Personalized Training

Personalized Training

- Personalized Training = Prepared Training

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- System Access

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Personalized Training

- Personalized Training = Prepared Training
- System Access
- Set the Financial Scene

3 Reports to Hand Over to Your Accounting Professional

BALANCE SHEET

PROFIT & LOSS STATEMENT

CASH FLOW STATEMENT

Personalized Training

- Personalized Training = Prepared Training
- System Access
- Set the Financial Scene
- Set Aside Time

Clear Expectations

Clear Expectations

- Clear is Kind

Clear Expectations

- Clear is Kind
- Explain the *WHY* Behind the *WHAT*

Clear Expectations

- Clear is Kind
- Explain the *WHY* Behind the *WHAT*
- The Importance of 1:1 Meetings

Clear Expectations

- Clear is Kind
- Explain the *WHY* Behind the *WHAT*
- The Importance of 1:1 Meetings
- Feedback and Evaluation

A Few Things to Remember:

- Build relational capital.
- Be transparent.
- Lead with curiosity.
- Talk about the problem, not the person.

Set Clear Expectation & Guidelines

AVAILABILITY

PRODUCTIVITY

MEETINGS

SUPPORT

Technology & Tools Training

Technology & Tools Training

- Tools and Systems

Technology & Tools Training

- Tools and Systems
- Financial Planning Systems

Technology & Tools Training

- Tools and Systems
- Financial Planning Systems
- Communication

Performance Metrics

Performance Metrics

- Establish Performance Metrics

Performance Metrics

- Establish Performance Metrics
- Set Goals

Performance Metrics

- Establish Performance Metrics
- Set Goals
- Share Performance Metrics That Matter to You

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∞ BELAY

∞ BELAY   Bookkeeping Client Guidebook

COMPANY INFORMATION

Primary Business Name _____

Primary Business Website _____

Primary Time Zone _____

Billing
Address _____

                (Street)   (City)   (State)   (Zip Code)

Physical
Address _____

                (Street)   (City)   (State)   (Zip Code)

MAIN POINT OF CONTACT INFORMATION

Client Name _____   Birthday _____

          (First Name)   (Last Name)   Anniversary _____

What is the leader's personality type
(Enneagram, Myers Briggs, PI, DISC, etc.): _____

Leadership style _____

Favorite sports/hobbies _____

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