📅 End-Sync 30-Day Training Plan for New Accountants

Objective:

This plan helps new accountants onboard effectively, gradually building their confidence and competence across month-end close, reconciliations, reporting, and internal processes.

Week 1: Orientation & Systems Access

Day	Task	Owner	Notes/Sign-off
1	Welcome & Introduction to Team	Manager	
1	Set up system access (ERP, close software, shared drives)	IT/Manager	
2	Review company accounting policies & procedures	Manager	
2	Overview of internal controls & compliance requirements	Controller	
3	Introduction to Month-End Close Process & role responsibilities	Manager	
4	Shadow month-end task preparation (checklists, reconciliations)	Team Lead	
5	Review Accounting Standards Quick Reference (GAAP/IFRS)	Self-Study	
5	Complete initial self-assessment of onboarding progress	Employee	

Week 2: Hands-On Training with Supervised Tasks

Day	Task	Owner	Notes/Sign-off
6	Walkthrough of Reconciliation Process (bank, AP, AR)	Manager	
7	Practice preparing sample reconciliations using End-Sync templates	Employee	
8	Review Journal Entry Process – formatting, documentation, approvals	Manager	
9	Introduction to variance analysis – what to review, how to document explanations	Team Lead	
10	Start preparing live reconciliations under supervision	Employee	
10	Review Cross-Department Communication Checklist	Employee	

Week 3: Assisted Participation in Month-End Close

Day	Task	Owner	Notes/Sign-off
11	Participate in Month-End Close Kickoff Meeting	Employee	
14	Assist with data collection for reconciliations (bank statements, invoices, accruals)	Employee	
15	Draft reconciliations (with manager review)	Employee	
16	Prepare and propose journal entries (review with manager)	Employee	
17	Participate in variance analysis review meeting	Employee	
18	Complete close checklist for assigned tasks	Employee	
19	Review documentation standards & save work to shared folder	Employee	

Week 4: Independent Execution & Final Evaluation

Day	Task	Owner	Notes/Sign-off
20	Perform assigned reconciliations independently	Employee	
21	Prepare journal entries with minimal supervision	Employee	
22	Draft variance explanations and present to manager	Employee	
23	Finalize checklists for all assigned tasks & cross-check documentation	Employee	
24	Participate in month-end debrief – lessons learned & process improvement suggestions	Employee & Manager	
25	Complete final Self-Assessment	Employee	
25	Manager completes final Evaluation & Feedback	Manager	
26-30	Additional training on automation tools, AI efficiencies, and best practices for future improvements	Employee	

Key Milestones

Milestone	Expected Completion	Notes
Systems Access Completed	Day 2	
Policy & Process Orientation Completed	Day 5	

First Reconciliation Completed	Day 10	
First Journal Entry Drafted	Day 16	
Full Month-End Cycle Completed (with support)	Day 19	
Independent Reconciliation & JE Completed	Day 23	
Final Evaluation Completed	Day 25	
Full Onboarding Complete	Day 30	

Training Topics Covered

✅ Month-End Close Process Overview
✅ Core Accounting SOPs (Reconciliations, Variance Analysis, Journal Entries)
✅ Internal Controls & Documentation Standards
✅ Accounting Systems & Technology
✅ Cross-Department Collaboration
✅ Accounting Standards (GAAP/IFRS Overview)
✅ Process Improvement & Automation

End-of-Onboarding Review Process

- **Self-Assessment:** Employee reflects on confidence level across key areas.
- **Manager Review:** Manager evaluates technical performance, process understanding, and soft skills (collaboration, communication).
- **Action Plan:** If gaps exist, a personalized development plan is created for ongoing training.

How to Use This Plan

- Save this as part of your onboarding folder.
- Assign clear owners for each task (Manager, Employee, Team Lead, etc.).
- Use the Notes/Sign-off column to capture feedback, additional training needs, and completion dates.
- Review progress weekly to ensure your new hire stays on track.

Customizing the End-Sync 30-Day Training Plan to Fit Your Company's Needs

The End-Sync 30-Day Training Plan for New Accountants provides a structured framework designed to help new hires transition smoothly into their roles. However, every company has unique processes, systems, and priorities, which means this plan should be modified to align with your organization's specific accounting procedures, reporting structure, and technology stack.

Why Customization is Necessary:

✅ **Different ERP & Financial Systems** – Training should include company-specific software and tools.
✅ **Industry-Specific Requirements** – Accounting processes differ for retail, manufacturing, SaaS, etc.
✅ **Internal Policies & Controls** – Adjustments may be needed for company-specific compliance and approval workflows.
✅ **Reporting & Close Timelines** – Some companies have a 3-day close, while others have a 10-day process.

Steps to Modify the Training Plan for Your Organization

1. **Review Your Company's Month-End Close Timeline**

- Identify which days are critical for close activities and align the training accordingly.
- If your company has an accelerated close (3-5 days), front-load key reconciliation training earlier in the plan.

2. **Map Training to Your Accounting Software & Tools**

- Add sessions covering your ERP system, reconciliation software, automation tools, and reporting dashboards.
- Include hands-on system walkthroughs specific to your company's workflow.

3. **Incorporate Company-Specific Policies & Compliance**

- Insert training on internal controls, approval workflows, and financial policies that are unique to your company.
- If your company follows SOX compliance, add a section focused on documentation requirements.

4. **Adjust Task Assignments Based on Role & Team Structure**

- Some companies centralize reconciliations, while others assign them per department.

- Modify the plan so the new hire is learning from the right team members.

5. **Include Key Contacts & Mentorship Opportunities**

- Add an internal list of key contacts for each process (e.g., who approves journal entries, who handles variance analysis).
- Assign a mentor or buddy for questions and training reinforcement.

6. **Modify Based on Business Cycles & Financial Calendar**

- If your company has quarter-end and year-end close, adjust the training schedule to account for heavier workloads.
- Introduce forecasting & budgeting training if applicable.

7. **Gather Feedback & Continuously Improve**

- After each new hire completes the plan, collect feedback on what worked well and what could be improved.
- Update the training guide annually to reflect process improvements and new system implementations.

Final Note

The End-Sync 30-Day Training Plan serves as a starting point to streamline onboarding, but it should be adapted to reflect the real-world workflows of your company. Taking the time to customize this plan ensures that new accountants are equipped with the right knowledge, tools, and confidence to contribute effectively from day one.

🚀 **Recommendation:** Designate a team lead or training coordinator to oversee modifications and ensure consistency in onboarding across your finance team.