MANAGING A GROWING TEAM EFFECTIVELY
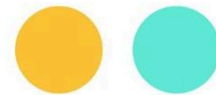
Module 4: Operational Excellence and Scaling Up

Managing a Growing Team Workbook

This workbook is designed to help you evaluate and improve how you manage a growing team in your accounting firm. By completing the tasks and exercises, you'll develop a clear, actionable plan to build a well-structured, high-performing team that can scale sustainably with your business.

Instructions

Before You Begin

- **Reflect on Your Current Team Structure**: Consider how your team is organized, how work is delegated, and how well your current setup supports performance, communication, and morale.
- **Identify Weak Spots**: Are there inefficiencies, unclear responsibilities, or engagement issues? Where does team performance or collaboration break down?
- **Gather Insights**: Use any existing tools, feedback, or performance data to inform your starting point (e.g., KPIs, exit interviews, capacity reports).

While Completing the Workbook

- **Be Honest and Specific**: Accurately reflect on what's working—and what's not—in your current team setup, leadership style, and systems.
- **Think Practically**: Prioritise actions that will directly improve team effectiveness, reduce friction, and free up your time to focus on growth.
- **Plan for Your Firm's Reality**: Tailor your decisions and goals based on your team's size, experience levels, and the services you offer.

After Completing the Workbook

- **Take Action**: Start implementing the most urgent or high-impact improvements, whether it's redefining roles, upgrading tools, or improving onboarding.
- **Monitor Progress**: Track metrics like workload balance, performance consistency, employee retention, and internal feedback to assess results.
- **Review and Evolve**: Revisit your plan regularly to ensure it adapts as your team grows, your firm's services expand, or your goals shift.

By following this structured approach, you'll build a stronger internal foundation—one where your team is empowered, efficient, and aligned with the firm's long-term success. A well-managed team doesn't just support growth—it makes it possible.
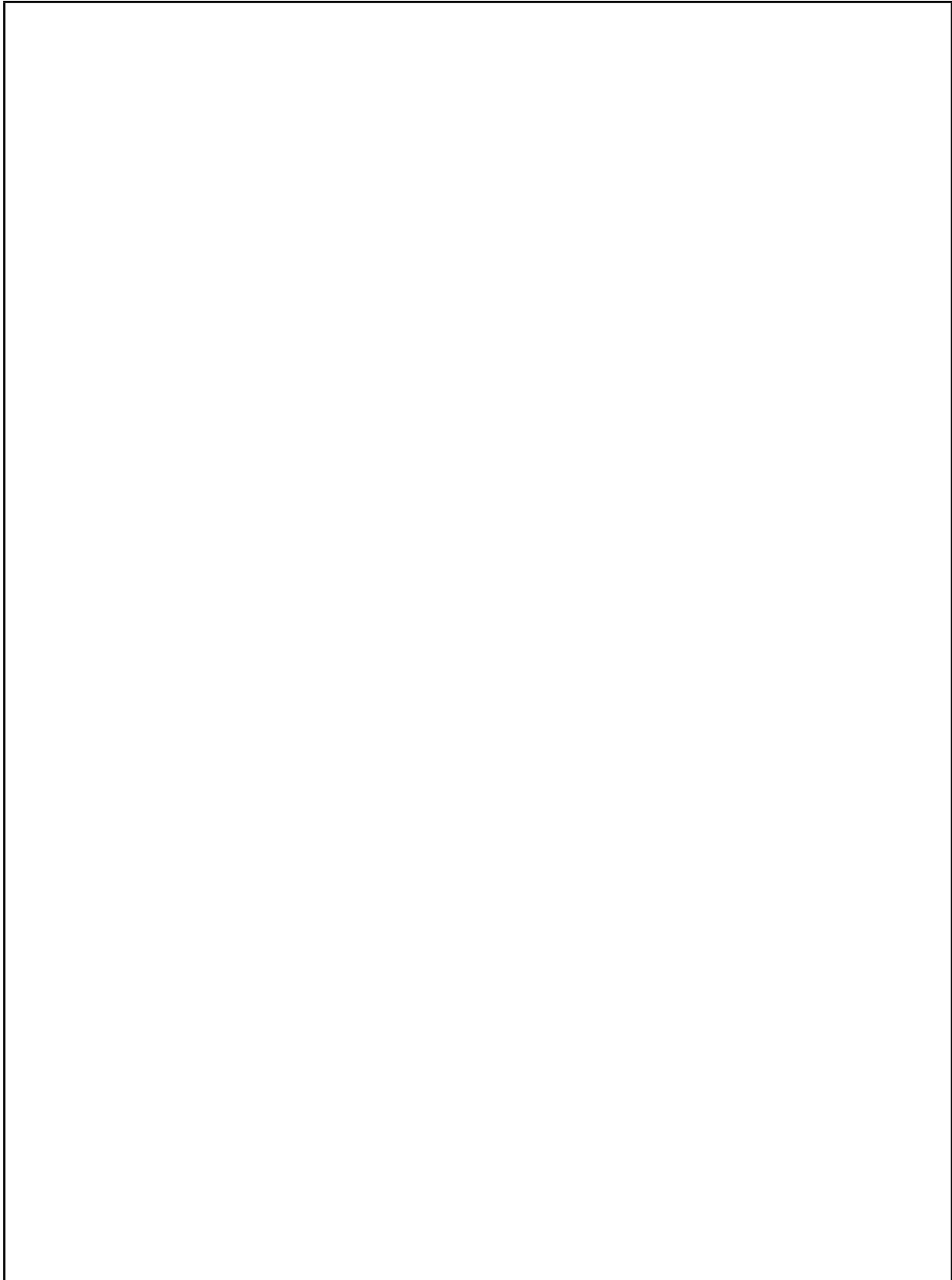
Join the Unstoppable Newsletter for more updates, tips and content to learn how to start, build and scale your accountancy firm.

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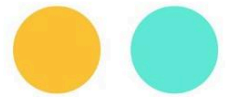
Task: List all current key team members/roles and their core responsibilities:

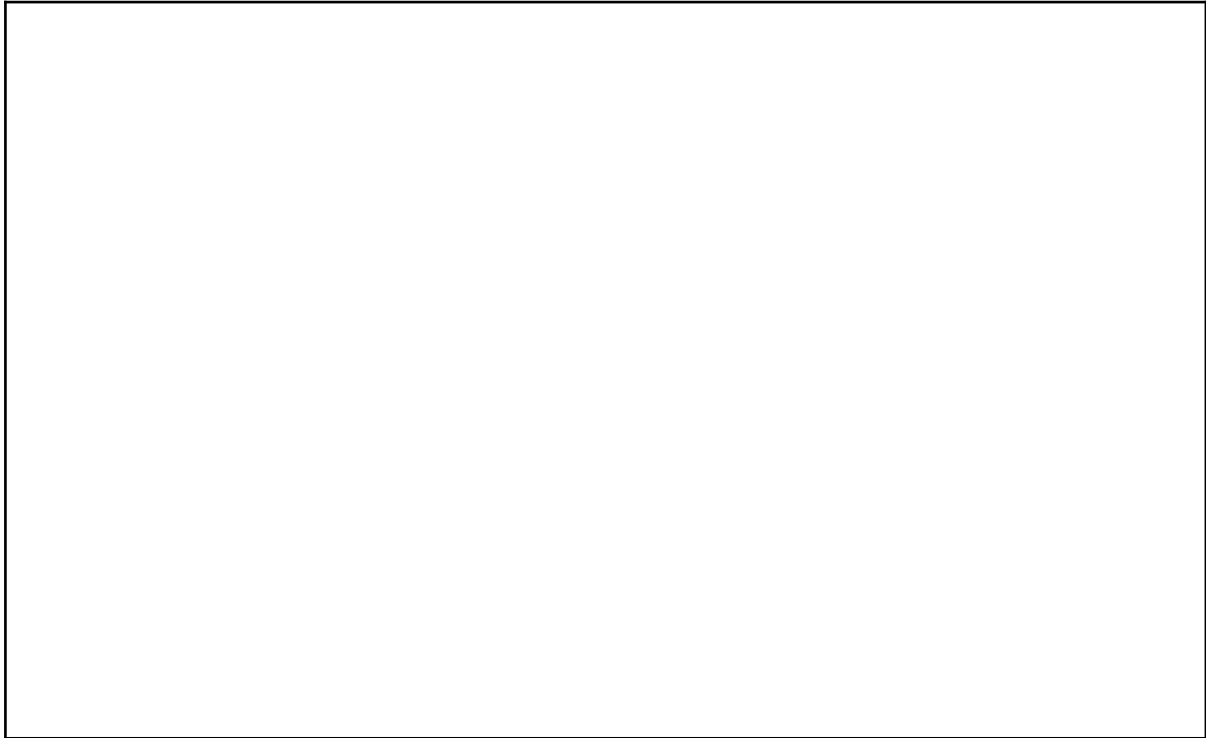**Task:** Where do you see overlapping duties or blurred ownership?

Task: Are there any critical tasks you or other senior level staff are still personally involved in that should be delegated?
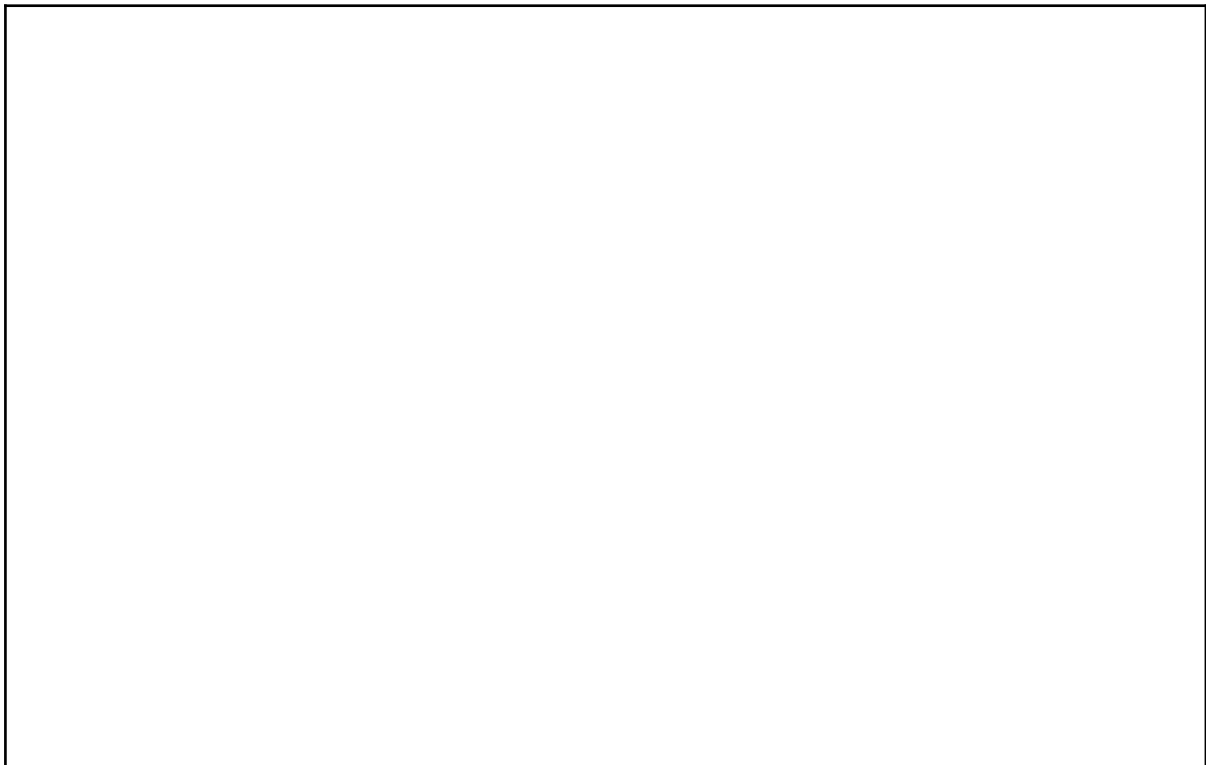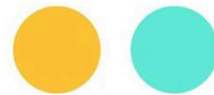
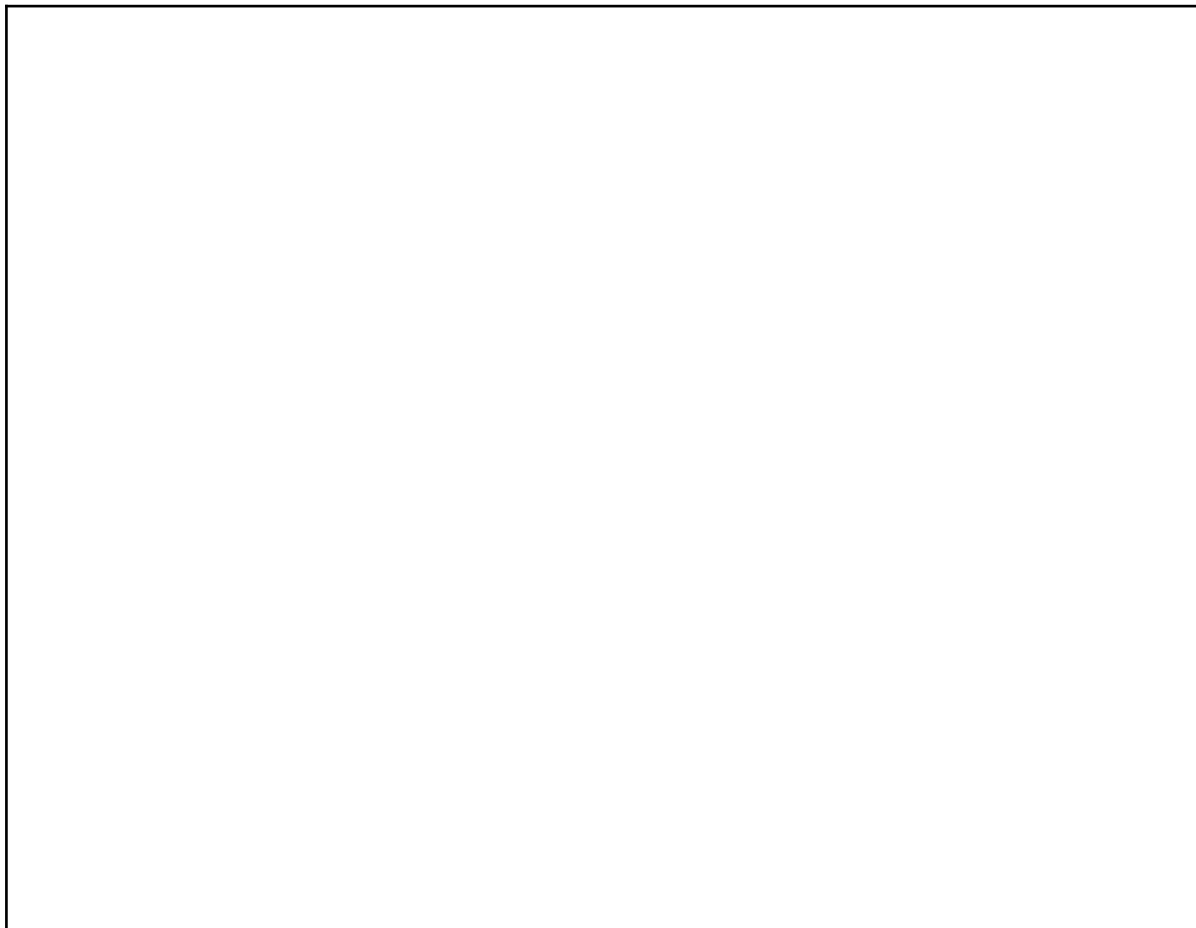**Task:** Who reports to whom? Sketch or describe your team's reporting structure:

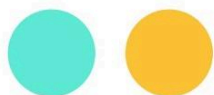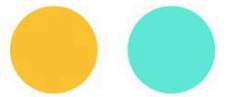**Task:** Which roles are missing or under-supported based on your firm's current service needs?

Section 2: Define and Improve Your Core Processes

Task: Choose one service (e.g. bookkeeping, year-end accounts). Write down the steps your team currently follows to complete it:
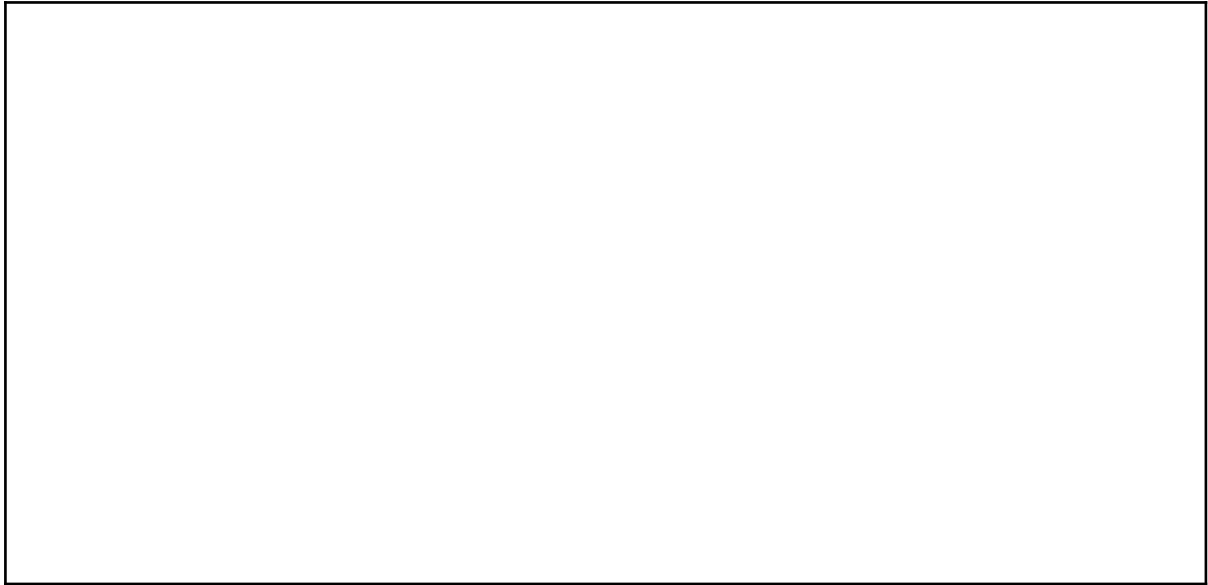
Task: What steps are often missed, inconsistent, or done differently by different team members?

Task: What supporting documents, checklists, or templates do you need to standardize this process?

Task: Describe how work is reviewed before it reaches the client. Is this process formalized?

Section 3: Strengthen Communication and Collaboration

Task: What tools are currently used to communicate across the team (e.g. Slack, Teams, Zoom)?

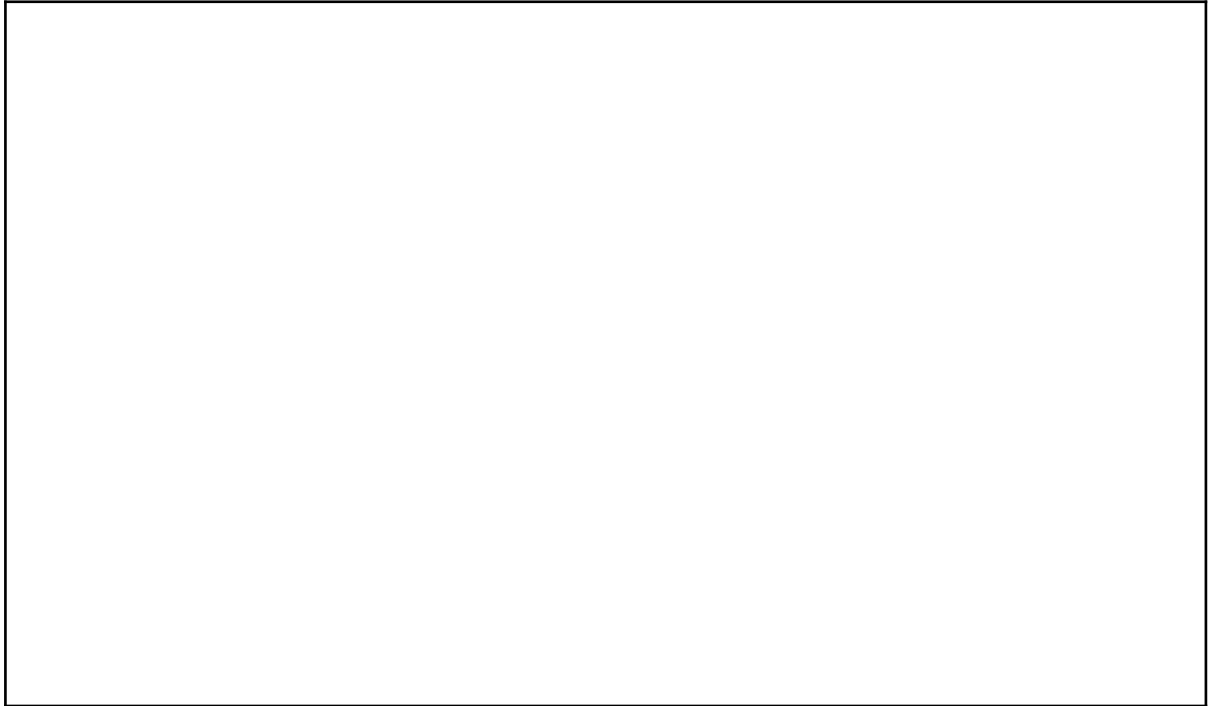**Task:** Are these tools working well? What's causing friction or confusion?

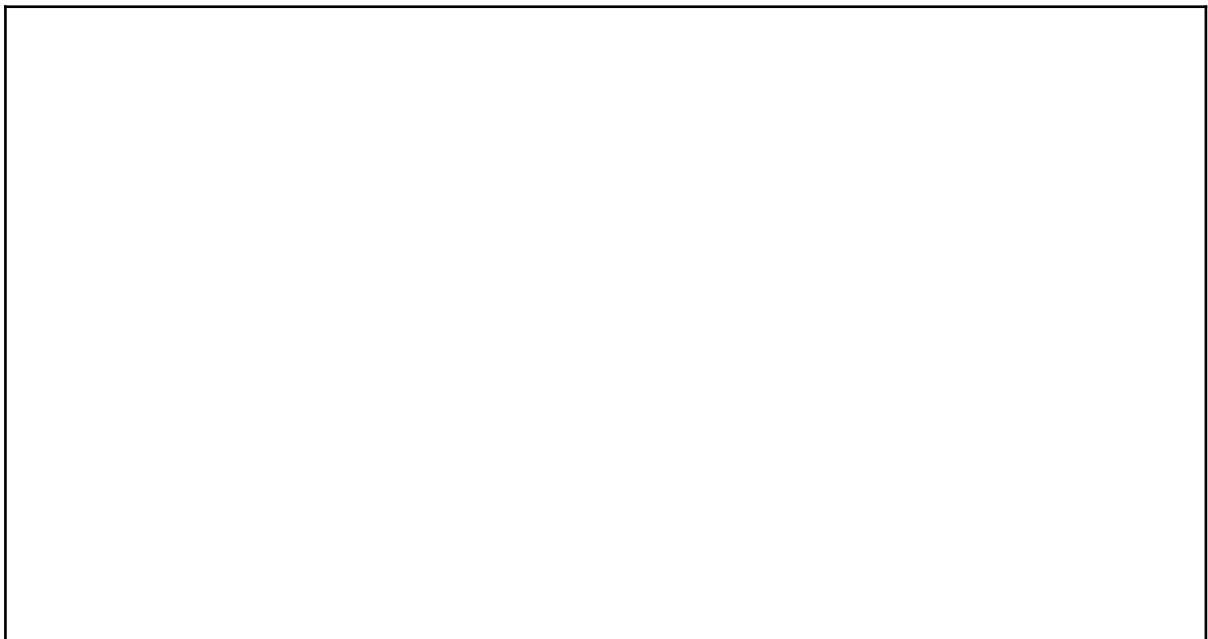**Task:** How often do you meet as a team? What could improve the value of those meetings?
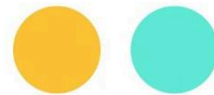
Task: Describe a recent communication breakdown or delay. What caused it? How could it have been avoided?
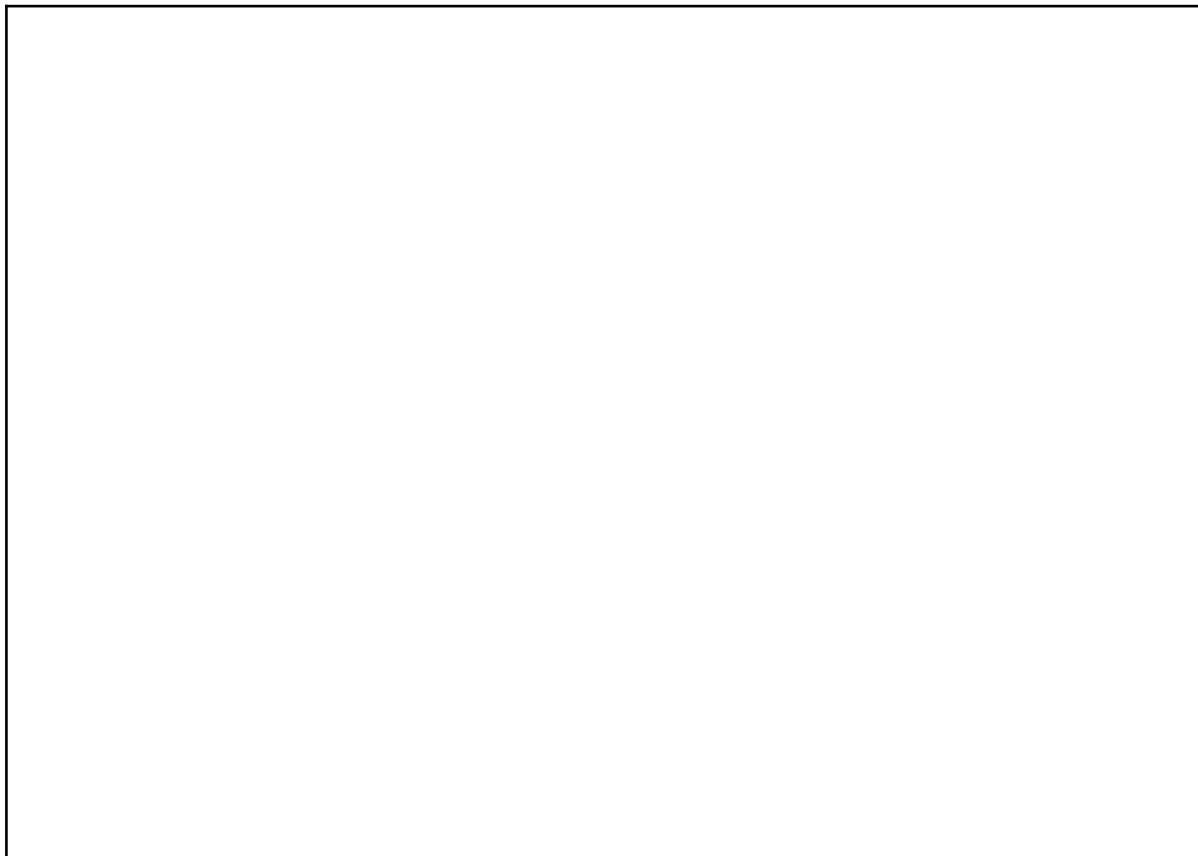
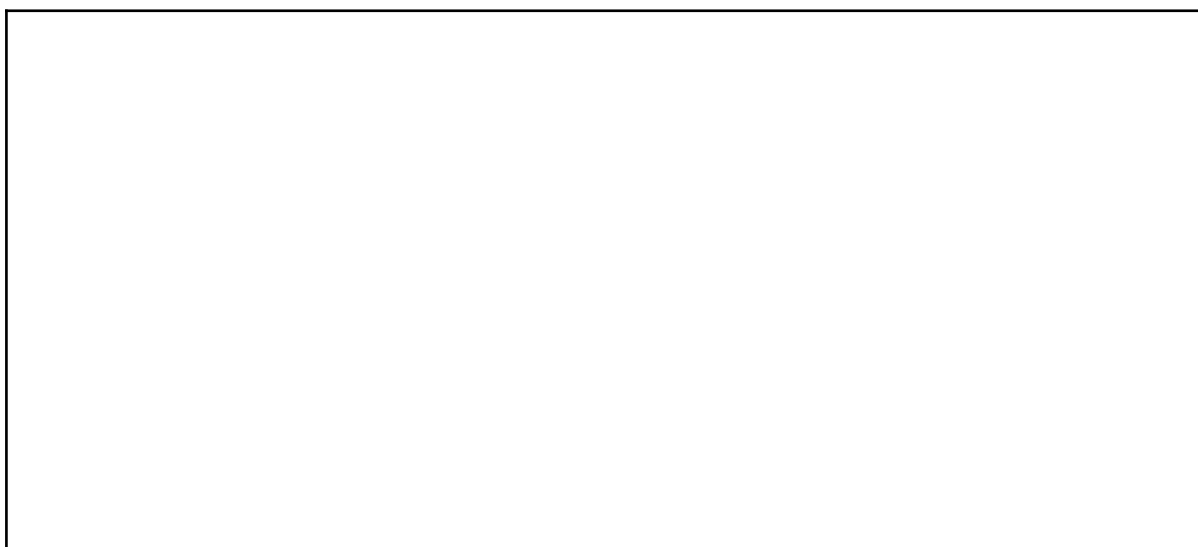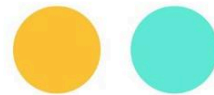**Task:** How do team members escalate issues or ask for help? Is this clear and accessible?

Section 4: Set Expectations and Measure Performance

Task: Choose one role in your firm. Describe what success looks like in that role:

Task: List 2–3 clear, measurable results or behaviors you want from this role consistently.
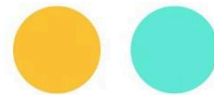
Task: How will you measure these outcomes and communicate performance expectations?

Task: How frequently will you conduct check-ins or reviews for this role?

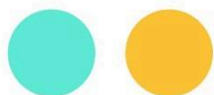**Task:** How do you currently handle underperformance, and what could you improve?
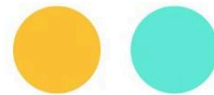
Section 5: Plan for Career Growth and Retention

Task: Choose one team member. What is their current role and desired growth path?

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Task: What specific skills or training would help them advance?

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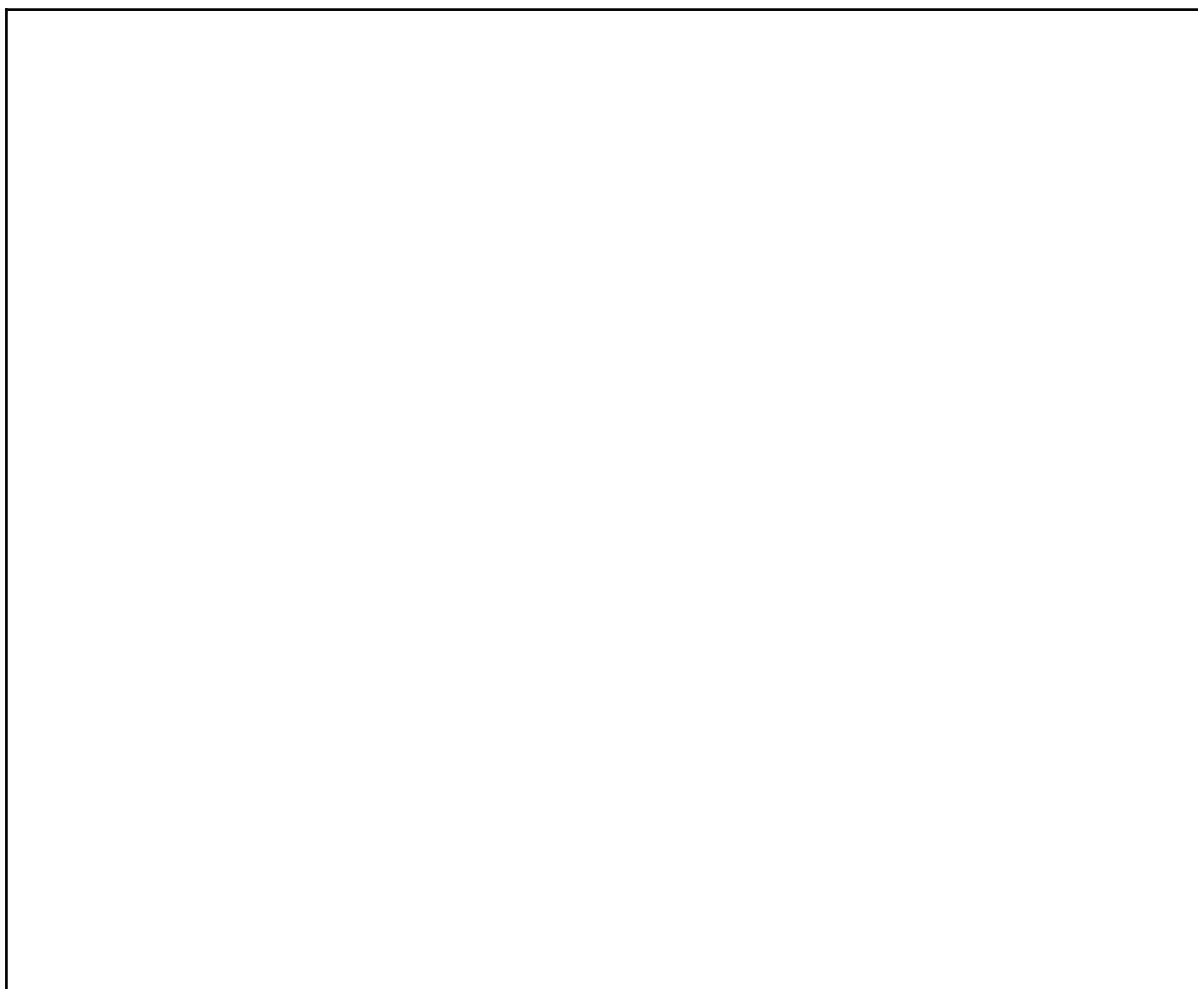**Task:** How can you support their development in the next 3–6 months?

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Task: How are you currently recognizing high performance? Is it consistent and meaningful?

Task: What motivates your team beyond salary? Write down ideas for improving work-life balance, purpose, or team culture.
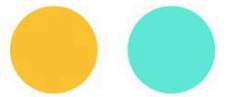
Section 6: Delegate and Build a Leadership Bench

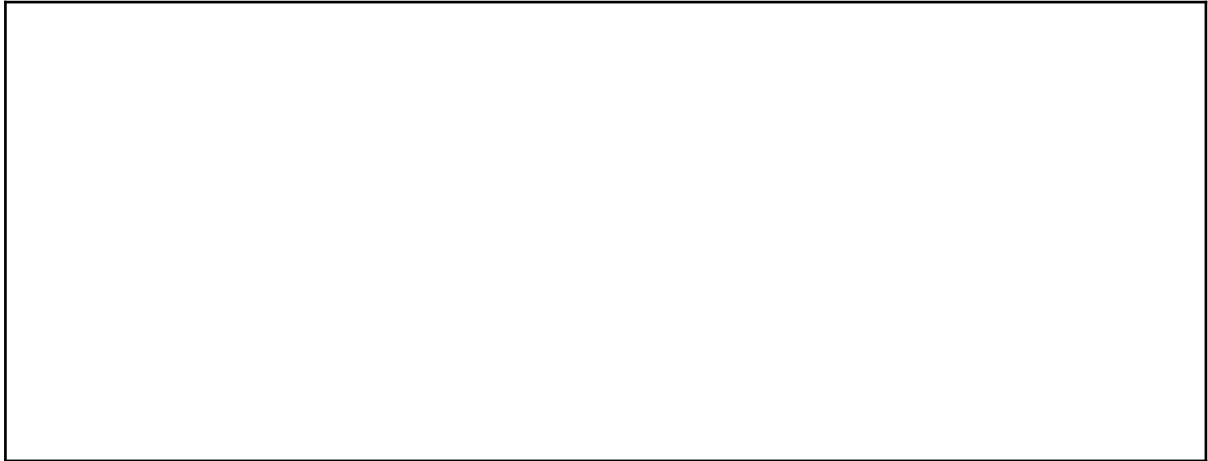**Task:** Write down three responsibilities or tasks you need to delegate soon:

Task: Who on your team is best positioned to take on each of these?

Task: What training, documentation, or coaching would they need to succeed?
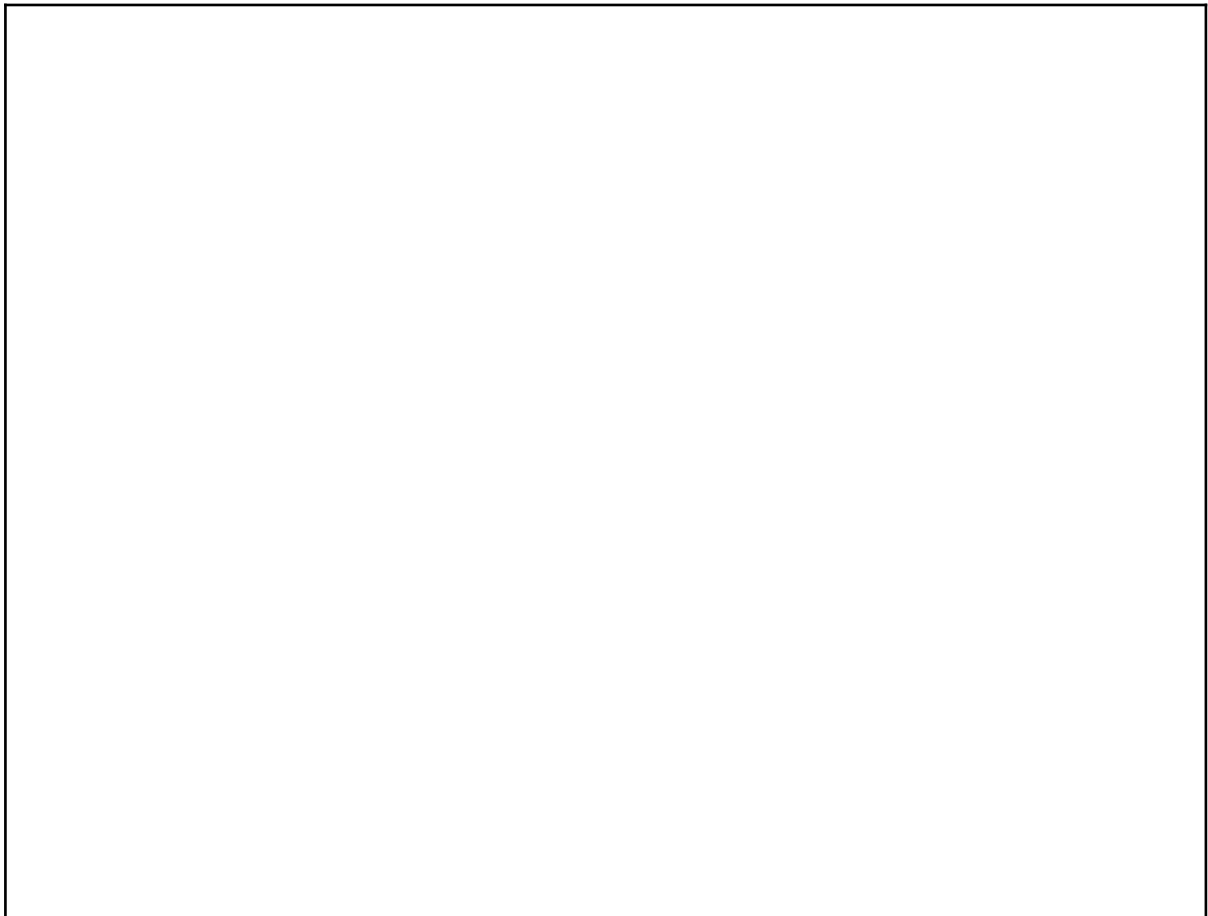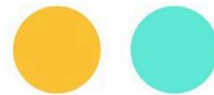
Task: What signs will you look for to ensure they're ready to lead others?

Task: What leadership qualities do you want to develop in yourself over the next quarter?

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Section 7: Design an Effective Onboarding Process

Task: When a new hire joins, what's the first impression they currently get of your firm? What do you want it to be?
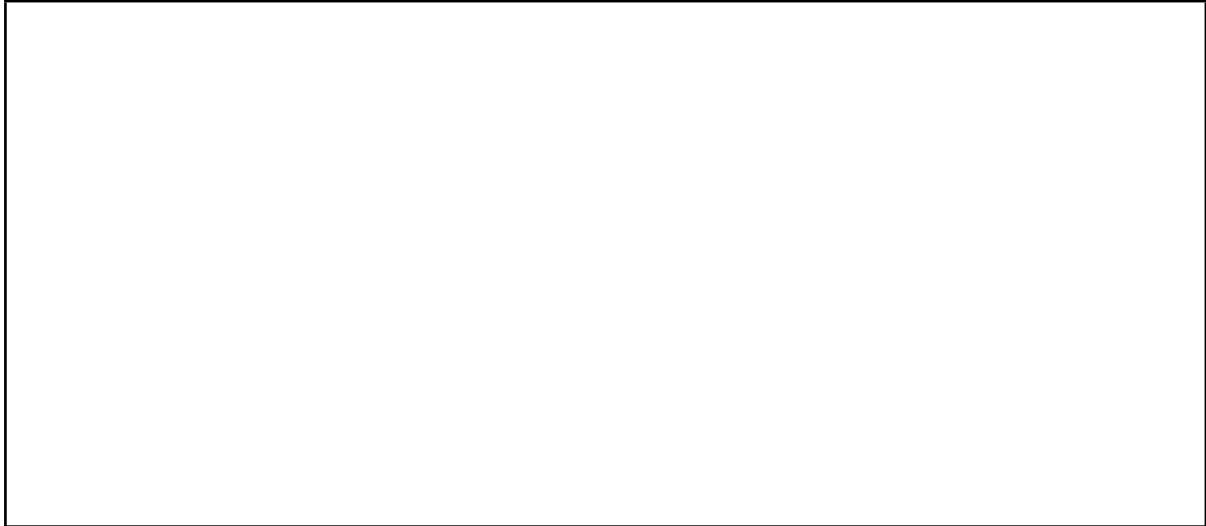
Task: List the steps a new team member currently goes through in their first week. Where are the gaps or inconsistencies?

Task: What tools, documents, or systems should every new hire be trained on in the first 30 days?
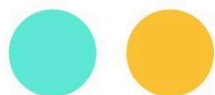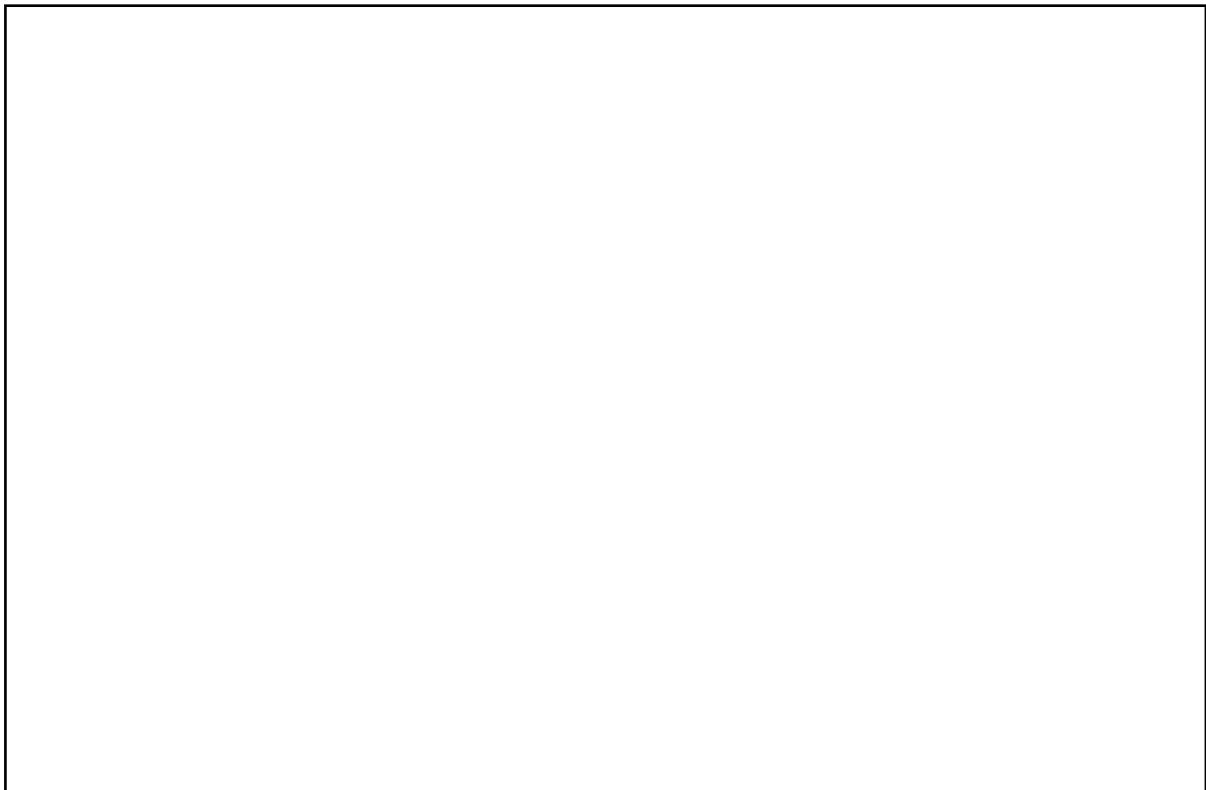
Task: Who will be responsible for onboarding and supporting each new hire? What check-ins should be scheduled?

Task: Write down the key milestones you want a new hire to reach by Day 30, Day 60, and Day 90.

Congratulations on Completing Your *Managing a Growing Team* Workbook!

🔄 What to Do Next

- **Review Your Insights:** Look back at the notes and reflections you've captured. What have you learned about how your team is currently structured and managed? Identify the key pain points—whether it's delegation, communication, leadership gaps, or unclear responsibilities.
- **Define Your Next Steps:** Based on what you uncovered, outline the concrete actions you'll take to strengthen your team. For example, if task ownership is unclear, you might introduce role-specific checklists or assign team leads for service areas.
- **Set Goals and Timelines:** Turn your insights into measurable goals. Whether it's reducing team turnover, improving project turnaround times, or onboarding a new hire more efficiently, define what success looks like—and by when you want to achieve it.
- **Integrate Changes into Daily Operations:** Embed your improvements into your firm's broader strategy. Communicate clearly with your team, delegate responsibilities, and ensure everyone understands their role in supporting the next phase of growth.
- **Monitor and Adapt:** Use internal KPIs—such as staff utilization, workflow bottlenecks, or performance review outcomes—to track your progress. Be prepared to make adjustments as your team, services, or client demands evolve.
- **Commit to Ongoing Team Development:** Effective team management isn't a one-time project. Revisit this workbook regularly to reflect, recalibrate, and build on your progress. As your team grows, your leadership and systems must grow with it.

🧭 Final Thoughts

By acting on the insights from this workbook, you're laying the foundation for a more structured, empowered, and scalable team. Great teams don't just make the work easier—they unlock your firm's true growth potential. Keep investing in your people, your processes, and your leadership. That's how sustainable success is built.
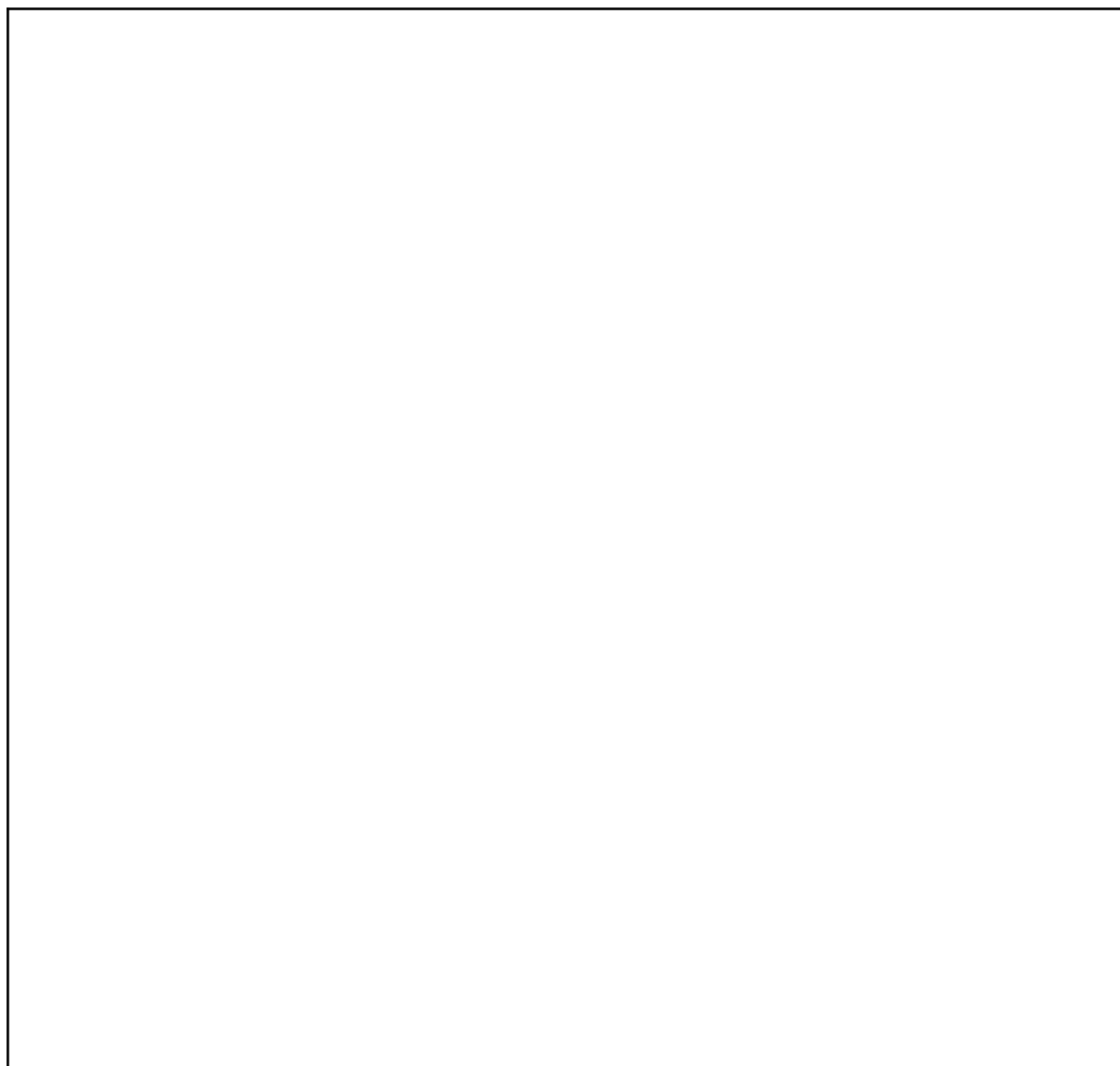
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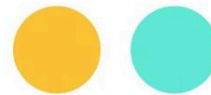
Additional Notes

Please use this section to fill in the most important points and any other notes or ideas you have about your Growth Action Plan.