



Module 1: Foundations of Growth

ASSEMBLING THE RIGHT ACCOUNTING TEAM

0207-100-8788

www.sameraglobal.com





Assembling the Right Team

Introduction:

Welcome to the "Assembling the Right Team" Workbook, a vital resource designed specifically for accountancy firms looking to strengthen their team dynamics. Building a proficient and cohesive team is essential for delivering exceptional service and driving your firm's success. This workbook is your guide to identifying the skills and roles your firm needs, sourcing the right talent, and fostering a productive and harmonious work environment. By carefully evaluating and assembling your team, you'll be setting your firm on a path of growth, efficiency, and heightened client satisfaction.

Instructions on How to Use the Template:

- **Reflect on Your Firm's Needs:** Begin by considering the current state of your team. Think about the services your firm excels in and where you could improve. Identify the gaps in skills or roles that need filling to elevate your firm's capabilities.
- **Identifying Team Needs:** This section helps you define the specific skills and roles required for your firm's services. Consider not just the technical skills but also the soft skills that would complement your firm's culture.
- **Sourcing Talent:** Here, you'll explore different channels for finding the right candidates. Think about both traditional and innovative sourcing methods.
- **Candidate Evaluation:** Use this part of the workbook to establish criteria for evaluating potential team members. This includes devising interview questions and understanding what to look for during the recruitment process.
- **Think Critically:** As you progress through the workbook, it's crucial to think beyond the surface. Assess not only how candidates fit the job description but also how they align with your firm's culture and long-term objectives.
- **Implement and Review:** Once you've assembled your team, use the onboarding and development sections to integrate and grow your team effectively. Remember, team building is an ongoing process. Regularly revisit this workbook to adjust your strategies as your firm evolves.
- **Use Your Insights:** Apply the insights gained from this exercise to refine your recruitment, onboarding, and team development processes. The goal is to create a stable, motivated, and skilled team that propels your firm forward.
- **Review Regularly:** The landscape of talent and team dynamics is ever-changing. Regularly update your approach using this workbook to ensure your team remains aligned with your firm's evolving needs and industry trends.

[Join the Unstoppable Newsletter for more updates, tips and content to learn how to start, build and scale your accountancy firm.](#)





Section 1: Identifying Team Needs

Objective:

Create a detailed list of services your firm offers. Next to each service, identify the key roles required and the specific skills associated with those roles.

Example:

Service: Audit Services

Role: Audit Manager

Required Skills: Deep understanding of audit standards, strong leadership, effective communication.

Service	Role	Required Skills



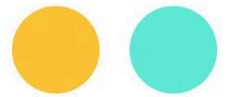
**Objective:**

Evaluate your current team structure. Create a table to map your current or required team members against the identified roles and skills from Task 1, noting any gaps or overlaps.

Example: Compare the existing team's skills with the requirements for the role of Audit Manager to identify gaps in leadership or technical expertise.

Team member/Role	Required Skills	Skill Gap & opportunities





Section 2: Sourcing Talent

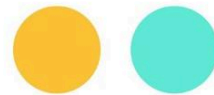
Objective:

For each role identified in Section 1, develop a sourcing strategy. List at least two different sourcing channels, explaining their suitability for the role.

Example: Role: Junior Accountant; Channels: University career fairs (for fresh talent), LinkedIn (for candidates with some experience).

Role	Channel

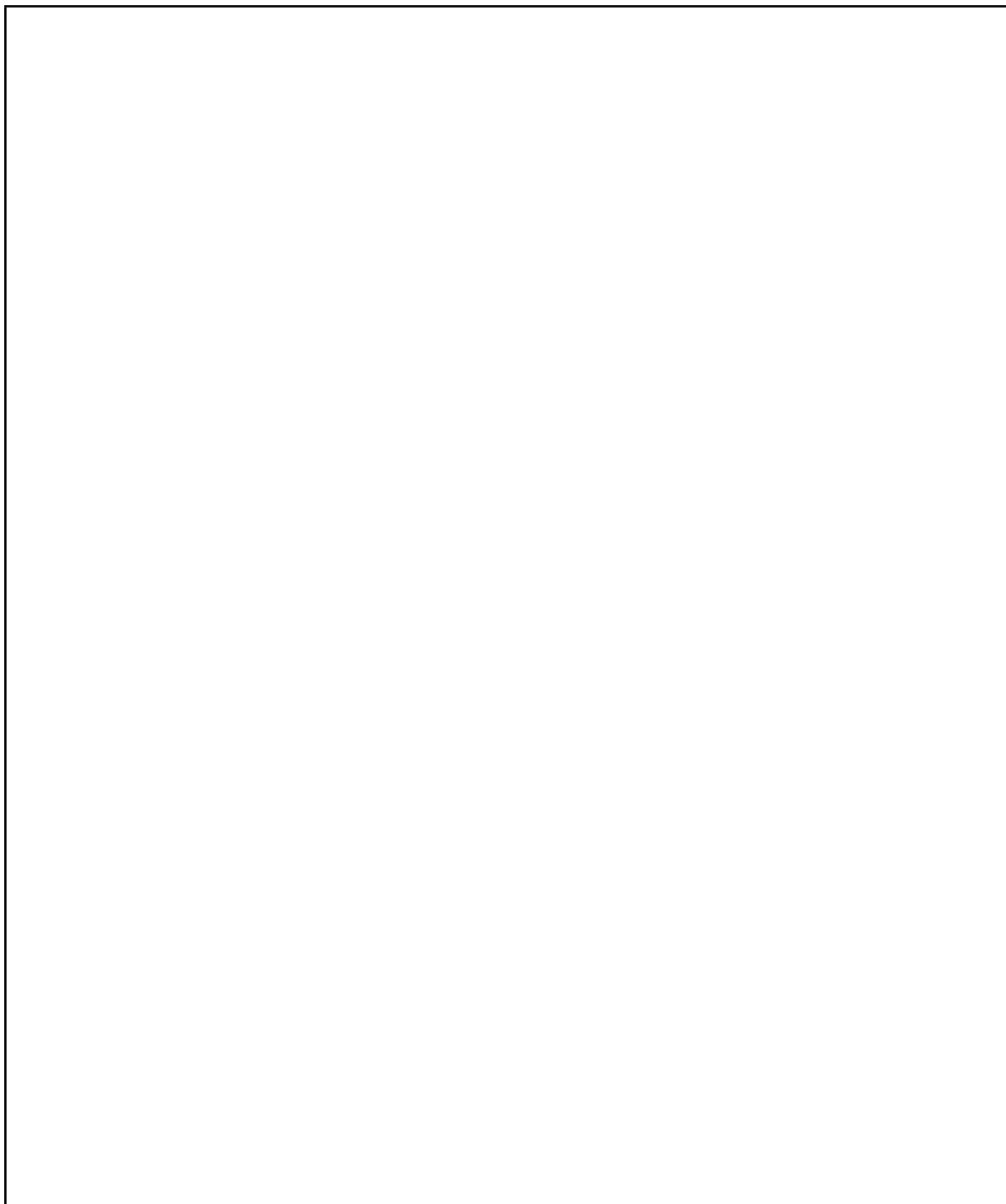


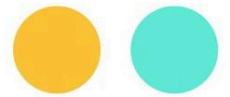


Objective:

Design a template for a job posting for one of the key roles. Include essential qualifications, desired skills, and role responsibilities.

Example: Create a compelling job description for a Tax Specialist, highlighting qualifications like CPA certification and skills like analytical thinking.





Section 3: Candidate Evaluation

Objective: Create a comprehensive list of criteria to evaluate candidates for each role identified in Section 1.

Instructions:

- For each role, list essential technical skills (e.g., expertise in specific accounting software, knowledge of tax law).
- Include soft skills (e.g., communication, teamwork, problem-solving ability).
- Consider cultural fit factors – qualities that align with your firm's values and work environment.

Example: For a Senior Auditor role, criteria might include detailed knowledge of auditing standards, strong analytical skills, ability to lead a team, and alignment with the firm's commitment to ethical practices.





Objective:

Create an evaluation sheet that can be used to consistently assess candidates during the interview process.

Instructions:

- Use the criteria established in Task 1 to create sections in the evaluation sheet. Each section should correspond to a key skill or quality.
- Include a scoring system (e.g., 1-5 scale) to rate candidates on each criterion.
- Provide space for additional notes, such as specific impressions or relevant comments made by the candidate.

Example: The evaluation sheet for a Tax Consultant might have sections for 'Technical Tax Knowledge', 'Client Communication Skills', 'Adaptability', with a 1-5 rating scale for each, and an additional section for notes on the candidate's responses to situational questions.

Skills	Ranking	Notes





Section 4: The Interview Process

Structuring the Interview

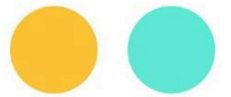
Objective: Develop a clear structure for the interview process to ensure a comprehensive evaluation of each candidate.

Instructions:

- Opening: Designate the first 5 minutes for introductions and explaining the interview format.
- Technical Skills Assessment: Allocate 15-20 minutes to explore the candidate's technical knowledge and experience. Prepare specific questions related to key skills required for the role.
- Soft Skills and Cultural Fit: Use 10-15 minutes to assess soft skills and how the candidate would fit within your firm's culture. Include scenario-based questions.
- Candidate's Questions: Reserve 10 minutes at the end for candidates to ask their questions.
- Conclusion: Spend the final 5 minutes outlining the next steps in the recruitment process.

Example: For an interview with a potential Accounting Manager, include questions about managing teams, handling tight deadlines, and their approach to client relationship management.





Interview questions continued.





Creating an Interviewer's Guide

Objective: Provide your interviewers with a guide that ensures consistency and comprehensiveness in the interview process.

Instructions:

- **Pre-Interview Preparation:** Outline steps for interviewers to prepare, including reviewing the candidate's resume, the job description, and the evaluation criteria.
- **Conducting the Interview:** Offer guidelines on conducting the interview, including tips on creating a welcoming environment, active listening, and taking notes.
- **Post-Interview Protocol:** Detail the steps to be taken after the interview, such as completing the evaluation sheet, discussing the candidate with other interviewers, and considering the next steps.

Example: In the guide, include reminders to avoid unconscious biases, to ask open-ended questions, and to provide candidates with clear, concise information about the role and the firm.

Pre-Interview Preparation:





Conducting the Interview:

Post-Interview Protocol:

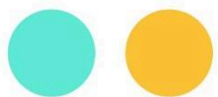
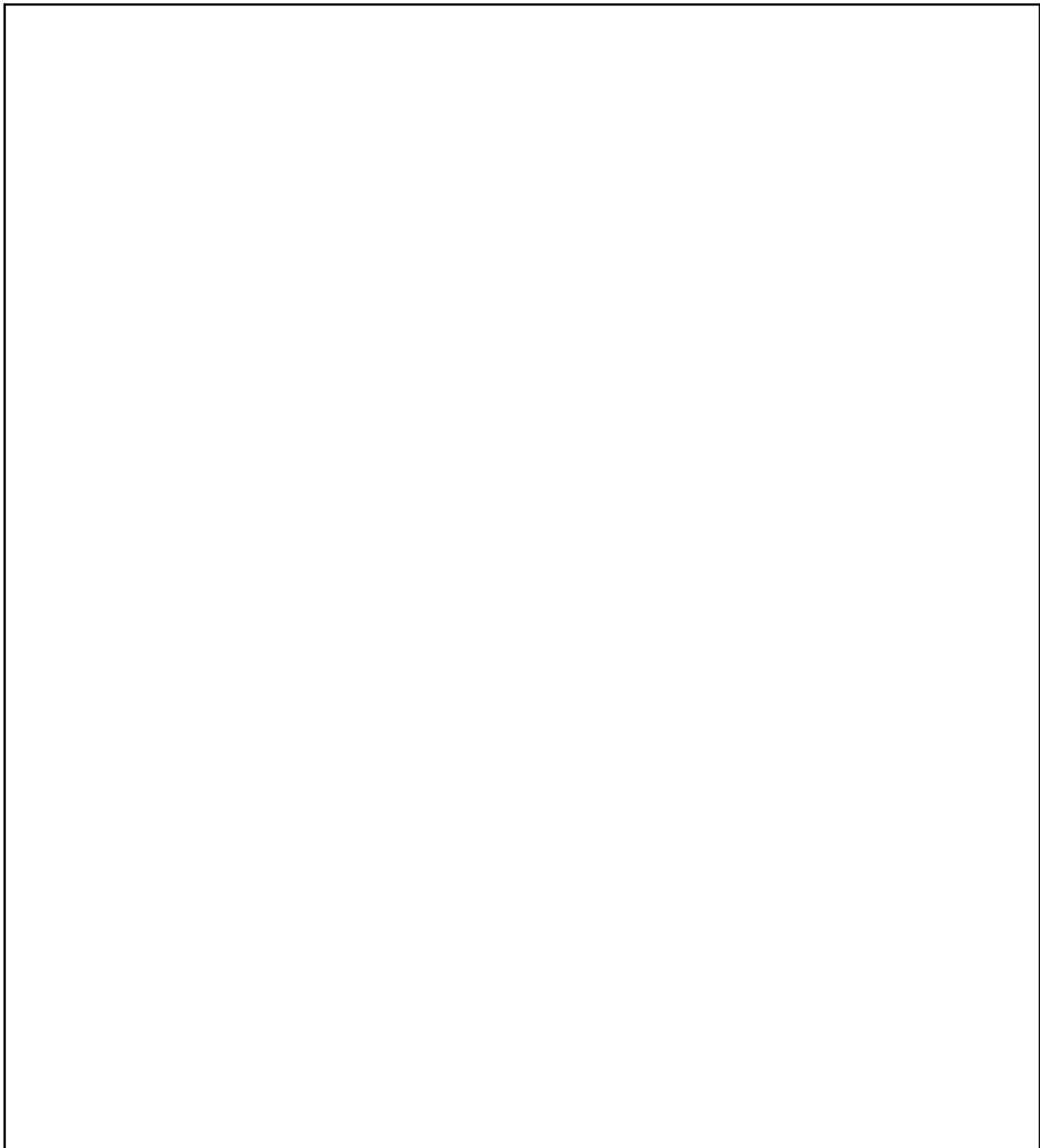




Section 5: Onboarding New Team Members

Objective: Design a comprehensive onboarding plan for the first month, detailing key activities, training sessions, and meetings with team members.

Example: Plan activities like orientation, software training, shadowing sessions with experienced team members, workstation setup, HR documentation, introduction to key clients, and first-month review meeting.

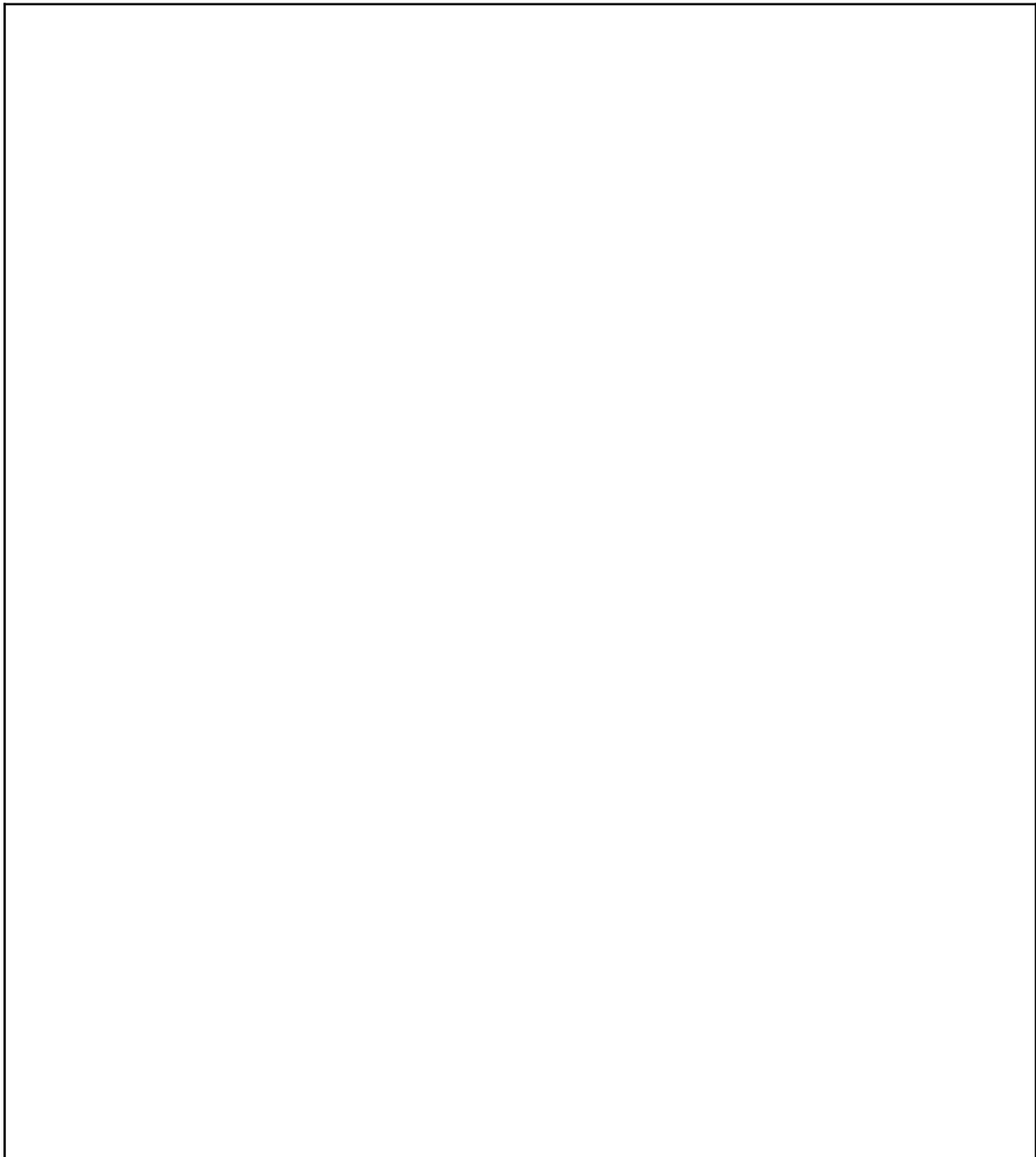


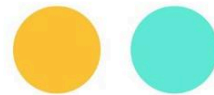


Section 6: Team Development and Retention

Objective: Design a template for individual development plans for team members, focusing on career progression, skill enhancement, and personal growth goals.

Example: Outline a plan including goals like leadership training for a mid-level accountant aspiring to a managerial role.





Objective: Create a retention strategy plan. Include initiatives like regular performance reviews, mentorship programs, and team engagement activities.

Example: Plan quarterly team-building exercises and bi-annual career development meetings for each team member.





Congratulations on Completing Your Team Assembly Workbook! Here's How to Proceed:

Reflect on Key Learnings:

- Revisit the insights and observations you've noted throughout this workbook. What did you discover about your firm's current team dynamics and future needs?
- Highlight the most critical findings that will impact your team-building and development strategies.

Develop Actionable Steps:

- Utilize the information you've gathered to outline specific actions. For instance, if you identified a need for more expertise in financial technology, plan how you might recruit or train team members in this area.
- Set clear, achievable goals and timelines for implementing these steps, ensuring they contribute effectively to your team's enhancement.

Incorporate into Your Team Development Plan:

- Integrate your findings from this workbook into a broader team development plan. Align your strategies with the skills, roles, and cultural aspects you've identified as crucial.
- Be prepared to adjust your management or operational approach based on your enhanced understanding of your team's composition and capabilities.

Engage with Your Team:

- Share the outcomes and planned actions with your team. Their engagement, feedback, and participation are essential for successful implementation.
- Foster an environment of open dialogue to refine your approaches and encourage team members to contribute to the firm's growth.

Regularly Review and Update:

- The needs of your firm and the dynamics of your team will evolve. Regularly revisit this workbook to ensure your team structure remains aligned with your firm's objectives.
- Treat this workbook as a dynamic component of your management strategy, adapting as new challenges and opportunities arise in your firm.

Final Thoughts:

Remember, the insights and plans you've developed here are instrumental in driving your firm's success. This workbook is your first step towards creating a team that is not just skilled but also motivated, cohesive, and aligned with your vision. Use these insights judiciously, and you'll pave the way for a team that is fully equipped to meet the challenges and opportunities ahead.





Additional Notes

Please use this section to fill in the most important points and any other notes or ideas you have about your Growth Action Plan

Copyright © 2023 Samera Global

All rights reserved. No part of this publication may be reproduced, distributed, or transmitted in any form or by any means, including photocopying, recording, or other electronic or mechanical methods, without the prior written permission of Samera Global, except in the case of brief quotations embodied in critical reviews and certain other noncommercial uses permitted by copyright law. For permission requests, write to Samera Global, addressed "Attention: Permissions Coordinator," at the address below.

Samera Global

Disclaimer: This workbook is intended for educational and informational purposes only. The contents are not intended to offer professional legal, financial, or business advice. All scenarios and examples are illustrative and should not be considered as applicable to all situations. Samera Global does not accept any responsibility for any loss which may arise from reliance on information contained in this workbook.

