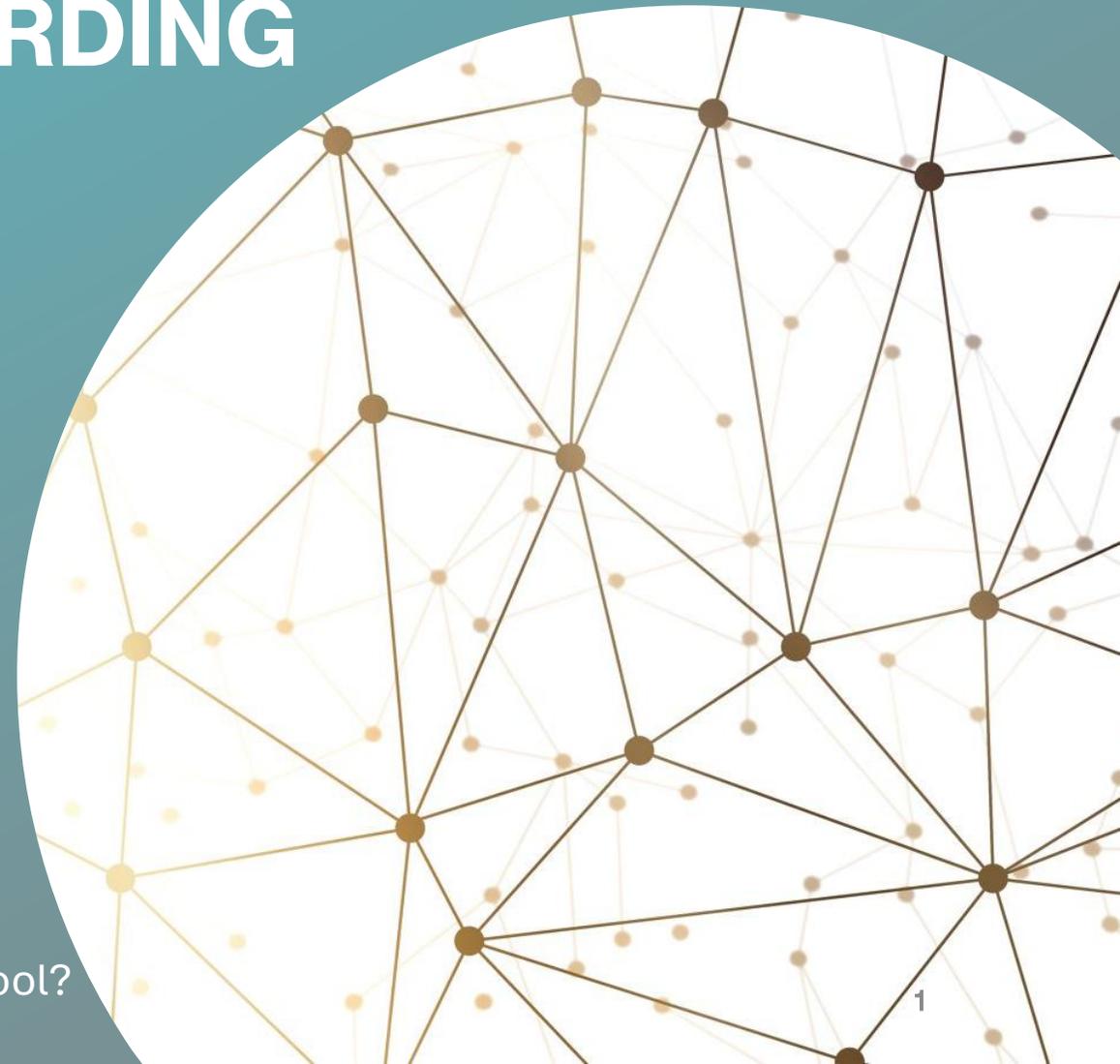


# + • ○ HIRE LEARNING: RECRUITING + ONBOARDING THAT ADD UP

Because finding the right fit  
shouldn't feel like an audit

Presented by Amy Boston, SHRM-CP, PAFM  
Threology

What if HR was your most powerful business growth tool?

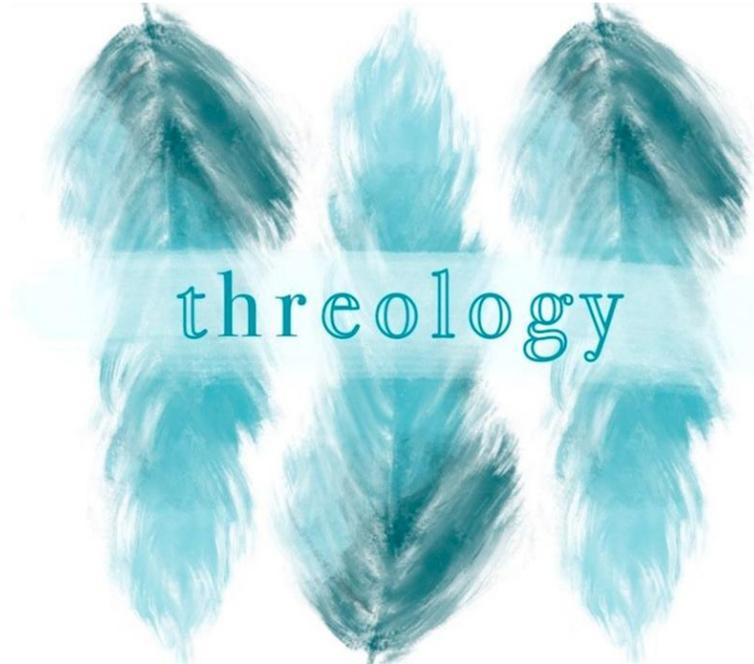


---

**AMY BOSTON,**  
SHRM-CP, PAFM  
CO-FOUNDER + CEO



We're on a mission to transform HR into a strategic advantage for Firm Administrators, Managing Partners, and Office Managers.



Threology is a Human Resources strategy and advisory firm dedicated to helping public accounting firms and small businesses thrive.

With over a decade in public accounting, Amy Boston has in-depth knowledge of the inner workings of public accounting firms. As a SHRM-CP and PAFM credential holder, she is poised to partner with you for your firm's most challenging strategy initiatives and overflow project work.



---

# LEARNING OBJECTIVES

- Understand recruiting challenges in public accounting
- Align hiring with firm culture and goals
- Identify strategies to attract top candidates
- Explore onboarding best practices
- Measure success through key recruiting and onboarding metrics

# THE TALENT EQUATION:

## WHY IS PUBLIC ACCOUNTING RECRUITING SO DIFFICULT?

Talent shortages in accounting

CPA candidate pipeline challenges

Big Firm Competition

Shifting expectations around flexibility

Generational differences surrounding purpose



# RECRUITING THAT ADDS UP:

## WAYS TO IMPROVE THE PROCESS

- Strengthen employer branding
- Structured recruiting
- “Outside the Box” approaches
- Pre-employment Assessments



---

## DISTINGUISH YOUR FIRM: DEEP POCKETS DON'T ALWAYS WIN

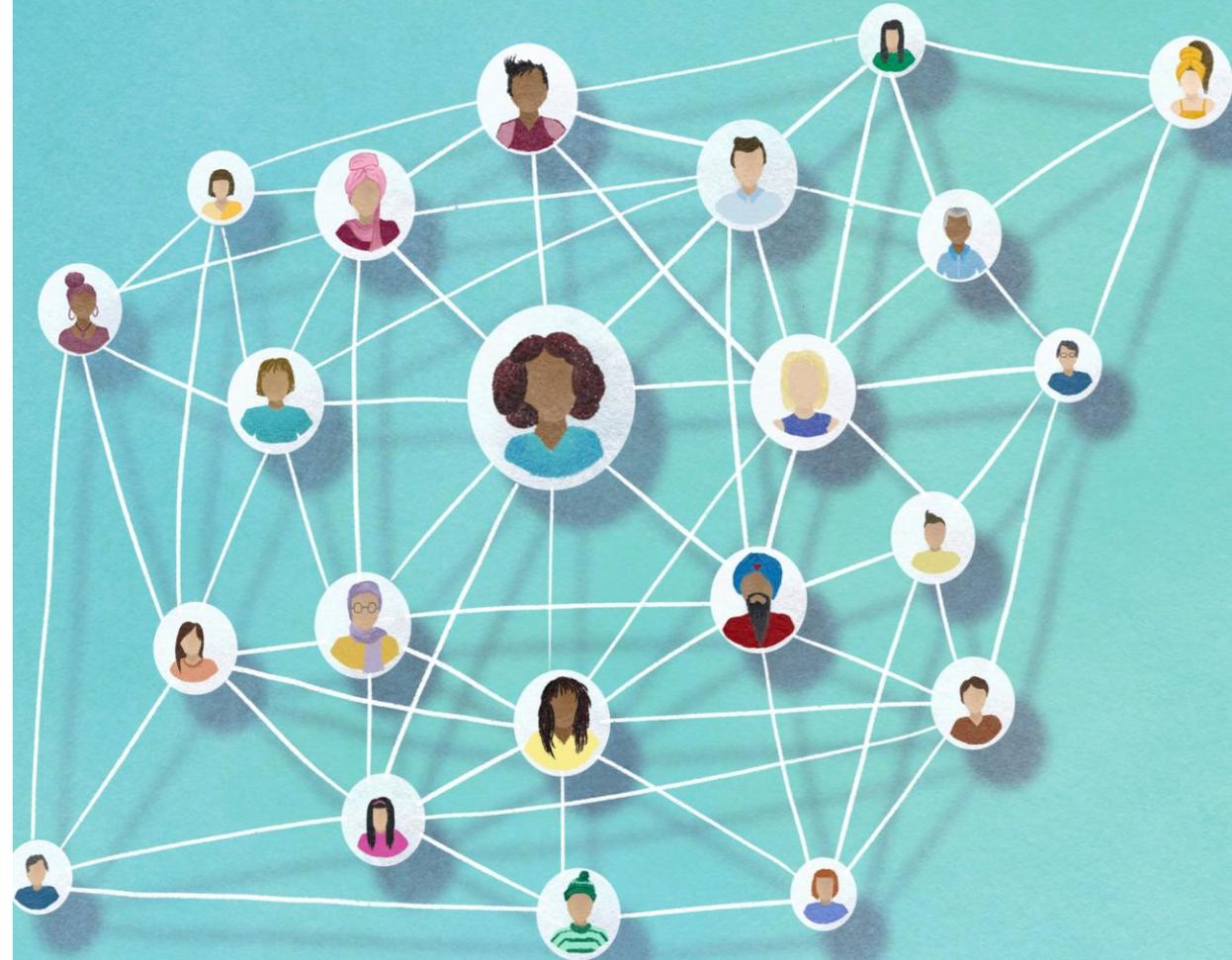
- How does your firm compete with these brands?
- What do you stand for?
- How are you different?
- Why should a candidate select your firm instead of Big 4?



---

# STRUCTURE IN RECRUITING: LEVERAGING SYSTEMS

- Applicant Tracking Systems
- Formalize the recruiting process
- Make it easy
- Shorten/streamline the process
- Outside recruiters



# OUTSIDE THE BOX: WINNING THE TALENT GAME DIFFERENTLY

- Start early
- College programs
- Leverage the team you have
- Employee referral programs
- Big firm shake up



---

## START EARLY: SENIORS ARE ALREADY TAKEN...

- Identify talent early
- “Freshman Impression”
- Shadow opportunities





## COLLEGE PROGRAMS: GET INVOLVED

- Accounting clubs
- Department heads
- Advisors
- Intern Program / University Day

---

# YOU HAVE A RECRUITING TEAM: YOU JUST DON'T KNOW IT YET

- Create opportunities
- Align with goals
- Year-round, continual efforts
- Teams for various events and needs





## REFERRAL PROGRAMS: “YOU BE THE RECRUITER”

- Keep it simple – for your employee and their referral
- Communicate often – don’t keep your employee or their referral in the dark
- Make the program exciting and market it!
- Provide a [valuable](#) incentive

---

# BIG FIRM SHAKE UPS: TAKE ADVANTAGE OF UNCERTAINTY

Laid-Off  
Talent

Escape from  
“Big Firm  
Mentality”

Uncertainty  
Creates  
Opportunity



# IMPROVE QUALITY OF HIRE: PRE-EMPLOYMENT ASSESSMENTS



**78%**

*the percentage of orgs that  
say pre-employment  
assessments improve  
quality of hire*

**accountests**



I highly recommend Accountests to any firm looking to improve its hiring process. The tests provided give us information that we cannot gather from an interview or a resume alone. It is a missing piece of the hiring process that has saved our firm thousands of dollars by preventing a mis-hire.

”

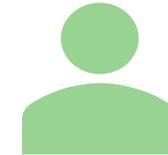
Stephanie Anderson EA, CTP - Tax Prose, Inc., CA

# YOUR ONBOARDING ACTION PLAN:

## BUILD A WINNING PROCESS



Document onboarding workflow



Assign ownership and roles



Use tech to automate admin tasks



Measure success

---

# DID YOU KNOW?

New hires decide within the first 90 days whether they'll stay long-term.

20% of turnover happens within the first 45 days.

Structured onboarding improves retention by up to 82%





---

## BEFORE THE 1<sup>ST</sup> DAY: FIRST IMPRESSIONS COUNT

- Pre-employment check-ins
- Tools, equipment, access, software
- Workspace set up for in office employees or equipment sent to remote employee
- Welcome email with first day details



## DAY 1: A LAUNCHPAD FOR SUCCESS

- Welcome message & agenda
- Introductions to key team members
- Workspace and tech ready
- Assign a mentor/buddy

---

# BEYOND WEEK ONE: ONBOARDING IS A JOURNEY

- 30-60-90 day milestones
- Role-specific training
- Regular manager and mentor check-ins
- Feedback loops



# RETENTION METRICS :



## MEASURE RETENTION TO PROTECT TALENT INVESTMENTS

### Key Metrics:

Voluntary Turnover Rate

First-Year Retention

Engagement & Stay Intent

Cost of Turnover

---

# TIME TO PRODUCTIVITY: ACCELERATING TIME TO FULL CONTRIBUTION

## Key Metrics:

Time to First Billable Hour

Time to Full Productivity

Ramp-Up Utilization Rate

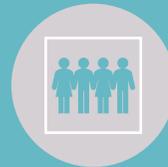
Supervisor Assessment





---

# BRINGING IT ALL TOGETHER



Recruiting Challenges →  
Know the obstacles firms face in today's talent market.



Attraction Strategies →  
Apply fresh, effective ways to reach top candidates.



Culture Alignment →  
Hire with your firm's values and goals in mind.



Onboarding Excellence →  
Build a process that engages and retains new hires.



Measure What Matters →  
Track metrics to ensure long-term recruiting success.

---

# Thank you!



Reach out if you have questions about today's topics or just to chat – I would love to connect!

[Amy Boston | LinkedIn](#)

[aboston@threology.com](mailto:aboston@threology.com)

[www.threology.com](http://www.threology.com)

---

# Are you the HR Department...

...and the IT guy,  
snack restocker,  
party planner, and  
unofficial therapist?

WE MADE  
threology  
JUST FOR YOU

TAILORED HR SUPPORT FOR  
FIRM ADMINISTRATORS &  
OFFICE MANAGERS

PROJECTS & ONGOING  
SUPPORT



*Handbook Development*  
*Firm Policies & Structure*  
*LMS and CPE Guidance*



*Compensation Strategy*  
*HRIS and Payroll Technology*  
*Campus Recruitment*



*Mentor Programs*  
*Intern Day Framework*  
*Job Descriptions*



*HR Training*  
*HR Department Development*  
*Recruiting*  
*Payroll Processing*

REAL HR EXPERIENCE

---

REAL HR SOLUTIONS

---

REAL HR RELIEF

---

**CPAFMA Members  
receive 10% off  
project work!**

[www.threology.com](http://www.threology.com)