

BY MELANIE HODGDON

## Hiring a Bookkeeper

**Not long ago, a client and I were discussing** his search for a bookkeeper for his company. He had considered his accountant (whom we eliminated because he was expensive and tax-preparation oriented and because he lacked knowledge about the special accounting needs of a contractor) and a friend who was trustworthy but lacked the discipline and temperament to be consistent and precise when entering data.

This client uses QuickBooks for his accounting, and his next (and logical) impulse was to look for a QuickBooks expert. Since I am a QuickBooks consultant, my warning against doing this might have seemed counterintuitive. But here's the reasoning, which applies to hiring *any* employee for any position: Unless the candidate is well-versed in carrying out tasks in a way that's appropriate for your type of company, the person's experience may not serve your best interests.

For example, a candidate may have 15 years of experience in QuickBooks, but that experience may have been in the context of retail companies, whose requirements for data entry are different from those of a contractor. Hiring such a person and turning him or her loose on your books without providing indoctrination in your company's special requirements would be a disaster. It's all but certain that person will provide inappropriate job costing and incorporate bookkeeping practices that don't meet your company's needs.

The problem is that self-proclaimed "experts" are likely to be hesitant to ask procedural questions. They have promoted themselves by claiming to know how to handle this stuff. The temptation will be to either treat your company's transactions in a manner similar to the way in which they led the last company's transactions, or create their own solutions without fully understanding the kind of reporting your company requires. Experts often feel that asking how to do something will erode confidence in their ability.

"But that's prideful and borderline delusional," my client remarked, and noted that he'd recently needed to fire an employee who refused to admit that he did not know how to install flashing correctly. Despite having been instructed verbally and provided with written instructions, the guy still did it wrong. In that case, since he'd been told how to perform a task correctly but persisted in doing it his way (incorrectly) and refused to acknowledge that his way didn't work, "prideful and delusional" seem accurate. This, however, is not the same as ignorance. If an employee doesn't know what he or she doesn't know, doing something "his or her way" instead of "the company way" is something you can work with. The person still may be trainable.

Consider how many contractors a few years ago didn't know much about the RRP regulations. They continued to scrape and sand lead-based paint the same way they had been doing for the past decade, letting it fall on the ground or blow into the neighbor's kids' sandbox without knowing they were now in violation. This wasn't pride; this was simply ignorance and is completely different from a contractor knowingly violating the rules because he thought he could get away with it.

**Be clear with new hires about not only what tasks they must perform but also how to do those tasks the “company way.” This applies to entering data and fielding phone calls as much as it does to flashing a window or cleaning up paint chips.**

When making any new hire, bear in mind that a person probably feels qualified to perform the tasks in the job description. It's your job to make it clear that a new hire not only needs to perform certain tasks but also needs to get them done in “the company way.” This applies to entering data and fielding calls from new prospects as much as it does to flashing a window or cleaning up paint chips.

#### **SOME HIRING TIPS**

■ **An open attitude** is more important than specific accounting skills or expertise in a given software program. Ask candidates what they enjoyed the most and least about their previous job. For example, if a candidate reports enjoying the challenge of handling many different tasks, or comments that repetitive tasks are boring, beware of hiring that person to perform the same tasks day in and day out.

■ **Ask questions** about how candidates handled a challenge in their last position. Did they consult a software manual? Google an answer? Call up the last bookkeeper? Consult with other staff? Go straight to the owner? Make up their own solution? This will give you a sense of a candidate's commitment to finding a solution as well as his or her willingness to seek help. Remember, autonomy and self-motivation are great up to a point, but if these traits get in the way of seeking assistance when needed, you may wind up with some “creative” solutions that will impair your data file or fail to conform to generally accepted accounting principles (or your company's procedures).

■ **Ask candidates** about the greatest contribution they made at their last job.

■ **Invite candidates** to provide a “must have” list of training requirements that they would need from you in order to perform an excellent job. Details are important here because they reveal the candidates' expectations and allow you to gauge the degree of importance the candidates place on company procedures and culture.

■ **Ask** whether candidates feel more energized or efficient when working alone or as part of a team. As a follow-up, find out who they consider to be their team members. Does the team include just the office staff? The owner? Production staff?

■ **Ask** candidates to describe their perfect working conditions. Do they enjoy being in a large room with chatty co-workers? Can they handle ringing phones or noise from the shop next door? Do they like the radio on or want to be alone in an office with the door shut? If your office environment can't provide what they need to be effective, it's best to find that out before you hire them.

A trial period will give you the opportunity to provide specialized training (in the form of mentoring or documented procedures). Appropriate candidates should quickly learn the party line; those who persist in doing things their way despite training and correction need to be let go.

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