

# ***NEW HIRES, NEW HEIGHTS***

**A COMPREHENSIVE GUIDE TO ELEVATED ONBOARDING  
FOR YOUR ACCOUNTING PROFESSIONAL**



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Director of Accounting Services



# Personalized Training



# Personalized Training

- Personalized Training  
= Prepared Training

# Personalized Training

- Personalized Training  
= Prepared Training
- System Access



# 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



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- Clear is Kind



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- Explain the *WHY* Behind the *WHAT*

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- 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

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- Tools and Systems
- Financial Planning Systems

# Technology & Tools Training

- Tools and Systems
- Financial Planning Systems
- Communication

# Performance Metrics

The image features a scenic mountain landscape with snow-covered peaks and a clear blue sky. The scene is overlaid with a semi-transparent teal gradient that is darker on the left and fades into a lighter blue on the right. In the foreground, there are rocky, snow-dusted mountain ridges. In the background, more snow-capped mountain ranges are visible under a bright, clear sky. The overall aesthetic is clean and modern, suitable for a professional presentation or report.

# 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

# DOWNLOAD TODAY'S RESOURCES



 BELAY Bookkeeping Client Guidebook

**COMPANY INFORMATION**

Primary Business Name \_\_\_\_\_

Primary Business Website \_\_\_\_\_

Company Time Zone \_\_\_\_\_

Billing Address \_\_\_\_\_

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

Physical Address \_\_\_\_\_

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

**MAIN POINT OF CONTACT INFORMATION**

Client Name \_\_\_\_\_

(First Name) (Last Name) Birthday \_\_\_\_\_

Anniversary \_\_\_\_\_

What is the leader's personality type (Enneagram, Myers Briggs, FI, DISC, etc.) \_\_\_\_\_

Leadership style \_\_\_\_\_

Favorite sports/hobbies \_\_\_\_\_

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