

Four questions to ask local bookkeepers before hiring

Description

When you hire a bookkeeper, you are hiring your right-hand person. You donâ??t just need someone whoâ??s good with numbers, you need a financial partner. The ones doing your bookkeeping services will know the exact financial situation of your business, which is why you need someone trustworthy. Of course that there are several elements that you should take into consideration when looking to hire local bookkeepers. This article walks you through the four main questions that you want to ask before hiring. This technique ensures that you will work with the best professionals out there.

Experience In Your Industry

While your local bookkeepers will probably be able to handle the finances of your business anyway, itâ??s best to ask if they have experience with businesses similar to yours. This will help them be already familiar with the expenses that are deductible for your business, or what the compliance regulations are. Every industry has nuances, and someone with previous experience wonâ??t have to learn those nuances by risking the financial health of your business.

But, as already mentioned, an agency offering professional bookkeeping services will make sure that they can handle the project before working for you.

Itâ??s also worth mentioning that they cannot have experience if no one gives them an opportunity. So, if they donâ??t have experience in your industry, make sure that they at least have a lot of experience when it comes to bookkeeping in general. Ask them about their experience, what industry theyâ??ve worked with before, or if they serve any other businesses in your area. Donâ??t forget to check their website or Google reviews for testimonials. This information will help you understand if they are actually providing the professional bookkeeping services that you are looking for.

Do They Use Accounting Software?

The second thing you want to ask is if they are using accounting software. If they say â??Sayâ?•, you are on a good path. Accounting software programs exist to ensure that all of your financial data is recorded as accurately as possible. They allow your local bookkeepers to automate certain repetitive tasks, which makes everything faster and, again, more accurate. The fact that they are using software will facilitate your collaboration.

Software programs like QuickBooks allow multiple users to access the account at the same time. This means that both you and the bookkeeper can access it.



The use of an accounting software program by those providing you with bookkeeping services tells you that they will offer high-quality services. Your collaboration will be easier and more transparent. While manual bookkeeping does the job, itâ??s more prone to error and it takes longer.

A software program also gives you real-time reports, and it allows you to track expenses no matter where you are, as long as you have a connection to the internet. Your data will also be backed up, so that you wonâ??t have to ever deal with misplaced receipts ever again.

Ask Them How They Ensure Accuracy?

This is the third question youâ??d want to ask your local bookkeepers before deciding which one to hire. The first green flag is that they use accounting software. As already mentioned, because the software allows them to automate tasks, the risk of human error is decreasing. Moreover, this type of software allows for collaboration with your bank, for a more accurate track of your income and expenses. But, they should use other methods too. As an example,

double-entry bookkeeping is a method that is used for accuracy. Itâ??s when every transaction is recorded in two different places. Ask them about their recording and verification process.

Sneak in another little question and ask about the way they ensure that your data is secure. We are talking about important information that you wouldnâ??t want spread all over the internet. If they donâ??t use encrypted systems, secure platforms or strong passwords, you might want to look somewhere else. The care and importance with which they treat your data show you if they are actually professional. To put it simply, they should treat your financial data with as much care as a bank would. But whatâ??s the last question to ask?

Whatâ??s The Method and Frequency of Communication?

Efficient communication between you and those providing your bookkeeping services is essential. Clear and regular communication allows you to always be up to date when it comes to the financial situation of your business. All bookkeepers work differently. Some will report to you monthly, others will report every few months, and others will only report when itâ??s tax season. You need to choose depending on what you want for your business. Of course that the best idea would be to see reports as often as possible. Many business owners opt for a monthly report.



You also want to ask if they will help you understand the data, or just provide a report. Will they bring it to your attention when you have cash flow problems? You might not know how

to interpret numbers, so you will need some help with that. Getting all of these out of the way saves you from awkward situations that might arise later. This also allows you to decide if you are willing to pay the asked price for the services you will later receive. Find someone you can actually collaborate and communicate with for the best results.

Conclusion

Before you decide on the local bookkeepers you want to work with, you should ask them a few questions. Itâ??s essential that the professionals you choose have experience and expertise. If they have experience in your industry itâ??s even better. Ask if they use professional accounting software, as this ensures accuracy and better financial reports.

Donâ??t forget to ask about the way they plan to communicate with you, and try to explain the way you would like information communicated to you. And, last but not least, you need to get along well. Remember that you will work together for the well-being of your business.

Category

1. Finance
2. Legal / Administrative

Tags

1. Accounting
2. Financial Software
3. Accounting & Tax Services

Date
11/24/2026
Author
huubster