

10 Steps to Achieving

RECONCILIATION ZEN



Survey the Land

Assign a risk rating to every account on the balance sheet.



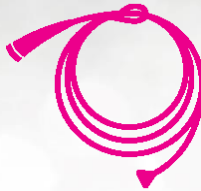
Keep it Real

Be realistic about the number of accounts the team can reasonably get to each month.



School Your Peeps

Update policies and procedures and provide access to training.



Crack the Whip

Set monthly deadlines for reconciliations and communicate them often.



Prefab is Fab

Use standard forms for all reconciliations for speed and consistency.



Don't Settle

Set quality standards so that the work is being done right, not just fast.



Talk is Cheap

Provide written feedback. Document evidence of review.



Grow a Set (of Eagle Eyes)

Anticipate bottlenecks early. Catch exceptions and deal with them swiftly.



Know Your Stats

Gain key insight into the balance sheet health at the macro level.



Make it Rain

Be it a glowing performance review or a pizza party, reward the team for a job well done.

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