



The Accounting White Board

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For any of you that have worked with me in the past 10 or so years have experienced a phenomenon called the white board. This wonderful erasable board has been known to bring both joy and sadness. The board also is responsible for a sense of pride and accomplishment once it is mastered.

The theory is simple. Put the responsibility and accountability of the job on the individual assigned to the job. If performance is at expected or beyond expected reward them. If it is not you need to go back and train them.

- This board is only for the accounting department.
- This board is only revised by the Office Manager.
- This board is guarded by the entire Accounting Department and weekly is the center of attention by all.

Here is the lay out, the legend shows the colors to be filed in on the date box.

Sch #	Sch Name	Person Responsible	6-4	6-11	6-18	6-25	7-2 End of Month	7-4	7-14
Sch 1	CIT	Amy							
Sch 2	New Inventory	John							
Sch 3	We Owe	Melissa							

BLUE	EXCELLENT
GREEN	ABOVE EXPECTATION
YELLOW	AT EXPECTATION
RED	BELOW EXPECTATION

This is a schedule review that happens every week. The first 6 week should be free. This is allowing you time to train each member of your team and go over the expectations. You must be precise as to what your performance categories represent and give the standards to your staff in writing upon initiating the program such as notes on control #'s, collection attempts, letters, Each 3rd red should become a write up. Each blue becomes a ticket

for a drawing held after eom, etc. Also advise your staff that at the end of your free period the board is erased and the real white board is implemented. Make this a mandatory program and be sure to invite the department managers to come in to see the unveiling each week (give your staff a few weeks to get to par). Also, be sure to put yourself on the white board. You will be surprised as how quickly your staff becomes excited over their work. The initial clean up period might exist for the schedules to get into the shape they need to be, however the week to week maintenance makes the end of the month just another day. 😊