



# BALANCED BOOKS

## Bookkeeping & Consulting

### Job Description: Training & Development Supervisor

#### About Us

At Balanced Books, LLP, we are a fast-growing firm dedicated to providing exceptional bookkeeping services. Based in California's Central Valley, we support small and medium-sized businesses locally and nationwide with accurate, timely, and insightful financial services. We believe in creating a professional yet enjoyable work environment, where people are our greatest asset. We invest in your development through ongoing training, mentorship, and leadership opportunities, empowering you to grow and advance in your career. At Balanced Books, you're not just an employee; you're a valued part of our team. If you're ready to make an impact and grow with a thriving company, we'd love to meet you.

#### Summary

The Training & Development Supervisor reports to the HR Manager and plays a pivotal role in supporting new and existing team members through onboarding and continued growth. This position is responsible for ensuring all required training courses are completed for new recruits and that ongoing training is consistently delivered across the organization. The role focuses on coordinating, delivering, and tracking training programs that enhance employee performance, ensure consistency in processes, and align with the evolving needs of the organization. This position partners closely with Accounting Supervisors to support team-specific training needs and reinforce expectations within their teams, while ensuring alignment with company-wide standards. The role also maintains and manages all company Standard Operating Procedures (SOPs), ensuring they are accurate, up to date, and effectively supported through training across all teams. This role carries direct supervisory responsibility over newly onboarded employees throughout their 6–12-month training period. The Supervisor is accountable for the success of new recruits by managing structured 30–60–90 and 120-day training plan milestones, measuring performance and progress against defined benchmarks, and making ongoing assessments of employee fit, readiness, and likelihood of success in the role.

#### Key Responsibilities

- Training Program Development & Delivery:
  - Own and manage all company training programs, including onboarding and ongoing development.
  - Work cross-functionally with Accounting Supervisors and leadership to coordinate and deliver training aligned with team needs.
  - Create, maintain, and continuously improve training materials, including manuals, SOPs, videos, and e-learning resources.
  - Prepare and present training topics at team and company meetings using various media formats.
- New Recruit Supervision & Performance Management:
  - Serve as the direct supervisor for all newly onboarded employees throughout their 6–12-month training period.

- Hold new recruits accountable to structured 30, 60, 90, and 120-day training plan milestones; intervene with coaching or corrective action when progress falls short of expectations.
- Measure and evaluate new recruit performance and progress against defined role expectations and training benchmarks throughout the training period.
- Conduct ongoing assessments of employee fit and readiness and provide HR and leadership with documented recommendations regarding whether employees are on track to succeed in the role.
- Provide timely, documented feedback and coaching to new employees; escalate performance concerns to HR in accordance with company policy.
- SOP Management & Process Consistency
  - Maintain and manage all company Standard Operating Procedures (SOPs).
  - Partner with Accounting Supervisors to ensure SOPs reflect actual workflows and team expectations.
  - Conduct quarterly SOP reviews to ensure accuracy, relevance, and completeness.
  - Lead ongoing SOP cleanup, updates, and standardization across all departments.
  - Ensure SOP expectations are clearly communicated and consistently followed.
  - Identify gaps or inconsistencies in processes and implement improvements.
- Training Tracking & Accountability
  - Monitor organization-wide training completion and follow up with employees and Accounting Supervisors to ensure all required training stays on track.
  - Maintain organized training records and provide reporting to HR and leadership.
  - Identify organization-wide training gaps, recurring errors, and systemic performance trends across all teams; implement improvements in partnership with Accounting Supervisors.
  - Stay current with bookkeeping, compliance, and regulatory requirements that impact training and processes, and incorporate updates into training as needed.
- Confidentiality & Professionalism
  - Maintain confidentiality of all company, client, employee, and financial records.
  - Possess in-depth knowledge of firm products and services, including flat-rate billing.
  - Work independently, multi-task, and handle a variety of responsibilities efficiently.

## Minimum Qualifications

- Bachelor's degree in accounting, business, or related field preferred; equivalent work experience may be considered in lieu of degree.
- 3–5+ years of bookkeeping or accounting experience (QuickBooks preferred).
- Experience in training, onboarding, or employee development.
- Strong organizational and project management skills.
- Experience creating training materials, including written guides and video content.
- Strong communication and presentation skills.
- Proficiency in Microsoft Office and accounting software.
- Detail-oriented with a focus on consistency and follow-through.
- Ability to manage multiple priorities in a fast-paced environment.
- Strong interpersonal and collaboration skills.

## Preferred Qualifications

- Bachelor's degree in accounting, business, education, or a related field.
- Experience in training, learning & development, or onboarding-focused role.
- Experience working in a multi-client accounting or bookkeeping firm environment.
- Experience in creating structured training programs or curriculum.

- Familiarity with SOP development, documentation, or process standardization.
- Experience using learning management systems (LMS) or training tracking tools.
- Experience creating instructional videos or digital training content.
- Experience working with or supporting accounting teams in a supervisory or lead capacity.
- Certification in training or human resources (e.g., CPTD, SHRM-CP, PHR) is a plus but not required.

## **Physical Demands**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodation may be made to enable individuals with disabilities to perform the essential functions.

- While performing the duties of this job, the employee is frequently required to sit, talk or hear, as well as use hands and fingers to handle or feel.

## **Work Environment**

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodation may be made to enable individuals with disabilities to perform the essential functions.

- The noise level in the work environment is usually quiet.

## **Compensation**

Pay Scale: \$35.00- \$45.00 per hour

FLSA Classification: Non-Exempt

Work Location: In-office

## **Equal Employment Opportunity**

Balanced Books, LLP is an Equal Opportunity Employer. We are committed to providing an inclusive and welcoming environment for all employees and applicants. Employment decisions are made without regard to race, color, religion, sex, national origin, ancestry, age (40+), physical or mental disability, medical condition, genetic information, marital status, sexual orientation, gender identity or expression, military or veteran status, or any other characteristic protected under applicable federal, state, or local law, including the California Fair Employment and Housing Act (FEHA). We also prohibit harassment and retaliation based on any of these protected characteristics. Applicants who require reasonable accommodation to participate in the hiring process are encouraged to contact HR.

## **Benefits**

- Subsidized Medical/Dental/Vision
- Paid Time Off and Sick Time Available
- Eight paid holidays
- 401(k) savings plan with employer match
- Flexible work schedules that promote work/life balance