

# Battling the Staffing Crisis

Attracting, Recruiting & Retaining  
High Performing Workers



**WOODARD**<sup>TM</sup>

# Learning Objectives

- Competitive Recruitment Strategies - Locating and Recruiting High Quality Workers
- Virtualization models that widen your recruitment pool and foster employee retention
- Building a culture that empowers your team and reduces employee turnover



# Handouts

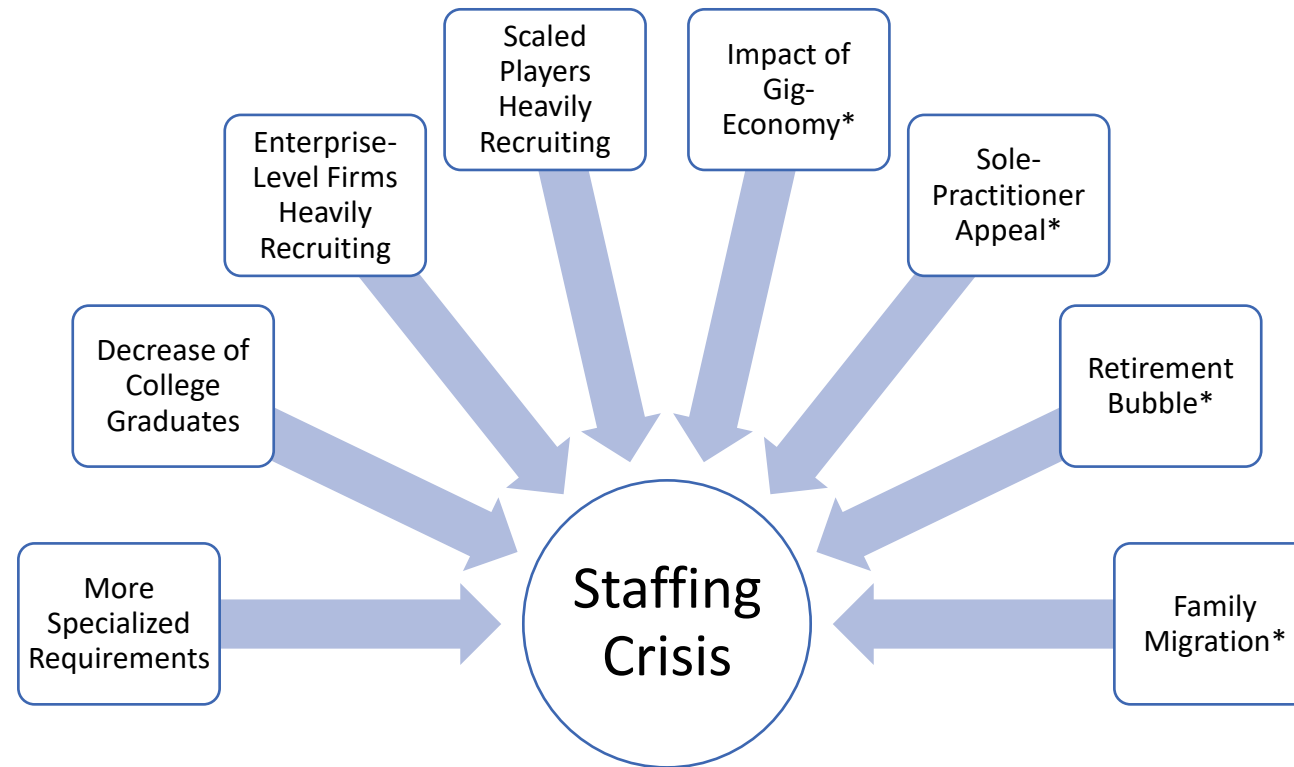
The slides from this presentation will be available *after* the live presentation is over.

Download handouts at  
[Woodard.com/events](http://Woodard.com/events).

We will post the handouts no later than  
5:00 PM Eastern today



# Drivers of the Staffing Crisis



\*Created by or accelerated by COVID

# Segment 1

Competitive Recruitment  
Strategies - Locating and  
Recruiting High Quality  
Workers



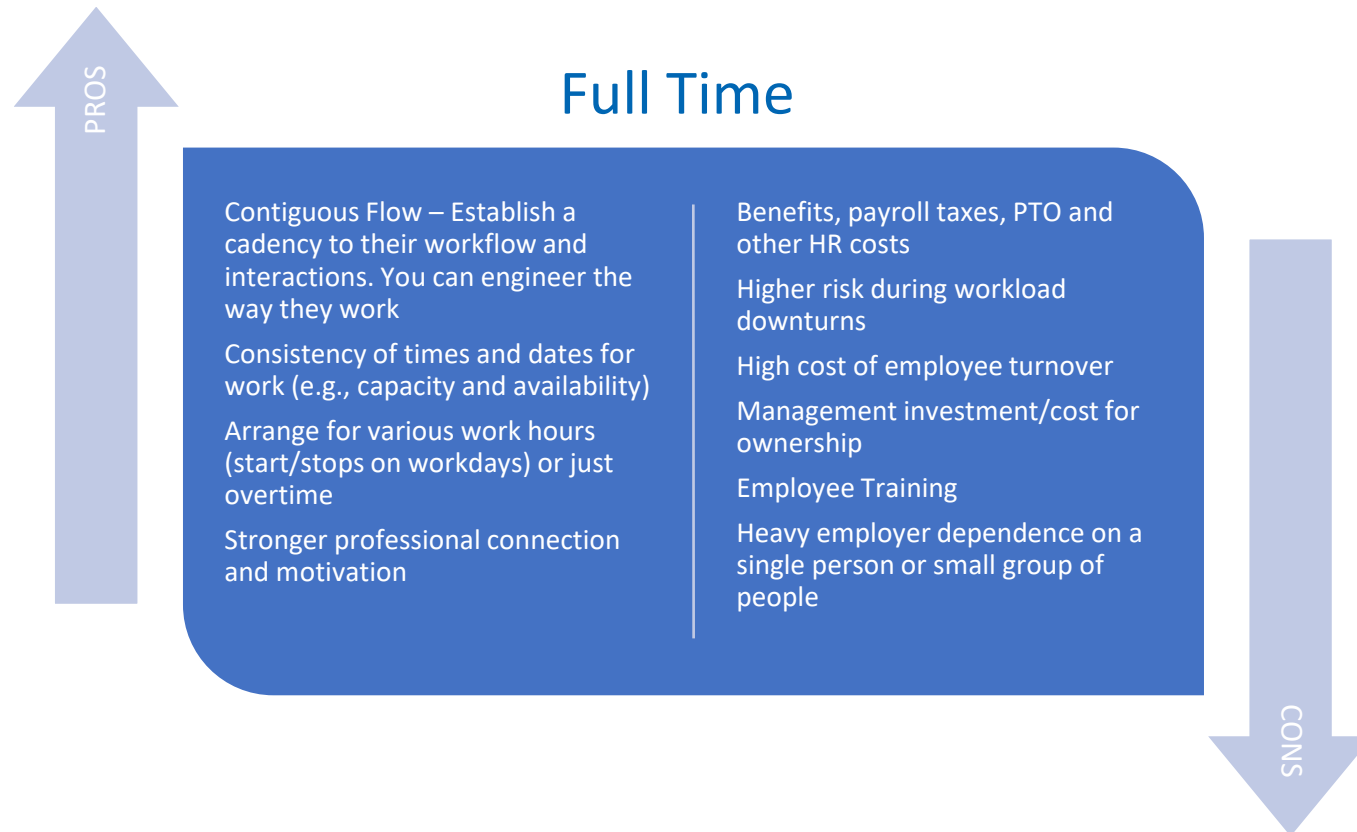


# Screening and Hiring – Best Practices

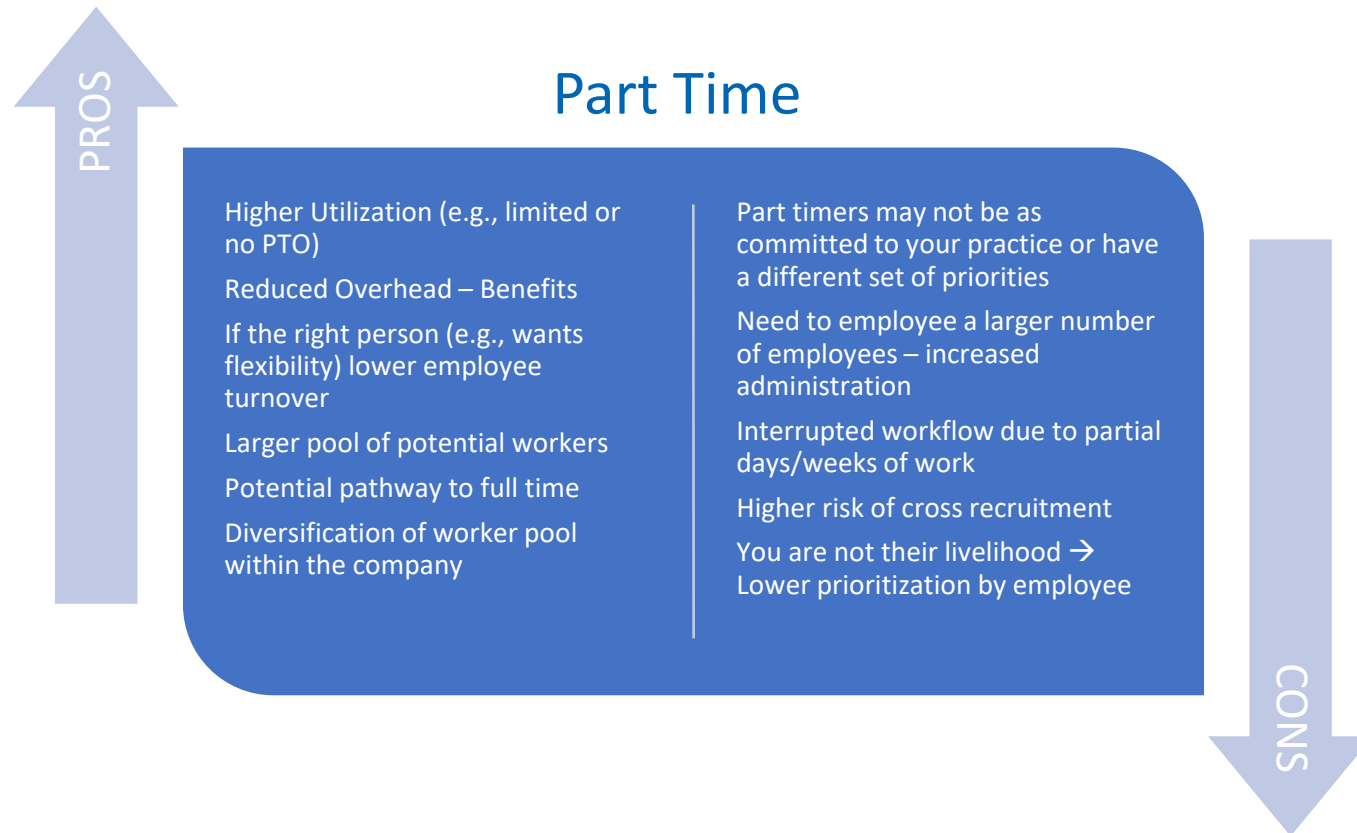
Online Recruitment Sites	Recruitment Agencies	LinkedIn	Job Fairs	Professional Associations	Former Client Employees
Pro: Inexpensive	Pro: Reduced Administrative Lift	Pro: Free (Depending on the Strategy)	Pro: Affordable	Pro: Affordable (or Free if You Are Already a Member)	Pro: Pre-validated knowledge and experience
Pro: Strong Candidate Pools	Pro: Strong Model for Local Resourcing	Pro: Strong Candidate Pools	Pro: Strong Model for Local Resourcing	Pro: Pre-validated subject matter expertise through certifications	Pro: Prior opportunity to review work interactions and work product
Con: Not Ideal for Local Resourcing	Con: Very Expensive	Con: Not Ideal for Local Resourcing	Pro: Pre-Vetted Baseline Industry Knowledge	Pro: Opportunity to interact with candidates informally prior to hiring	Con: Often have limited work experience managing multiple clients
Con: High Resume/Candidate Screening Lift			Con: Limited or No Work Experience	Con: Recruited employees know all your peers	
			Con: Time Consuming	Con: Higher risk of employee turnover	
			Con: Highly Competitive		



# Candidate Types/Categories

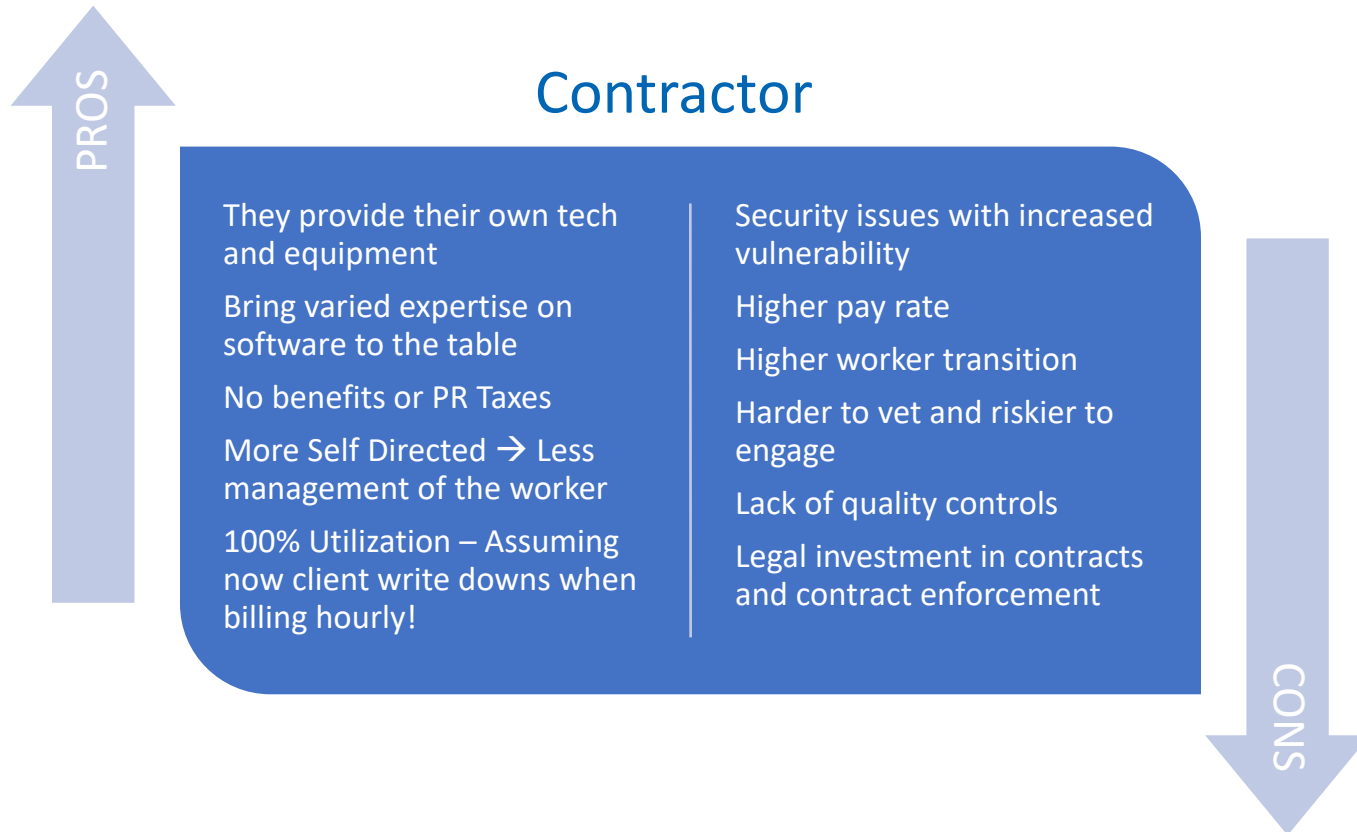


# Candidate Types/Categories





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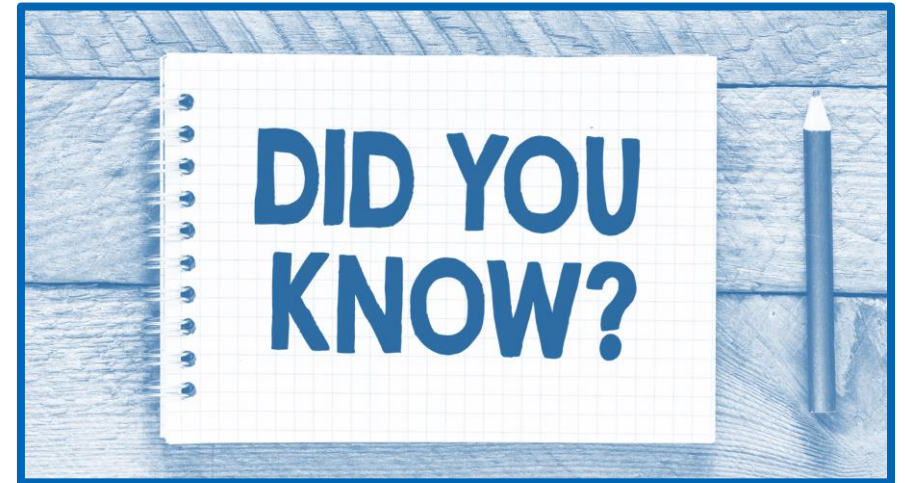


# Candidate Types/Categories



## Did You Know?

Woodard partnered with Wolters Kluwer to offer their world-class, enterprise-grade shared service center in a way that is right-sized for smaller accounting firms?

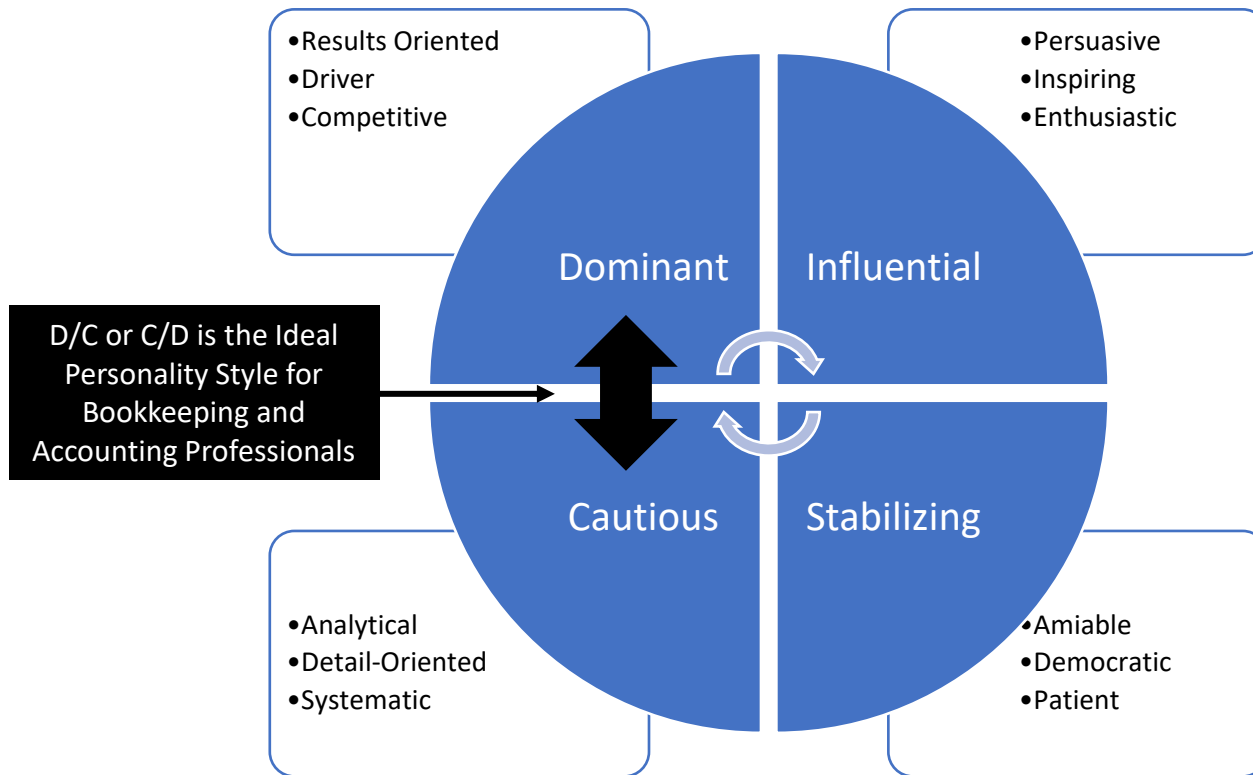


# Screening and Hiring – Best Practices

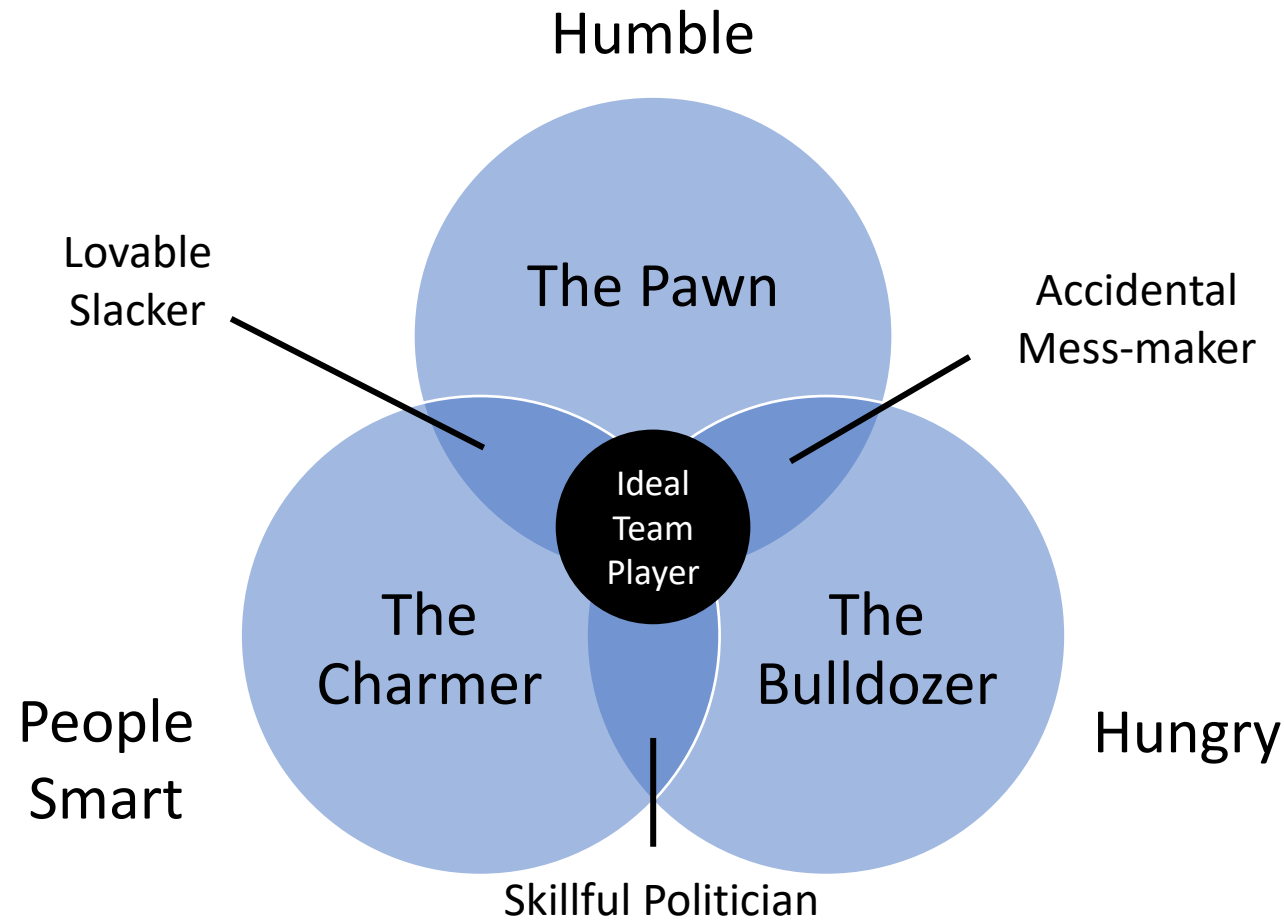
- Find a balance of private and professional experience
  - Professional: Validates the candidate can manage an assigned book of business
  - Private:
    - Provides insight into small business needs and operations
    - Provides industry-specific insight/knowledge for niche practices
- Solicit context during interviews for
  - Gaps in employment
  - Short-term positions in employment history
  - Employment experience outside the profession – especially if it is recent
  - Cultural fit (More on this in Segment 3 of this event.)
- Conduct assessments
  - Leadership Style (*The Synergist – Les McKeown*)
  - Saboteur (*Positive Intelligence - Shirzad Chamine*)
  - Ideal Team Player (*The Ideal Team Player – Patrick Lencioni*)
  - Personality style and type (DISC – Via Authorized Online Testing Centers)



# Screening and Hiring – The DISC Assessment



# Screening and Hiring – The Ideal Team Player





# Segment 2

Virtualization models that  
widen your recruitment pool  
and foster employee retention



# 10 Essential Components of a Virtual Work Model

1. A team collaboration tool (e.g., Microsoft Teams/Slack)
2. Daily standing web-meeting (about 15 minutes) each day (require webcams)
3. A catalog of daily tasks per Person – in a collaborative system. Discuss during the morning meeting
4. Closed circle loops on daily task statuses at the end of the day (in Teams/Slack)
5. Highly organized weekly web meeting to align on goals for the week and to conduct proactive training
6. A controlled workspace with minimal background noise and distractions



# 10 Essential Components of a Virtual Work Model

7. Clearly defined and communicated performance measurements to detect and mitigate systemic personal distractions
8. Unlimited PTO (See #7 above)
9. Strong internet. Pay to upgrade the remote worker's internet connection (as needed)
10. Standardized equipment and work protocols
  - Company Managed VOIP Phone Service (No Hard Phones)
  - Office-grade, background canceling headsets
  - Background protocols (or requirement to blur the background)
  - Use remote device controls (e.g., Microsoft Intune/Active Directory) for IT services
  - Task Management for Administrative and Client Tasks (More on this in an Upcoming Slide)



# Why Deploy a Virtual Work Model?

- For the context of this event: Greatly streamlines recruitment of highly qualified team members and Fosters greater employee retention
  - Hire from anywhere in the U.S. (I know...multi-state nexus. But...it's worth it!)
  - The ongoing economic impacts of COVID are still driving mass migration within the U.S.
  - A large percentage of the U.S. population remains concerned by (and/or particularly vulnerable to) COVID
  - Fosters strongly work-life harmonization – reducing the propensity for employee burnout\*
- Powerful tools emerged – accelerated by COVID – that make this model increasingly viable.



\*Note: The inverse may also be true. Monitor team productivity and workload heavily in virtual employment models

# Managing Documents in WFH Environments

Woodard Recommends

- Use company-managed cloud backup with utilities installed on each local workstation...and check regularly!
- Sync the PC's Desktop, Documents and Downloads folders to Cloud Storage Systems
- Use folder mapping for the remote folder storage locations
- Use a collaboration tool for document collaboration or integrate cloud store



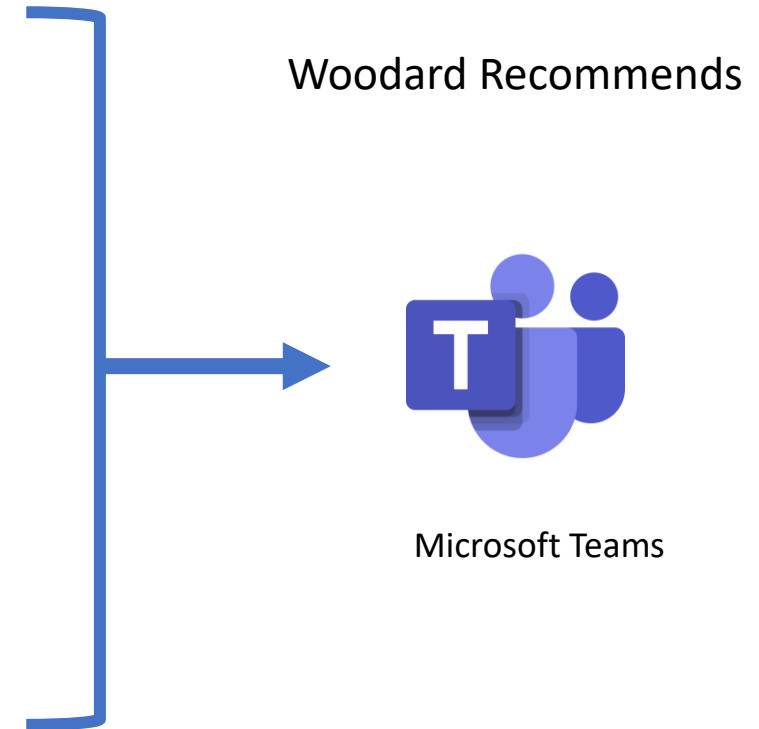
Microsoft OneDrive



Microsoft Teams

# Managing Communications in WFH Environments

- Use a collaborative solution
- Tag people to call attention to essential posts or requested information/responses
- Create company policies around the use of important and urgent tags
- Read through *all* posts for *all* channels/teams in which you are invited *every day*. This is your company's "newspaper."
- Have fun. Use GIFs, use a Water Cooler Conversations channel, tell jokes, etc.





# Managing Tasks in a WFH Environment

Woodard Recommends

Deploy a Task/Ticket Management Solution for administrative task as well as cyclical and non-cyclical client production tasks.

The logo for PIXIE, featuring the word "PIXIE" in a bold, red, sans-serif font.

# Managing Tasks in a WFH Environment

**PIXIE**

## CRM & Client Management

Pixie accounting client management software gives you one central place to manage all of your client relationships and communications.



## Task & Deadline Management

See how Pixie software helps you hit your deadlines, manage your to-do's and stay in control.



## Practice Management Software Accountants

Pixie offers everything you need to hit your deadlines manage your to-do's, and stay in control.



## Set up an email account for work & do more with Pixie!

Reduce email overwhelm and spend less time in your inbox too.



## Recurring Task Management Software for Accountants

Set tasks to create automatically and recur on a weekly, monthly, quarterly or annual basis.



## Accounting Automation

Use some simple automation in Pixie to save time and put your practice management on autopilot.

# Segment 3

Building a culture that empowers your team  
and reduces employee turnover



# 10 Ways to Build a Compelling Culture

1. Establish a vision, mission and purpose for the company and cast the vision regularly
2. Establish and strongly reinforce company values
3. Drive performance through measurements (with rewards) rather than oversight and supervision
4. Create a formal chart of roles and responsibilities and clearly communicate which team members are in which roles
5. Develop your team members. Conduct monthly team meetings (virtual works here) focused on proactive learnings, especially around professional and team interactions\*



\*Books written by Patrick Lencioni are a great resource for these meetings!

# 10 Ways to Build a Compelling Culture

6. Be generous with employee benefits (e.g., retirement plans, accidental medical riders, flexible spending accounts, and unlimited paid time off)
7. Evaluate perpetually: Be quick to confront and equally quick to move on
8. Splurge on a company-wide annual retreat to brainstorm around problems and innovations and to align on annual objectives and measurements
9. Meet often...but meet with efficiency and intention
10. Hire for culture fit and fire team members who are counter-cultural...even if they are high performing.



# Up Next...

## “Why Your Clients Don’t Value Your Services...and How to Change Their Thinking”

- Discover the 5 Ways to Shift Your Clients’ Thinking about Your Value
- Receive Joe Woodard’s Proven, 3-Tiered Model for Packaging and Pricing Bookkeeping and Tax Services
- Learn the 4 Step Communication Map for Getting the Clients to Agree to Your Desired Price
- ...and more!



See Registration Link in Your Chat Window

...or visit

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