

Hiring Guide

A guide to hiring in a virtual accounting firm.





About This Guide

At Summit CPA, we take hiring seriously. Being a distributed company, we receive a lot of applications from people who want to work remotely. Last year we received over 2,500 resumes, 40% of which were from qualified candidates. Because we are not restricted to our physical location when it comes to hiring, we have the benefit of being able to pick the best of the best, regardless of their location.

We believe that hiring the right people is one of the biggest keys to success for any business. This guide is designed to give you a high-level overview of the hiring process we use at Summit CPA. We'll cover what recruiting software we use, what we look for in potential new employees, and we'll provide a number of sample interview questions to help get you started.

Utilize Recruiting Software



Workable is a standalone applicant tracking system that helps us find and hire the right people. The program replaces email and spreadsheets with a simple way of advertising jobs, receiving applications, filtering them, setting up interviews and making great hires. We use Workable to manage every aspect of the recruiting stage.

Our approach to hiring is to have an **ongoing open application system** where we accept employment applications at any time, even when we're not actively hiring. We let applicants know when we're not actively hiring, and we tell them that we will reach out to them when we are. This way, whenever we are ready to grow our team, we have a steady pool of qualified applicants that we choose from.

For more information about the tools we use, check out our **Tech Stack Guide: www.summitcpa.net/tech-stack.*

Hire for Your Core Values

The most important thing you can do when it comes to hiring new employees is to define your core values and proactively hire people who fit those values. Everyone you hire will have an impact on the culture of your company in one way or another. Have you ever heard the saying, “One bad apple can spoil the bunch”? This is absolutely true when it comes to company culture. Keep your bunch healthy by making sure everyone you hire personally embodies your company’s core values.

Summit CPA’s Core Values:

- **Curiosity:** We are eager to understand the “why.”
- **Humor:** We like to laugh.
- **Collaboration:** We work together to develop our people and best serve our clients.
- **Adaptability:** We embrace and aggressively pursue change.
- **Empowerment:** We trust our people to do their jobs independently and constantly seek to improve.
- **Candor:** We speak the truth to make our team and clients better.

Screen for Emotional Intelligence

Emotional intelligence (EI) refers to a person's ability to recognize, understand and manage their emotions, as well as the ability to recognize, understand and influence the emotions of others. Someone with high EI is aware of how their emotions drive their own behaviors and impact others.

Emotional intelligence is proven to account for 50-60% of overall job success, demonstrating that it's an essential skill for your team members. People with higher levels of EI have the ability to be aware of and control their own emotions. They work better with others, manage clients more efficiently, and help foster a welcoming and accepting company culture.

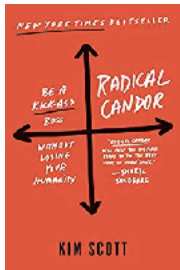
We believe that it is critical to screen for emotional intelligence during the interview process in order to build a team that is healthy and successful.



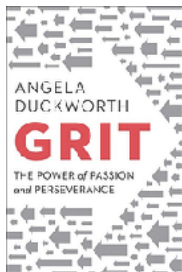
Look for True Potential

There are the standard interview questions that you have to cover and then there are questions that help you get to the core of the person you are interviewing. Your goal is to gain insight into who they are ultimately striving to be and if they have the where-with-all to get there.

Here are a couple of great books that we recommend for every leader and hiring manager:



Radical Candor by Kim Malone Scott — Kim describes “rock stars” and “superstars” that every team needs in order to be cohesive and grow. Avoid hiring “no stars” who don’t have the necessary skills, emotional intelligence or work ethic to do the job.



Grit by Angela Duckworth — Grit is about having a goal that you care about so deeply that it directs everything you do. You care about it so much that keep going even when you make a mistake or you fall down or there’s an obstacle in your path. Hiring people with grit is incredibly important because these are the people who will persevere toward long-term goals.



Consider Diversity

Diversity is important. Our society and our client base are not monolithic; neither should our staff be. When we think of diversity, we tend to think specifically about race or gender. While these are certainly important, diversity is even more broad.

Our initial feeling about a candidate can sometimes cloud our objective judgment. We tend to be drawn to personalities like our own which can result in hiring a lot of like-minded people which, over time, will result in a short-sighted team. Hiring for a diversity of backgrounds, skills, and perspectives, in addition to gender, age and nationalities, will make for a healthy, well-rounded team in the long run.

Hiring for diversity takes intentionality and an open-minded approach. We run a number of assessments during the hiring process to make sure we have a wide variety of depth and breadth to our team.

Interview Best Practices

1. The best predictor of future success is past success.
2. Interview questions should be behaviorally based.
3. Interview questions should ask for specific examples of behavior.
4. Ask open ended questions and then try to keep quiet!
5. Listen.



Sample Interview Questions: Behavioral Values

- **Flexibility:** If you had an altercation with your boss and were told that you were being “rigid and inflexible,” what would you do?
- **Humility:** What was the dumbest business decision you ever made?
- **Resilience:** Describe a work situation where you faced incredible odds, but prevailed.
- **Teachability:** Tell me about a situation that required you to learn something difficult.
- **Work Ethic/Drive:** What plans do you have for self-improvement and personal development?

Sample Interview Questions: Adaptability

- **Communication:** Have you ever had to "sell" an idea to your co-workers or group? How did you do it? Did they "buy" it?
- **Decision Making:** Give me an example of a time when you had to be quick in coming to a decision.
- **Interpersonal Skills:** Do you feel it is more important to be well liked by others or admired for being effective? Why?

Sample Interview Questions: Job Performance & Leadership

- **Leadership:** What is the toughest group that you have had to get cooperation from?
- **Motivation:** Describe a situation when you were able to have a positive influence on the action of others.
- **Team Player:** What do you see as the advantages and disadvantages of working as part of a team? Why?



Summary

Your people are the biggest asset in your company. Hiring the *right* people is essential for the success of your business. To do this, it's important to hire for your core values, screen for emotional intelligence, look for true potential and consider diversity. We believe that doing this has helped us develop the best team in the world!

[Meet Our Team](#)

NAVIGATE the JOURNEY

Special thanks to **Navigate the Journey**, and specifically Zach Montroy, for helping us navigate the hiring process. Zach serves as the People, Team and Organizational Strategist at Summit. Zach utilizes innovative and strategic solutions to help align mission, values, uniqueness and people competencies to ensure strategic plans are executed with excellence. He is a certified StratOp Facilitator, Leadership Coaching Specialist and a certified practitioner of the Leadership Practices Inventory (LPI), Fundamental Interpersonal Relations Orientation (FIRO-B), Thomas-Kilmann Conflict Mode Instrument (TKI), Emotional Intelligence (EQ-i 2.0 and EQ-i 360), MCore (Motivational Core), and Myers-Briggs Type Indicator (MBTI) DiSC and PeopleBest assessments. Zach is also an official member and contributor to the Forbes Human Resources Council.