

12 QUESTIONS TO ASK WHEN HIRING A BOOKKEEPER

Without sounding like alarmists, the fact is that hiring the wrong bookkeeper can destroy your business. Before choosing a company with whom to work, it is imperative to clearly define what you expect from your bookkeeper.

Choosing a company to assist you in maintaining your financial records is an important decision. At NALH, we want you to be confident in your choice and encourage our clients to ask questions. Below, we have compiled a list of questions - and our answers - that are important to ask - and have answered clearly - before you select a company to handle your accounting and bookkeeping needs.

WHAT TO ASK ABOUT THE COMPANY

1. **How long has the company been in business and how many clients does it serve?**

NALH has been in business for over 27 years and has an active client roster of nearly 200 companies.

2. **What is the size of the firm's average client?**

Asking this question will help determine what size business the bookkeeper is most experienced in dealing with.

Over the years, NALH has had the opportunity to work with companies of all shapes and sizes - from 2 employees to 200. Each business is unique and our systems are tailored to each company's specific requirements.

3. **Does the company specialize in working with specific types of businesses or industries?**

NALH has had the opportunity to work with companies in a diverse range of industries and specialties - from language schools, video and film production, biotech, transport and a host of others.

4. **Is the company a full-time business for the vendor or a side job?**

Depending on your needs, you'll either be comfortable with someone who is only available part time or you'll need someone who is committed to providing bookkeeping services full-time.

NALH is strictly a bookkeeping organization and has earned a reputation for using the right combination of people skills and technology to provide professional bookkeeping services, support and training.

5. **Can the company provide contact information for existing clients with whom they work?**

NALH is happy to provide any prospective client with contact information for current customers who will be more than happy to provide you with feedback on their experience in working with us. In contacting referrals from bookkeepers, you may want to ask:

- How long have you been working with your bookkeeper service?
- Does the company complete the work accurately and on time?
- What value-added services do they provide?
- If unavailable when you call, do they get back to you in a timely manner?
- Are you able to reach them 90% of the time?

- 6. Does the company offer the opportunity to visit their office to tour the facility and meet the staff?**
NALH is happy to have prospective clients visit our office and meet our staff. All of our team members are friendly and approachable and you will have the chance to observe how we handle each individual client effectively. Our internal procedures provide a consistent system on how we handle each client individually effectively. We have specific templates customized to be able to consistently move paper and files efficiently and effectively. Look for this when you visit your potential bookkeeping service. Please feel free to contact us to schedule a visit to our office.
- 7. Is the company a single person operation or do they employ support staff?**
At NALH, we have an infrastructure of numerous accounting technicians so that you are not left in chaos if your technician gets sick, takes holidays, or finds a better opportunity. With a stable background of 27+ years in business, you can rest assured that we will always be available.

WHAT TO ASK ABOUT PROCEDURE & WORKFLOW

- 8. What is your procedure for checking work before it goes out?**
It is important to find out if the bookkeeper has any procedures for checking their work or follows any type procedures, to be on a consistent basis. At NALH, our procedures are applied consistently, whether the task be handling petty cash or GST filing.
- 9. How is filing handled? What does the company present to you upon completion?**
If you prefer not to spend time doing your own accounting software data entry, you may also prefer to leave filing to your bookkeeper as well. You may simply want to have all your information prepared and returned to you in a manner that allows for easy storage and quick accessibility when needed.

NALH can remind you when your instalments are due, calculate the payments and remit your cheques.

- 10. How much does the company charge? What is included? Are there extra charges for filing, folders, pick-up and delivery?**

Before engaging a company, it's crucial to find out how their fees are calculated. Will the bookkeeper charge you for every phone discussion? To avoid friction later, it is essential to discuss the bookkeeper's fee structure. If the bookkeeper uses a time-based system, discuss the hourly rate of the bookkeeper and staff.

NALH offers competitive rates for both on-site and off-site services. We would be happy to answer any questions you may have about our services and fee structure.

Please feel free to contact us at: info@nalh.ca or 604-412-3885.

WHAT TO ASK ABOUT TECHNOLOGY & SECURITY

11. **What kind of software is used and how is my data stored?**

A good bookkeeper should use the right software to keep and process your financial data - ie: Windows or Web-based instead of DOS; industry-standard legal accounting software instead of Excel spreadsheets.

NALH provides a full range of bookkeeping services using QuickBooks, SimplyAccounting, MYOB and other accounting software, helping clients assess expenditures and prepare electronic books for quarterly and year-end accounting requirements.

NALH has worked with Fully Managed, based in Vancouver, BC, to establish a solid network structure to house and secure all of our client data. Fully Managed implemented a network server that is maintained on a regular basis. To ensure NALH always has the most current data secured, our server is backed up daily.

12. **What security and privacy measures are utilized to preserve the confidentiality of financial information?**

Maintaining the privacy and security of sensitive financial information is important to every business. NALH's team members treat all client information with respect and care and consider all information provided to us by our clients as confidential.

TAKE THE NEXT STEP TOWARDS GROWTH FOR YOUR BUSINESS

NALH would be pleased to answer any questions you may have about how our services might benefit you and address your company's specific needs.

Please visit our web site at: www.nalh.ca or contact our office at 604-412-3885 or info@nalh.ca.

We look forward to working with you soon.

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