



Top Ten Wins In Accounting Department

People and Mindset

1. **Quality is Better than Quantity:** We reduced the amount of accounting staff and an entire level of management and actually got more accomplished as those remaining had greater synergy and trust.
2. **Hire for Integrity First:** Warren Buffett Quote.....
“Somebody once said that in looking for people to hire, you look for three qualities: integrity, intelligence, and energy. And if you don't have the first, the other two will kill you. You think about it; it's true. If you hire somebody without [integrity], you really want them to be dumb and lazy.”
3. **Kill Your Own Ideas:** What was a good idea and successful five years ago, may now be holding you back. Be willing to get rid of the structures you once created.
4. **Use of Consultants:** They are good at telling you how to kill your own ideas and create new ones. Many times they can help you sell a new controversial idea to management and the board of directors that you may have struggled to sell on your own.
5. **Peer Information is Free:** This is not Google or Apple, we can learn from peer organizations for free. Understanding benchmarks and what other orgs are accomplishing with similar resources is very valuable.

Structures and Technology

6. **PTO Structure and Flexibility:** Understanding that the non-profit sector pays less, providing the value add of flexible time off will help attract and retain talent.
7. **Shared Services:** Moved to have all common services across four offices be with the same vendor and paid out of parent organization to promote transparency and save resources.
8. **SBI and Salesforce:** Transitioning all pipeline management and household level data to CRM. This takes a lot of time and can be painful but the benefits are huge.
9. **Centralized Payment Processing:** Made shift for all payment requests to accounting use the same forms and centralized portals. This was long overdue as managing for four offices and separate processes was no longer sustainable. Politically, creating a new process is better than choosing a best of breed.
10. **Simple Centralized Reporting:** Made shift to provide quarterly financial reports and monthly production reports to all staff using the same communication flows. Reports are simple enough to support decision making for all.