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pandemic, it's likely that paraprofessionals will loom large in their plans. There are few things more important today than an adaptable workforce...

Paul McDonald • Jul. 13, 2020



As accounting firms refine their business strategies in the wake of the COVID-19 pandemic, it's likely that paraprofessionals will loom large in their plans. There are few things more important today than an adaptable workforce — and paraprofessionals fit the bill. They can be full- or part-time, depending on your needs. They can work on-site, as remote employees and as contractors, giving you multiple options as part of a [flexible staffing strategy](#).

Common specialties for paraprofessionals in accounting include:

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paraprofessionals to your staff, therefore, can streamline your firm's processes and reduce costs. Here are some thoughts on how to build and manage a successful team of paraprofessionals.

Attracting the right candidates

The hiring process for accounting paraprofessionals begins [before you post a job](#). Spend time asking yourself and colleagues the following questions:

- **What do we need?** Are you looking for a full-time employee to work on major client accounts? Or do you have a short-term project an interim professional might be the right fit for?
- **What kind of experience will our hire need?** Most firms prefer paraprofessionals with a bachelor's or associate's degree, or those with equivalent work experience — usually a minimum of three years in a finance or accountancy position. Depending on your requirements, you may also need someone with a Certified Accounting Paraprofessional (CAP) certification, which is the industry standard. It validates a candidate's knowledge of accounting functions such as bookkeeping, payroll and tax services.
- **What skills should candidates bring to the table?** Paraprofessionals should have experience working with financial software such as Microsoft Office, Excel, QuickBooks and QuickBooks Online. Candidates will also need soft skills and to fit with your organizational culture. At a time when many employees are working either remotely or in offices redesigned for social distancing, qualities such as a flexible mindset and the ability to work independently should be near the top of your list for personal attributes.

Interviews — remote or in person

After you've narrowed your list of candidates based on resume reviews, set aside time

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and body movements show they are comfortable with the process? Do they quickly establish a rapport with you?

As well as asking them about their work experience and technical skills, give candidates the chance to speak in more personal terms about what they enjoy most about working in accounting and what they think they can bring to this particular role. There are no right or wrong answers to questions like: "What do you consider the top three skills of a great bookkeeper?" — but the way a candidate responds can tell you a lot about them. Do they seem passionate about their work? Do they communicate their thoughts clearly?

Managing your team

Adding to your paraprofessional team is only part of your role as a manager, of course. You've also got to ensure the full group remains productive and satisfied with their work. Keep these tips in mind, whether your team is in-house, working remotely or some of both.

- **Set clear expectations — but don't be rigid.** Clearly communicate to your staff how you will evaluate their performance and ability to satisfy clients. They'll appreciate knowing what's expected of them, and in the current circumstances, they'll hope for some flexibility from you in return. Be sure to provide this, particularly to people who work from home. For example, while many remote workers prefer to work "normal" hours, others will need a more fluid schedule if they're to maintain their work-life balance in a topsy-turvy world.
- **Put the right technology in place.** Make sure your employees have access to the programs and platforms they need to do their jobs. This includes financial software such as QuickBooks and the latest work-at-home equipment and communications apps, such as Zoom, Teams, WebEx, Basecamp and Slack.

Additionally, consider reimbursement for Wi-Fi at home to ensure seamless

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the year schedule one to one to check in to see how people are doing, and be sure to offer constructive support if they seem overworked.

With thoughtful recruitment and smart, flexible management, paraprofessionals can be the lifeblood of any accounting team — not just in the future, but right now.

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