

## Job Description Walkthrough

All right. Here we are at the job description template. Now this can be used for really for any job out there. What we're going to actually do is I'm going to use ours that we used for a student success team member because I want you to see ours through and through, but it's important to note that you can use this for finding a bookkeeper. You can use it for finding administration. You can use it for finding a salesperson. You just need to adapt it obviously to the job. Now you're going to use this, we call it a template for a very good reason. This is a great place for you to start. It's always like learning a new recipe. When you first get that recipe, you should just follow it to a T, but then maybe the third time or fourth time you start to add your own spin to everything.

And the same thing here, we just don't want you to ever start with a blank sheet of paper here at Bookkeeper Lab. That's one of the big things that we talk about is learning from what others have done. Learning from my mistakes, learning from your contemporaries. There are colleagues that are inside of the group. Let's walk through this step by step. And I've got some specific instructions for you.

Now the first thing that I want you to do is to go and download the Finding a Bookkeeper Worksheet. It's three pages, it's right below this video. Go download that. Press pause right now because we're going to walk through that step by step. It looks like this. I got a little picture over there on the side of page one; so, go download that. Oh, I'm just kidding. I won't whistle that.

All right. Assuming that you could have pressed pause and now you are back, we are going to, you should just print it out and then follow along with me. I should have gone ahead and said that. Let's walk through each of these sections. You'll see at the very top of page one we have the high-level summary. This is basically answering the question, who are you? And what are you looking for? And you being you. You being your business, your bookkeeping operation, your bookkeeping business.

This is where we want to get pretty specific and we want to let our personality show all the time in all of this. And we could call our personality in a business a culture, what we believe, how we act, who we want to be around. If we were at a cafeteria with a whole bunch of kids, what would our table be called? That's really what we want to get across here in the high-level summary. Because we really want to work with people and I'm getting a little bit ahead of myself, but we want to work with those people that we enjoy being around, those people who believe what we believe.

Here's what we put as part of our high-level summary. Our goal at Bookkeeper Launch is to teach students who are enrolled in our course how to start and grow their own virtual bookkeeping business. We are looking to hire a full-time student success team member for a long-term position. There is a goal right there, teach students enrolled in a course how to start and grow their own virtual bookkeeping business. And then we're talking about, hey, we're looking for somebody full time. And again, this is something that we use very specifically.

Also, here you should include things like your company and what you do. This is just a summary, what I put up there, the paragraph before. But what is your name of your company? What is it that you do? What are all the services that you provide? Are you in a niche? Maybe you get that out into the open. What are the services that you provide? The job title? Very important. What's this job title? Is it bookkeeping assistant? Is it a full charge bookkeeper? Is it salesperson? We're just going to say right now that it's a bookkeeping professional, so make sure and put that in there. Is it full or part time? I know a lot of this seems very obvious, but I want you to have all this in there because you're going to get a lot of questions. You want to make sure, just like with our marketing that we answer all the questions that a candidate would have.

Because remember, the big two things that we have to do as a business leader, as an owner of a bookkeeping business, is to never stop recruiting, always be recruiting and always be recruiting new clients in the form of marketing. List these things out. Your company, what you do, the job title, is it full or part time? Is this temporary or permanent? Is it employee or contractor? I don't want to get into all the legalities of that, but most of us, when we are working with these people, they're traditionally going to be an employee. That's a conversation for a different day. You know all about that. If you don't, come into the group and we can help you out with that. But that's just a high level summary. You'll see that I'm at the very top of page one right there.

Now, the next thing that you'll see are some check boxes, responsibilities. What is this? What are they going to be doing day to day? What you want to do is to paint a visual as concrete as possible of what they'll be doing. Now, if they have experience, they should have some general idea, but make no assumptions here. You want to get very concrete in what it is that they are going to be doing. This is going back two hours now. I'm going to deviate. This is not you; we just repeat. This is not you hiring a bookkeeper. This was us hiring a student success team member. Here we're getting very specific.

Answer support emails from students. It doesn't need to be any more complicated than that. You can visualize yourself doing that. Respond to social media comments and questions in our Facebook groups. Same thing there. All right, so we probably could have said reply to comments and questions in our Facebook groups. Didn't even have to say social media. We're always refining ours as well. Never going to have it perfect. Next thing, cohost a weekly live Q and A webinars to answer student questions. Now this one right here, it may cause some candidates to pause and go, oh my goodness, I really don't want to be in front of people. Well, that's good. Just like with marketing, this is meant to repel as much as it's meant to attract. Those things that they're going to be doing, the important high-level type of things and responsibilities, what are they going to be doing day to day? Need to be listed right here. And for you, there's obviously going to be different things. You know what you're looking for in a bookkeeping professional. Make sure that you're listing all of those responsibilities out.

Now the next thing is requirements. We talked about responsibilities, but requirements, what are those? Well, they're nonnegotiable skills and or competencies. These are things that you

have to have. No second guessing. That's why they're called a requirement. Experience with QuickBooks Online. Again, this is from us looking at a student success team member because we don't want to have to teach somebody how to use QuickBooks Online from the beginning. Now they don't have to be a genius in it for us, but we want them to have some experience with QuickBooks Online getting in there because guess what? They're going to be helping students through problems that they're having in QuickBooks Online, so they need to have that. Speak fluent English. That's very important. Also, excellent verbal and written communication skills. Looking at this, now I would even get more specific. Being able to construct an email that takes complex and makes it simple like this one right here.

We could give examples in there, but these are requirements. Again, these are just kind of a higher-level type of thing, so we wanted them to have that and they're detail oriented. Again, I could get more specific with what I mean by that and the more that I can do that, the better. That's a little bit abstract right there so I give myself a B minus or a C plus on that one right there, it can get a little bit better. Those are requirements. Again, non-negotiable skills and or competencies. For you, it could also be experience with QuickBooks Online. It could be experienced with QuickBooks Online and as well as getting very specific, reconciling bank accounts, entering the bank feeds, preparing journal entries, creating a general ledger. All of these different things. You want to get very specific in there. Again, you can not apply or you should not apply. You'll get a bunch of bozos that do apply even though you put these in the requirements. But that's what these are right here.

Now experience, these are preferred skills. They're not always a requirement, but they're very helpful to have. I can tell you that one of our best hires did not have direct experience as we were asking for, but we were so impressed by her in every other regard and if you're listening to this Faith that's you, that we hired her anyway. This was not a requirement. This was really experience. The same thing here, as we were looking for the student success team, it would be nice if they knew Help Scout because that's how we support our students. It's a platform. There's not a huge learning curve but it would be great. A perfect person would also know Facebook groups and how to communicate in there. Google Docs and Calendars. Slack, GoToWebinar.

Now for you, it might be QuickBooks Online. You had that in the previous one. This one might be Hubdoc, this one might be TSheets. All the things that are nice to have, put those in there. And you may want to put those in there and in some sort of order of preference. You don't have to, but kind of this is where you're painting out what does a perfect candidate look like? That's experience. You see that, that's at the top of page two.

And below that we see other, tangible and intangible. And this is where we include that Easter egg or Easter eggs. This is where we're trying to see if they're detail oriented. Because I guarantee you that every position that you're hiring for as well as us, they need to be detailed oriented. We don't want somebody out there that's just applying to every resume possible or excuse me to every job slot open with their resume as possible. But this is where you get creative and you show some personality. Again, let your job description and all that you're

doing come alive just like we talk about in the marketing. Don't be boring. This is not the place to be boring. In a competitive workplace and otherwise you want to let your personality shine.

Here's where we would say, possesses ninja customer service skills. Ninja is a little bit overused now, but when we were starting off, that's what we used. Is empathetic and loves to help others. Has a quiet workspace for meetings and conversations. Very important that there's not screaming kids and dogs in the background because you're going to be talking with students and you're going to be on meetings with us. That's important for you to have. Is available between 9:00 AM and 5:00 PM Eastern. Very important. Include the words Dunder Mifflin in the response. Right there I probably would've put that one in the middle and when we actually go through and do that, we do because if they don't pay attention, if they don't say, "Hey, attention Dunder Mifflin."

Now really what I'm looking for is them to say attention Michael Scott of Dunder Mifflin. That means that they watch The Office. Now I'm obviously not going to hire somebody for that, but they picked up on my humor and they, I know that they're kind of have seedlings of being one of us. It's like the Minions. And it's like on Toy Story when they get you are one of us. The little toys, I can't remember what they are. Any who. That's the other, the tangible and intangible. Be sure include that Easter egg, which is that very last one that I had there. Maybe that's not your personality to put something like Dunder Mifflin, but do something that expresses something that they should do. Very specific action, include the word Mr. Debit or something like that into their reply so that you know that they're paying attention. That's the other tangible and intangible.

And then we have company values. Don't confuse this, company values or values in general are what you believe. We believe that we should take a student first mentality here. That's a company value. That's just something that I believe. You don't have to think there's a lot of books and stuff out there, but just like, hey, what is it that I believe about this business? What is it that I believe about this business as it relates to my team members? This is where you're sharing your culture, your values, and your belief system. Accuracy and speed. We strive to give our students timely responses while maintaining high standards of professionalism and knowledge. Accuracy and speed, that's one of our company values.

Honesty and integrity. As a team, we need to be able to trust each other and work together in an honest and straightforward manner. The next one, communication. We all work remotely, very important that they understand that, so the ability to communicate effectively and efficiently is crucial. Proper life work balance. Work is important, but so are friends, family, binge watching Netflix, little thing right there, little personality or whatever floats your boat. Floats your boat. How many times did you see that in a job application? I'm letting my personality come out right here. Now obviously these aren't your values. These are not things that you believe. Well, I bet you believe in some of them, but they might not be the things that you want to highlight. What are those things that you absolutely want to highlight? That's underneath the company values there.

And then who we are. More details about your company and how you operate. Again, show personality. We're a small but growing group of men and women who truly want to help good folks start and operate their own successful business. We work all over kingdom come. While our distance may be vast, our connections exist in our shared vision for helping others. We work hard but laugh a lot. The ability to quote The Office or any Will Ferrell movie is a plus. Right there, again, I'm not going to hire based upon that, but I'm trying to let things show through right there. Very important. Not boring. If you're stodgy and humorless in the words of Kelly Clarkson, "Just walk away. Just walk away." I won't sing anymore because I've just probably had some of you hit pause or thumbs down or whatever it is. But that's who we are.

Now, the last thing that we would want to do is to put some sort of aptitude in here, a test. Make them work for it and show their knowledge and skills. This is what we would put in ours, and this is again, is our actual thing on there. You could have an entire bookkeeping test that you put together to make sure that they actually know what they're doing. Again, the best test is to actually do a working type of interview that we've talked about here inside of Bookkeeper Lab, but this is what we do.

Please answer the following questions when replying to this post. What is your bookkeeping superpower? For us, we were hiring somebody that is going to help people understand bookkeeping, understand the business aspects of it. I want to know what your bookkeeping superpower is. What is a bookkeeping superpower? Well, hell if I know, but I want you to kind of pick it out. Oh, I am excellent at reconciling the books. You know what? If I see a cent off, I go ballistic. Hey, awesome, that's great. I need somebody that pays attention to detail. What is your bookkeeping superpower? You could actually use that one right there.

This is something that we would actually put them in a situation, how would you respond to a student that asks this question? I'm getting confused about debits and credits. Why do asset accounts have debit balances and liability and equity accounts have credit balances? They should be able to explain that. One of the things that we also believe, and I can put this as a core values, that we believe in taking the complex and making it simple. If that's one of my beliefs and it truly is, then I would want my person who's representing us as a student success team to be able to respond to this and not confuse even me after they've answered it. We're putting them in the actual situation.

How would you respond to a student who asks this question? Hey, I'm starting to onboard my first client, yay. She hasn't used any software or any even spreadsheets for her bookkeeping. She wants me to input her transactions starting January 19 into the online software. She's been in business three years. My question is, what do I need in order to set the conversion balances? Have we talked about conversion balances in any of this? No, we absolutely haven't. Should they know that? Remember one of the requirements was that they knew QuickBooks Online. Then they should know what conversion balances are, whether they know zero or whatever, they should know something about this. If you can clearly tell that somebody ain't got a clue, then it's time just to weed that person out because the worst thing is getting a 100 of these

applications and then you only find one or two that are good. But hey, the good news is that this test can weed through a lot of those for you where you don't have to.

Here's some of the key takeaways as we close this out. Be as clear as possible in what you're looking for, who you're looking for, the values that you have. Show personality. I've said that about a bazillion times. You don't want to work with someone that you wouldn't want to have a beer with. We're not looking to have our next BFF, but hey, would you sit down and have a beer with this person and tell some jokes and talk about life and all that sort of thing? Let that shine through. As hard as it is, you need to reject applicants that don't answer your questions or include your Easter eggs. Automatically anybody who doesn't answer, attention Dunder Mifflin or use those words, we actually do control F to find, you're out. I don't care if you could walk on water and you can do bookkeeping in your sleep. If you didn't pay attention to detail or just said, "Screw you, I'm not going to do that." Then I don't want to work with you, so bye bye. I'm not going to be working with you.

Go easy on yourself. This is a work in progress. You'll always be making improvements. Improvements in terms of being able to find good candidates, refine your job description. Remember at the very beginning we said that this is like a recipe. You should follow it to a T. But as time develops and as you learn how to hire and as you learn how to qualify candidates, you're going to get better and better at this. That is for certain. And remember, an amazing job post does not guarantee that you're going to get an amazing candidate. Some people are very good interviewers. One of the things that I suggest and we use this is to trust your instincts. Trust your gut when hiring. And one of the safeguards for that is always what we've talked about here, the interview, the working interview is, that's something that you can do.

But you're going to make mistakes. This is not a foolproof method. You're dealing with human beings. Nothing ever is. But the great thing is that once you understand this, and once you can start articulating it, you're ahead of about 95% of the competition with what you've done right here with the job description that you have. Those are the key takeaways.

Now, what I want you to do is to use this. What job are you looking for? What position are you needing to fill? Use this template to go and put that into terms and then take that, put it online, put it on your website, which I guess is online too. Put it wherever that you need to. But you need to be thorough in this and follow this in a step by step manner. Go out there, go find that next person who's going to allow you to focus on what you do best.