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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