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**Starting Your Own Virtual Accounting Business: Staffing & Procedures**

* **Building Your Virtual Team**
  + Contract out basic data entry
  + Hire a PT Accounting Manager or Review Accountant to Mentor/Promote to Manager
  + Work with Manager to Build Team to include:
    - Data Entry
    - Staff/Review Accountants
    - Payroll Manager & Payroll Accountant
    - Admin Assistant
* **Build STAFFING Systems, Checklists & Procedures**
  + Recruiting/Interviewing/Hiring Checklist
  + Employee Termination Checklist
  + Employee/Corporate Handbook
  + New Employee Training Checklist on Systems, Cloud Based Technologies, and Internal Polices & Procedures
  + New Employee Training Checklist on Client Work
  + Regular Performance Reviews Scheduled w/ Pay Review
  + Continued Training and Development Scheduled for Staff
  + Scheduled Cross-training amongst employees for client work/coverage
  + Monthly Data Entry & Review Accountant Efficiency
* **Build OWNER/MANAGEMENT Systems, Checklists, & Procedures**
  + Profitability Benchmarks for Clients and Regular Review
  + Lead and Proposal Templates for Potential Clients
  + Organizational Chart
  + Staff Work Schedule
  + Master Log-In / Credential List
  + Master Client List / Information
  + AR & AP Policies
* **Build CLIENT MANAGEMENT Systems, Checklists & Procedures**
  + Policy and Checklist for Leads/Potential Clients
  + New Client Implementation
  + Updated Client-Bookkeeper-Data Entry Assignments
  + Management of HelpFiles & Client Documentation
  + Month-End Checklist
  + Payroll Checklists for Processing, Quarterlies, Annual, 1099s…
  + Year-End Close Checklist and Communication w/ External Tax CPA
  + Client Cancellation Checklist
  + Client Changes Checklist (Fee Change, New C9 Seat QB Access change)
  + Monthly Procedure to Review Company Profitability for each Client
  + Annual Fee Review for each client