



# 8 Essential steps to train a new cloud bookkeeper

Juliet Aurora



# CPD Process

In order to receive CPD credit

- Be sure to sign in or scan your badge for this session
- You must stay in the session for the duration of the training
- This session is eligible for **1 hour of CPD**
- CPD certificates are emailed directly to you within 4 weeks of the conference date to the same email address you used to register

# About today's speaker



Juliet Aurora  
#HOTT Kninja  
@JulietAurora

Co-Founder Kninja Knetwork  
Co-Owner AIS Solutions

Author of The Kninja Way – Our Journey to  
Firm of the Future

Part of the HOTT Kninja Team – Focusing on  
Hiring, Onboarding, Team and Training

# Agenda

**The importance of training internally**

**Differences between training a cloud vs. traditional bookkeeper**

**8 Steps for training**

**Metrics to measure the success**

**Q&A**



# The importance of training internally





**What if I train them & they leave?  
What if you don't, and they stay?**

-Levi Lusko





# Our experience



## Team interviews

- None
- 90 Day check in
- Quarterly success meetings





# Differences between training a Cloud vs. Traditional bookkeeper



# Traditional vs. Cloud

- Approaches
- Resources
- Measurement of success

The skill set of the bookkeeper has changed



# 8 Steps to effective training



# Step 1 – Define the role

**The role of the bookkeeper  
has changed**



# Step 1 – Define the role

- Deliverables
- Responsibilities
- Measurement of success

Be specific

## Step 2 – Excite them

**Excitement encourages  
the desire to learn**



## Step 2 – Excite them

- You need to be excited
- Changes in the industry
- Acknowledge the fear

Excitement encourages the desire to learn

## Step 3 – Roadmap

**They need to know where  
they are headed**





# Step 3 – Roadmap



35%

# Step 4 – Expectations

**Be as specific as possible**



## Step 4 – Expectations

- What does their journey look like?
- Certifications
- Timeline
- Rewards / consequences

Be as specific as possible

## Step 5 – Segment the training

**Attain proficiency, then move on**



## Step 5 – Segment the training

- Have a plan
- Manual
- Automate
- Leverage their training

Attain proficiency, then move on

## Step 6 – Practical experience

**Attain proficiency, then move on**



## Step 6 – Practical experience

- Repetition is the mother of all learning
- Multiple clients
- Multiple scenarios
- Explain the process

Attain proficiency, then move on



# Step 7 – External certifications

**Leverage what is already  
created by others**



## Step 7 – External certifications

- Don't recreate the wheel
- Additional marketing collateral

Leverage what is already created by others





## Step 8 – Encourage, praise & reinforce

**Recognize that you know  
it's a big shift**





# Measuring success

# Measuring success

And you **MUST** measure!



# Measuring success

- Internal benchmarks
- 3rd Party Apps – Floqast, Mindbridge
- Feedback to employee
- Ask

You can't manage what you don't measure





# Questions?



**Train people well enough so they can leave, treat them well enough so they don't want to**

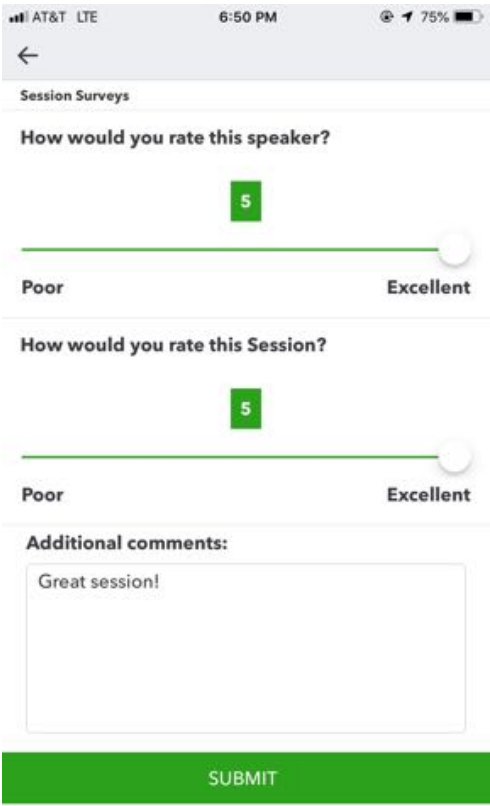
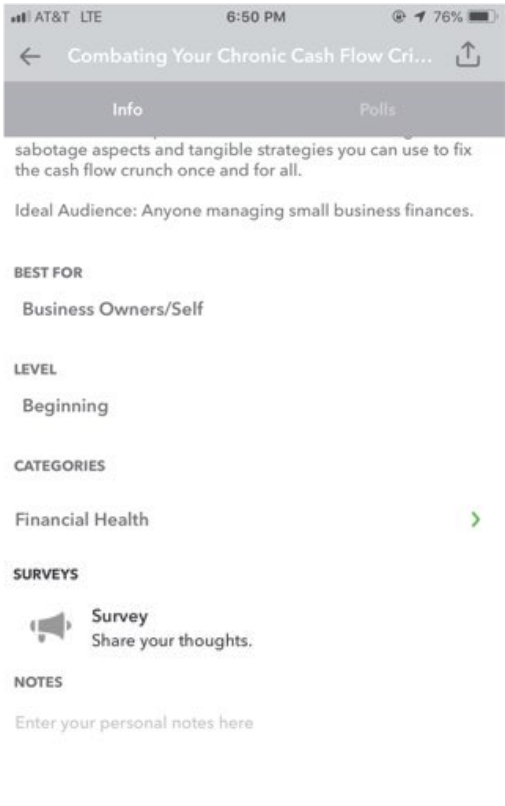
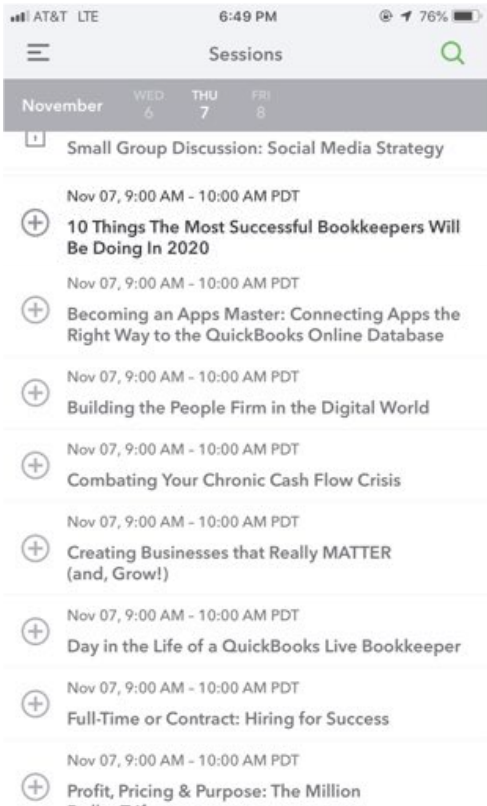
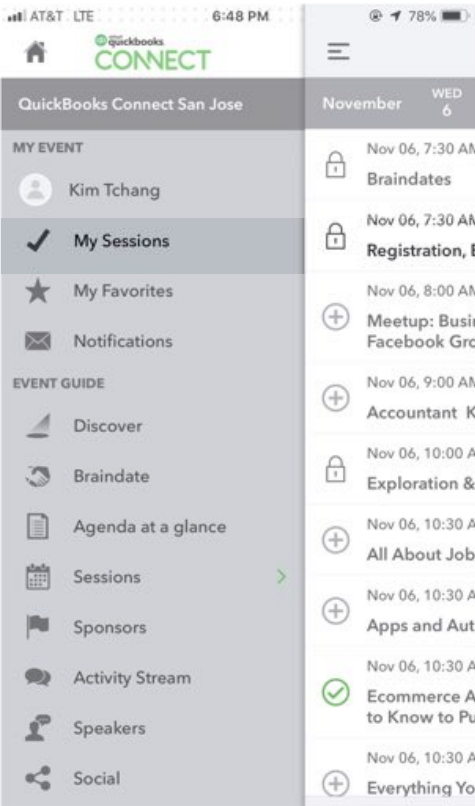
- Richard Branson



# Rate this Session on the QuickBooks Connect Mobile App

Provide feedback to help us design content for future events

1. Select Sessions
2. Select Session Title
3. Select Survey
4. Add Ratings



# Material Download

1. Find the session on the agenda
2. Select + for more information
3. Download PDF of slides and/or supplemental material

<https://quickbooksconnect.com/agenda/>

The screenshot shows the QuickBooks Connect agenda page for November 7. The header includes the QuickBooks Connect logo, navigation links (Why Attend, Agenda, Speakers, Pricing, Sponsors, Travel, FAQ), and a 'Register now' button. The date 'November 7' is highlighted, with 'November 6: Accountant Day' and 'November 8' also visible. A 'Print Agenda' link is in the top right. Below the header, a paragraph describes the event: 'Get new insights from experts in business growth, organizational culture, financial health, technology and life skills. Book a Braindate with peers and expert consultant for one-on-one learning. Unwind in the evening with our legendary celebration.' A search bar labeled 'Search for sessions' is present. Below the search bar, filters are listed: Business Growth, Life & Business Skills, Organizational Culture, Technology Training, Advisory, and Financial Health, with an 'Expand all +' link. The agenda items are listed in a table-like format with time slots on the left and session titles on the right. The sessions include 'Registration, Breakfast & Exploration', 'Braindates' (with a description and 'Learn more' link), 'Yoga', and 'Breakout Sessions' which includes 'Small Business Meetup: Relationship Marketing and the Power of Human Connection', 'Small Group Discussion: Social Media Strategy', 'Small Group Discussion: Showing up - Why What You Wear Matters', and 'Small Group Discussion: Build Your Dream Bookkeeping firm'. Each session has a '+' icon to its right for more information.

Time	Session Title	Action
7:30-7:00 am	Registration, Breakfast & Exploration	
7:30-10:30 am	Braindates New this year, you can use Braindates to book time with fellow attendees, expert consultants and the QuickBooks support team. <a href="#">Learn more</a> Best for: All Audiences CPE Hours: not eligible	✕
8:00-8:30 am	Yoga	+
8:00-8:45 am	Breakout Sessions	
	Small Business Meetup: Relationship Marketing and the Power of Human Connection	+
	Small Group Discussion: Social Media Strategy	+
	Small Group Discussion: Showing up - Why What You Wear Matters	+
	Small Group Discussion: Build Your Dream Bookkeeping firm	+



OWN  
THE  
FUTURE