Accounting firm XYZ - Queen Bee Role (QBR)

Brand Promise – We will make you more money without you having to do more work.

QBR- Level 11 communication

What does this mean?
- Bookkeepers to complete all monthly tasks in order for the owner to do a final review of client financials.
- Bookkeepers will communicate with clients to make sure all info is accurate.
- Owner can then review with the client and help them become more profitable.

What does this look like?
- Accurately and timely completing monthly reconciliations, and problem solving
- Frequent communication with the client
- Quarterly client meetings to assess financial health
- The clients rarely have to come to us for questions, because they are always given the information proactively

What does this NOT look like?
- Reaching out to the owner for every question and problem.
- Learning to problem solve within the team together.

Directly serving the QBR is - (If you’re actively serving the role)
- Facilitating Client meetings
- Communicating with clients about what is needed
- Making suggestions to improve the clients financial health

Indirectly support and Protect the QBR is: (Team Members who run the rest of the business so the QBR can happen)
- Using resources to answer our own questions
- Copying Julie on emails to keep her in the loop
- Problem solving within the team
- Streamlining processes for efficiencies
- Completing tasks on time
- Cross training
- Keep in contact with clients for good communication
- Communicate to Julie any client issues.