actions, and then award prizes to those who rack up the most points. Priming the team to keep an eye out for these behaviors will help turn your values into an important part of your everyday life.

RETHINK THE CLOCK

While talking about values, let's also bring up a hot-button issue in the accounting sphere — value-based pricing. Many firms are shedding the idea of billing their clients by the hour, and instead setting prices based on the value of the deliverables. When firms introduce this new kind of pricing model, it has a ripple effect on their firm's culture. Employees stop focusing on tallying up their hours, and instead, start working together as a team to reach a common goal. Keep value-based pricing in mind while revamping your firm's value system.

OPEN UP THE LINES OF COMMUNICATION

Values are also a vehicle for making people feel more open with each other. In fact, communication is ingrained in the entire values process, from inception to its acceptance by the team. Communicating well is how your team can have a say and feel like they know what's going on behind the scenes. Letting it flow freely, whether in the form of casual Slack conversations, feedback surveys, or larger all-hands meetings, are all important ways to make people feel like your beliefs are an extension of your culture.

DO GOOD

Your values pulse with purpose, and for many Millennials, it can be a main career driver. In the 2015 Deloitte Millennial Survey, 60 percent of participants agreed that their employer's "sense of purpose" influenced their decision to join the team. So what better way to help people find

that meaning than by helping others? There are heaps of ways you can incorporate social good into your company, and we've laid out a few of them here:

- Schedule team volunteer days through a service like [VolunteerMatch](#)
- Allow employees to choose where they donate their time by setting up open volunteer days
- Donate a percentage of your profits to the charity of your team's choice
- Match your employees' charitable donations
- Share your accounting knowledge by teaching a free class to the community

These are just a fraction of the ways you can promote your values through action. Seeing them come to life is an incredible feeling, so get out there and start spreading the love.

What should my onboarding experience look like?

Some accounting firms think that once the offer letter is signed, the hiring process screeches to a halt. Achievement unlocked, mission accomplished, right? Well, not exactly. One of the most important parts of hiring is how you welcome a new employee to the team, which in the hiring world is called the onboarding process. And no, you don't have to talk like a pirate to do it right.

So why does onboarding matter? Well, you can't just sit someone down and expect them to know all the ins and outs right from the get-go. BambooHR recently found that one in six people left or thought about leaving their jobs as a result of a bad onboarding experience.

"I am convinced that nothing we do is more important than hiring and developing people. At the end of the day you bet on people, not on strategies."

LAWRENCE BOSSIDY • FORMER
COO OF GE

Your new hire doesn't have psychic abilities — they need your team's love and support to make a smooth transition into the role. Good onboarding deepens your culture while making new hires feel integrated, trained, and ready to do awesome work.

Here are a few tips to help you develop an onboarding program that's truly on point.

START ON DAY ZERO

Before ever stepping into the office, your new employee should feel like they received a virtual hug from everyone on the team. Consider sending them a personalized welcome gift when they officially join, chock full of company swag and books you think they may like. Be sure to also schedule occasional check-ins during the first few weeks to see how they're doing. This is particularly important for new grads, who may be hired over six months before they start.

ADD SOME FLAIR

Think of your onboarding program as another way to show off your firm's sheer awesomeness. Make your new hire's jaw drop right from day one by doing the following:

- Decorate their desk with silly string, balloons, and anything else that emphasizes your company's personality
- Announce your teammate's arrival on your social media channels (if they like the attention, and it's something marketing is cool with)
- Have everyone sign a giant welcome card
- Bring breakfast in so the team can meet them right away
- Turn your office tour into a scavenger hunt so they can get to know the rest of the company. Create a list of clues, involve other teammates, and give a prize to the winner.

EARN YOUR EARS

Disney enrolls every new hire in a class called "Traditions," complete with its very own graduation ceremony. The goal of the program is to explore the company's heritage so people can feel like they're a part of something special right from the start. Once they ace the class, graduates earn a pair of Mickey Mouse ears to symbolize their new employee status.

MAKE IT A TEAM EFFORT

What's the secret ingredient for making someone feel like they're part of a team? Teammates. When an employee first joins, pair them with two people: a mentor and a buddy. A mentor is their pal to help with personal and career growth, while a buddy is their go-to for all the other stuff that comes up when starting a new job. Where's the quietest conference room? What's the best snack in the snack closet? An insider's perspective will help your employee feel at ease way sooner.

At the end of the onboarding phase, ask your new hire how it went. You can do this through a casual check-in or a full-blown survey that touches on each point. The more people who provide feedback, the better your program will become.

02

All about recruitment

Your 2016 recruiting to-dos

First, it's important to understand what's going on in the CPA labor market. Many accounting firm partners have unrealistic expectations about what it takes to hire high performers. It's not as simple as posting a job and praying that an all-star applies. That's why we're here to explain.

THE RACE FOR TALENT IS OVER

There are more college students majoring in accounting than ever before. That's great and all, but the number of people sitting for the CPA exam has declined to 2006 levels and is trending downward. This leaves us with a candidate market shaped like an hourglass — lots of baby boomers and leaders at the top, lots of college students at the bottom, and a skinny middle market of “lateral” hires: people who are two to seven years out of college and are now seniors and managers. Making matters worse, many of those with experience leave for private industry jobs, which tend to offer a 20-30 percent pay bump.

But you probably already knew all of this.

What you may not know is that firms of all sizes are making great college and experienced hires. These firms recognize that the recruiting strategies of the past do not work anymore. They know that you first have to create a great place to work, build a strong employer brand by articulating why your firm is so great, and then distribute that message in the ways young CPAs digest information.

PRO TIP

In 2015, AICPA PCPS member firms (from two partners up to the largest firms), all listed “finding qualified talent” as the #1 issue facing their firm.

Lateral hiring checklists: How to attract top experienced talent

Part of having a successful 2016 means revamping your organization so that you can attract the right talent, and then communicating your “recruitment brand” directly to job seekers. To do this right, you have to use new channels. Here’s a four-step primer on what you can do now, and where you can go for help.

Make sure your firm is upgraded to attract and retain top talent

Pay top dollar for lateral talent

Basically, you have to remain competitive compared to other public accounting firms. Don't bother measuring your salaries against those in private industry, because those jobs tend to pay way more for people with equivalent experience. And remember, while paying top dollar is a must, it's not the only thing you need to lure a great hire. Job seekers also value firms that are purpose-driven and have great cultures — competitive compensation is simply a prerequisite.

Be patient (and tell your partners to be patient)

It takes months and months to land a lateral hire, so get started early and have some patience. Even better, recruit online all year long because you never know when a high performer is looking for a new job. Being proactive lets you build a pipeline of great talent.

Respond Quickly

This is non-negotiable. Respond to applicants within hours of receiving their application for the best chance of setting up a screening interview.

Offer flexibility, a clear career path, and deliver on the sales pitch

High performers expect you to trust them to get the job done. They want the flexibility to work out of the office and take care of personal errands without asking for permission. They also want a clear understanding of what they must accomplish in order to get promoted. Plus, they remember the perks you sold them during recruitment, so if the pitch doesn't match the product, they won't stick around for long.

Onboard well

Integrate new hires into the social fabric of your existing team and set expectations early on. These two points are crucial to retention.

Understand your Millennial audience

Looking for an accountant with two to seven years of experience? They're most likely Millennials. This age group values flexibility, work-life balance, and organizational culture. They want to know your firm's values, and they must see that the sales pitch matches the real behaviors in the firm. Yes, they play by a different set of rules that got you to partner, however, give them a great place to work and they will transform your organization.

"I'll get my work done. But it might be that I come in on a Saturday or stay late another night. Flexibility, not favor, is what I ask for."

JACQUELINE REYES • 2015
GRADUATE OF UNIVERSITY
OF MARYLAND, STAFF
ASSOCIATE, EY

Prepare your employer brand for recruitment communications

Articulate what makes your firm unique — your employment brand. Remember those culture questions you answered earlier? Here are five additional questions you need to think about in order to attract the accountants you want to work with — and keep the ones you don't at bay. These questions are based on survey responses of high performers who were asked what they wanted to learn about a potential employer.

Jot down the thoughts that come to mind as you read these questions:

1. Why work at a firm of our size?

2. Why should anyone trust their career to our firm?

3. What will the future look like if you're effective?

Spread the word

- First and foremost, candidates need to find you. After that, it's up to your brand to convert them from casual browsers to serious applicants.
- Align your website, job posting, and even your interview talking points based on the five questions above. Your communication should be consistent with every candidate interaction.
- Now, distribute that message through channels that Millennials use to consume information. This means webinars, blogs, videos, social media, and more. Get started with social media and build an audience there. If you don't have in-house marketing teams you can outsource all of this. It's important to understand that your target audience prefers to learn about prospective employers through great content.

- Participate in FREE nationwide, virtual career fairs like [Meet the Firms Week](#), [shameless plug alert], and [Advance Virtual Career Fair for CPAs](#).
- Use job boards and online recruitment tools that tell your story to large audiences, like [Accountingfly](#) or [LinkedIn](#).

Have a simple yet effective recruitment process to increase efficiency

Attracting great applicants isn't enough. You need a process that allows you to respond quickly to interested candidates, make fast decisions, and build talent pools for future hiring needs. There are products that offer this, like Accountingfly's free [Applicant Tracking System](#), [SmartRecruiters](#), or [iCims](#). Even if you use your inbox and a spreadsheet, implement a process where all candidates go into the same place so you can save them for the future.

Alright, we need to bring this in for a landing. Remember to reset your own expectations — we're in the middle of a talent crisis and recruiting is very difficult, but very possible. Start early, recruit all year, and invest in building a great employer brand to attract star performers.

Tips by firm size

By now you've seen the major action items you need to do across all sizes of accounting firms. So what specific steps should your firm take next? Here's our advice:

TIPS FOR SOLE PROPRIETORS

- Get on Twitter and LinkedIn, at a minimum, and add Facebook for extra points. How can you handle all of this? Outsource the recurring posts to a local social

media company, but just be sure to answer those five questions first.

- If you're looking to hire a successor, be upfront about that; you want to attract entrepreneurial-minded candidates who are looking for an opportunity to move into ownership, which is a great perk of working in a small firm.

TIPS FOR LOCAL AND MID-SIZED FIRMS

- Click out of your Excel spreadsheet and move your recruitment process online with an Applicant Tracking System (ATS). Place all your college recruiting and experienced candidates into the ATS so you can build a pipeline of future talent. Look at you — now you're the headhunter!
- Invest in upgraded branding with a well-designed website and active social media profiles. Need some backup? Tell your partners that a strong employment brand reduces cost per hire by 50 percent.

TIPS FOR LARGE FIRMS

- Recruit every single day. To get a steady stream of candidates, you should always be hiring. Answer the five questions, redefine your brand, and get your firm on the internet. You need to use every tool in your toolkit.
- Remind partners to be patient — it takes time to hire experienced CPAs. However, being proactive and starting early is key.

Knowing your audience: Recruiting Millennial accountants

Campus Recruiting: How to attract the next generation of leadership

A recent Accountingfly poll of 200 students and young CPAs asked what was the most important factor while selecting an employer. The results may surprise you:



"I'm looking for the next 'me.' A student with big leadership potential, who can work, and who has the vision to one day lead our organization."

MANAGING PARTNER OF
A SMALL FIRM

Going to a campus career fair isn't enough

Student recruiting has changed dramatically in the past few years. In order to find the best students for your internships and entry-level positions, you need to go where they go. Here are three strategies to help you do just that in 2016:

- **Be selective about the schools you visit**

Find out which ones send students to the Big 4 and national firms, and which ones tend to place more people in mid-market or local firms. Being selective about campus visits will allow you to invest more time in the ones that matter to you. Delve deeper by volunteering to teach case studies, reviewing resumes, and presenting at club meetings. As you build relationships with the staff and professors, they will naturally start to refer candidates your way.

Should you attend Meet the Firms nights at your core schools? Definitely. Just remember to take the extra steps needed to build name recognition and relationships with professors.

- **Cast a wider net by going online**

Visit fewer local schools, and instead, let students from across the country find you directly. You can do this by hosting free online events, like Accountingfly's Meet the Firms Week. This is a great way for students to discover you without incurring a cost.

- **Sell the size of your firm**

As the quote to the right suggests, it's important to remember that many students are unaware of the benefits of working in a smaller firm. To clear up that misconception, start by selling your firm size. Students are fully aware of the Big 4 and most national firms, so if your firm falls outside of that size, you must articulate why it's still a great place to launch a career. Put this information in your job postings, on your website, and of course, talk about it during interviews.

- **Use your campus recruiting program to build pools of talent**

Every resume — from those you hire and those you don't — should go into an Applicant Tracking System (ATS) database so that you can keep track of people for opportunities down the line. Today's college seniors will be Senior Associates in a couple of years, so keep in touch with this incredible pipeline of talent. Check out the resources section for more details.

- **Ask great questions**

We've listed some of our favorite interview questions right here for you to use.

Case Study: How one firm made 4 critical hires in 6 weeks

Pershing Yoakley & Associates is a national leader in providing professional services to the health care industry. They are a multi-office firm based in the Southeast and like most practices, they're working hard to attract scarce lateral talent. They rely on job boards, headhunters, and Accountingfly to deliver leads to hire.

In the summer of 2015, PYA hired three lateral CPAs and one entry-level staff member across three offices — in just six weeks. We spoke to Mouzhan Mangum, PYA's Director of Talent Acquisition, to learn how in the world they did it.

RECRUIT. ALL. THE. TIME.

PYA doesn't adhere to the "post and pray" approach. They will talk to great talent when they apply or are contacted, even if the firm doesn't have a job posted that fits. Why's that? The accounting profession is short on high-performing talent, so PYA never wastes an opportunity. They also leverage quality content, like this recruitment video, cross-post their openings and target accountants on some of the largest online job boards, have a fresh career website with testimonials and current opportunities clearly listed, and finally, they use a great Applicant Tracking System (ATS) that intakes recruits quickly.

"We embrace the philosophy of trying new avenues to get in front of candidates," Mangum says. "And we see it very clearly: great branding and content is what's delivering great talent. We've recorded a recruitment video about our culture, participated in location-targeted webinars and have even received assistance in writing compelling internet-ready job postings. The resources are out there, and they're paying off big time! We are seeing a strong quality of job seeker we haven't seen before and we're making hires during a time when it is very difficult to hire experienced staff," she continued.

BE OPEN MINDED

PYA gives serious consideration to non-traditional candidates, such as international folks, private to public transfers, and those who are starting a second career in accounting. And they've had great success in many areas of business by making "outside the box" hires. "You'd be amazed at how much larger your talent pool becomes when things such as cultural fit and soft skills are given weight," says Mangum. "A lot of resumes come across my desk that don't meet every technical requirement for a job. I always have my eye out for candidates who are competent, clearly take initiative, and exhibit solid people skills."

RESPOND FAST

Most candidates on the market find new work quickly — especially the top ones. PYA responds almost immediately to applicants because a fresh lead is like a perishable good. Do not delay; if a strong candidate shows interest, engage them before they move onto another opportunity. "We found that in this market, firms should engage interested candidates within hours of their application or expression of interest," says Mangum.

BUILD A PROCESS

PYA uses an ATS to manage leads, respond quickly, get candidates in for interviews, organize paperwork, and make fast decisions. Mangum adds, "Establishing a process is key; otherwise things fall through the cracks. Using an ATS has made our recruitment and hiring process efficient and organized." The secondary benefit to automating the recruitment process is that you build talent pools for the future. A great ATS and process gets all decisionmakers on the same page, speeds up those decisions, and gives you a talent pool for future hires.

KNOW WHO YOU ARE

PYA knows who they are and who they want. They're also upfront about their culture, values, and mission, which really resonates

with job seekers. “We work those items into every job posting, our company profile, and every other communication possible,” says Mangum. “Our concerted effort of having a clear message, and delivering that message in the ways that CPAs like to receive career information has made it possible for us to quickly generate applicants and make great hires.”

Recommended tools

Ready to get started? Level up your accounting recruitment efforts with the following tools.

SOURCING APPLICANTS

- **Accountingfly**: Known as the career center for the accounting profession, thousands of professionals search Accountingfly for job opportunities each month. Options range from monthly job postings to recruitment branding campaigns for employers of all sizes. All job postings are also cross-posted on other key sites like Indeed.
- **LinkedIn**: This site is the largest online professional networking site, which enables you to post monthly job openings and set up recruitment campaigns.

APPLICANT TRACKING SYSTEMS

- **iCims**: Powerful, low-cost ATS
- **Taleo**: Full-service ATS for enterprise customers
- **SmartRecruiters**: Open and configurable talent acquisition platform
- **Accountingfly**: Offers a free ATS to accounting firms to organize candidates and build talent pools for the future. Also offers resume importing services.

03



Resources

All the tiny details that make up the hiring process can add up to quite a lot to do. So we created a handy little section that will help you out at each turn, from writing the job post all the way to onboarding. Tear it out, scribble away, and save your precious time.



INTERVIEW QUESTIONS

ACCOUNTING-SPECIFIC

1. Why accounting? Why did you decide to go into the field?
2. What are some characteristics that a good accountant has?
3. What are some ways you make sure your work is precise?
4. What are some of your favorite accounting resources? Blogs, books, etc.
5. What tools do you like to work with?
6. What is goodwill?
7. What is a cash flow statement?
8. Have you ever worked with a client who was audited? Walk me through the process.

GENERAL

1. Why are you interested in our firm?
2. Tell me about a project you're really proud of. What made it successful?
3. Tell me about a tension you had at work. How did you resolve it?
4. Tell me about a time you failed. What happened and what did you learn from the experience?
5. If you were on the cover of a magazine, which one would it be? What would the headline say?
6. What are three words people would use to describe you?
7. What kind of culture are you looking for?
8. How do you like to communicate?
9. What's something you want us to know that's not on your resume?

Onboarding doc template



BEFORE THEY ARRIVE

- Send your new hire a personalized welcome gift. For physical gifts, you can use a flower delivery service like [BloomThat](#), and for virtual gifts, check out [Giftly](#).
- Introduce them to two important insiders:
 1. A buddy to show them around
 2. A mentor to help with their development.
- Set up their equipment so they can get started right away.
PRO TIP: Have them completely design their own setup.
- Set up their email address.
- Decorate their desk to make them feel welcome. Add a balloon or some other marker indicating they're new, so people will be more likely to stop by and introduce themselves.
- Tell them what they should bring to fill out their [I-9](#) and [W-4](#) forms.
- Order a T-shirt, hoodie, or other company apparel, so they feel like they're already a part of the team when they start.
- Email them explaining what to expect on the first day.
- Lay out any details they may find useful, like your firm's address, and the parking and public transportation options.
- Email the team introducing your new hire.

Onboarding doc template



FIRST DAY

- Make non-stop introductions
- Give an office tour and explain how to use relevant equipment. Point out bathrooms, conference rooms, the kitchen, and other key areas.
- Take your new hire out to lunch
- Give them building keys and access cards
- Walk them through any new hire paperwork
- Make a copy of documentation needed for your records:
Driver's license, passport, Social Security card, etc.
- Have them sign the employee handbook

FIRST FEW WEEKS

- Schedule weekly check-ins to see how things are going
- Encourage their mentor and buddy to set up regular get-togethers
- Work with them on setting goals for their first few months

Offer letter template



Subject: Will you join us?

Dear [_____],

Drumroll please... On behalf of everyone at [_____], we're delighted to offer you the role of [_____]! After getting to know you over these past few [days/weeks/months], it became clear that your talents, goals, and values are a perfect match for our team. It's such an honor to bring you on board as we work toward [Describe a little bit about your mission].

As our new [_____], you will be working alongside [_____] to [Describe the goal of your team]. Here are some of the things you'll get to do on a daily basis: [List out a few of the main duties].

Now, the details: Your starting salary will be [_____] per year, which you will be paid every [_____]. This amount is subject to any deductions and tax withholdings required by law. The role is [exempt/non-exempt] [and employment is on an at-will basis]. [Describe any extra compensation, like stock options].

As a [full-time/part-time] employee, you will be entitled to [_____] days of paid vacation in addition to [_____] days of sick leave. You'll also have the option to enroll in our company benefits program, which includes [List out benefits].

We'd love to answer any questions you might have about this offer. We're aiming for a start date of [_____], and it would be great to hear back from you by [_____]. If this time frame doesn't work for you, just let us know.

We're oh-so-excited to welcome you as our newest [Team nickname for employee]! So the real question is, can we order your [laptop/name plaque/team jacket] yet? ;)

Cheers,

[_____]

Job posting template

Name of position: _____

Type: Full-time, Part-time, Internship, Entry-level

Location: City, State

Description:

Introduce your firm, culture, and what you believe in. Has your firm done something truly outstanding? Won any awards? Tell the world what your small but mighty team is up to. Then, explain how this particular position brings you closer to reaching that mission.

Make sure your description also covers the following points:

- What is the goal of the role?
- What will this person be doing on a daily basis?
- Who will they be working with? What is the team structure?
- Who will they report to?
- What are the opportunities for growth?

Requirements:

Be explicit about years of experience, education, and skills you're looking for in the role. Break out your qualifications into two categories:

- **Must-Haves:** Are the essentials, like internships, work experience, or a degree from a particular program.
- **Nice-to-Haves:** Are qualities that would take the applicant to the next level, like knowledge of a certain software program or experience working with a specific client.

Instructions:

How should the applicant apply? Write out any specific instructions, and if you want them to provide additional materials along with the application, like a portfolio, writing sample, or something else. Also, include a link to your website or careers page if the posting isn't hosted there.

Now, take a stab at writing your job description. Here's a space for you to try some things out:



A large, empty gray rectangular area intended for writing a job description.

04



What now?

First off, thanks for reading! We hope you walk away with new recruiting strategies and a more holistic understanding of the accounting landscape so you can set up your firm for success.

Here are even more ways you can help out your accounting firm in 2016 and beyond:



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GET 10% OFF ACCOUNTINGFLY IN 2016

From now until January 31st, 2016, receive a 10 percent discount on Accountingfly's Firm Partner program, along with unlimited job postings and recruitment marketing to attract high performers to your firm. [Set up a meeting](#) with a Hiring Advocate to discuss how we can help or [click here](#) to learn more.

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Accountingfly is the career center to the accounting profession, offering the most relevant job opportunities at the very best employers. Employers use Accountingfly to hire interns, early career, and experienced accountants. Candidates create profiles to search for and apply to jobs, and have the option of making their profile private or visible to recruiters. Along the way, Accountingfly provides support and resources to accounting employers to help them build incredible teams.

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GUSTO

Gusto takes the pain out of payroll by automating what is often a complicated and stressful task for businesses, and making the process simple and delightful. Now, Gusto offers compliance and benefits, fully integrated with payroll. Gusto is proud to partner with thousands of accountants to help businesses across the country seamlessly manage their payroll, so they can get back to doing what they love.

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