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Jim Boomer • Nov. 13, 2015



Effective and efficient new hire training is the goal for most firms. We want a methodology or delivery method that sticks with employees early and often. The luxury of unlimited time to train and retrain over and over until the employee gets it is not afforded to most of us. We need to put the time in up-front to ensure achievement of a baseline competence.

While you certainly have to take into account learning styles, I would like to share a simple training approach that I learned from my partner, Dustin Hostetler. It is a proven process that has been used successfully by our clients and in a variety of professions outside of accounting. It engages employees and ensures effective learning from Day One.

The Traditional Approach

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engagement necessary to feel comfortable asking questions. This significantly restricts their learning because they're afraid of asking a dumb question. A lot of that time ends up being wasted.

If this sounds like your approach to new hire training, don't stop doing it, just take it a step further. There is value in the group learning approach, especially to set a foundation around software programs and processes. You just can't expect them to get everything they need to function at a high level. This is where the four-step approach comes in.

The Four Step Approach

After you get through the initial orientation and general group learning, a new employee's first four projects should be done collaboratively with a more experienced team member. To illustrate the approach, we'll assume a senior is training a new hire at the staff level on tax return preparation.

Step 1: I Do, You Watch

In this step the senior is in the driver's seat and the staff is along for the ride. The senior walks through every phase of the process: how the process works and the tools used; how client information is received; how we send information to the client; what our work papers look like; how we begin reviewing or inputting the numbers; all the way through the process to a completed tax return. During this time the staff person is watching and should be diligently taking notes.

Step 2: I Do, You Help

In this step the senior stays in the driver's seat and goes through the entire preparation process. As the senior is preparing the return he or she is asking the staff person questions to see what they remember while also soliciting their help at

various points. The senior may ask, where can I find these client source documents?

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feedback.

Step 4: You Do, I Watch

Similar to step 3, the staff is driving the process from start to finish. The senior is watching and remaining silent unless there is an imminent crash on the horizon. In that case, they provide a gentle nudge but they are essentially letting the staff prepare the entire return.

Slow Down to Go Fast

Firms that have invested the up-front time required for this approach have recognized tremendous benefits in terms of staff competence and productivity. One of Dustin's recent clients told him that during this past busy season their interns were operating at the level of two-year staff. Slowing down on the front end to spend the time to train and develop your new hires with this collaborative approach will lead to big gains in the future. Slow down to go fast – you have to invest time to save time.

Firm Management

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