

Your First 90 Days as a Client Service Manager

We are thrilled that you have chosen to share your time, skills, and unique gifts with us. As you embark on your journey, we recognize the significance of your first 90 days, which lay the groundwork for your long-term success as a valued team member.

During this crucial period, your learning and development will be a top priority. We believe that empowering you with knowledge and skills during these initial three months will enable you to serve our clients exceptionally and build meaningful relationships within the organization.

We have carefully mapped out your first 90 days. This plan encompasses clear priorities, goals, and milestones that will guide your progress.

You will receive valuable feedback from your Controller and CFO at three 30-day checkpoints. This feedback mechanism will help you gauge your growth, identify areas of excellence, and address any challenges proactively.

We are confident that you will make a positive impact on both our team and clients. Your dedication and commitment will undoubtedly lead to your thriving success in your role at DBA.

Month 1

Priorities

Build rapport with team

Understand services offered by DBA

Understand roles and responsibilities of each team member

Understand assigned clients' businesses

Attend all required trainings and meetings on time

Goals

Independently logs in and uses all DBA programs

Develops a weekly time-blocked schedule

Develops notes and has access to resources to initiate the following month responsibilities

Milestones

Completes bank feeds with few questions and little support

Completes payrolls with few questions and little support

Uses notes, video, and print resources to initiate and complete work

Month 2

Priorities

● Build rapport with clients

● Begin to complete work independently

● Track review comments and answered questions to prevent future errors

● Attend all required trainings and meetings on time

Goals

● Initiates weekly responsibilities independently

● Follows a weekly time-blocked schedule

● Refines notes and has access to resources to complete the following month responsibilities

● Completes some client close-outs independently with few errors

Milestones

● Completes bank feeds with few questions and little support

● Completes payrolls with few questions and little support

● Completes reconciliations and adjusting entries with little support

● Uses notes, video, and print resources to initiate and complete work

Month 3

Priorities

● Refine time-blocked schedule for new efficiencies

● Complete work independently, efficiently, with few or no errors

● Identify improvements for efficiency or client experience improvement

Goals

● Initiates weekly responsibilities independently

● Follows a weekly time-blocked schedule to complete work timely and efficiently

● Completes some client close-outs independently with no repeated errors

Milestones

● Completes bank feeds independently

● Completes payrolls independently

● Completes reconciliations and adjusting entries independently

● Uses notes, video, and print resources to complete work with no repeated errors