

The Art of Troubleshooting

by Sara Kirk, CPA, CFE, Consulting Partner

Posted on March 2, 2023



I am frequently asked what I do as a financial consultant, and I often answer that I am basically a professional question answerer and problem solver. I spend hours each day providing responses to inquiries from clients and business contacts as well as from individuals within the firm. Additionally, I work with others to identify issues and propose solutions to solve problems they are facing.

Do I know the answer to every question or have the solution to every problem? I wish! But for information that I cannot access off the top of my head, I draw upon a wealth of resources I have compiled over my years in governmental finance and accounting and upon the ability to research and troubleshoot. These skills have served me well in my career, and as a result, I encourage the development of these skills in those I work with. I recommend that every leader or mentor encourage their team members to develop and utilize these skills in the execution of their day-to-day job responsibilities. These critical skills can also be applied in one's personal life as well.

How can you develop those around you into expert troubleshooters and problem solvers? Here are some tips:

- Question your team members on the research done prior to asking a question. This will help to transition your team to become strong troubleshooters!
- If the search results came up empty, walk through together where the answer can be located so that they will know where to look for similar information next time. Provide email responses with links to where the information can be sourced. Encourage team members to create URL bookmarks for easy retrieval.
- Create handbooks and other documents and files containing key information to assist employees in performing their assigned job duties. This will help your employees to build

confidence in their abilities! This applies to employees at all levels, departments, and divisions.

- Organize resource files consistently by source or topic. For example, you may have source file containing GASB resources, statutory guidance, auditor general guidance, or *Uniform Guidance*. Your organization may also have topical files on areas such as payroll and employee benefits, accounts payable, travel guidelines, or single audit compliance.
- Create a frequently asked questions (FAQ) document for use in operations, particularly for areas that provide customer service or have a large number of site level employees to oversee. Task one individual within each department or division to collect and continue to update the FAQ document as needed. Update handbooks or manuals to include clarifications or to incorporate new or changing requirements. Ensure all updates are reviewed by a knowledgeable supervisor prior to being published for use.
- Invest in the professional development of staff. Rotate personnel to provide opportunities for all staff to attend trainings and conferences. This demonstrates the entity is invested in the professional growth of each employee. Task each employee to share the information obtained at the training with the team upon their return to the organization.
- Develop a network of subject matter experts to reach out to when existing internal resources come up short.

“If you give a man a fish, you feed him for a day. If you teach a man to fish, you feed him for a lifetime”. Chinese proverb

The content of this article is for general information purposes only and does not constitute advice. Heinfeld, Meech & Co., P.C. tries to provide content that is true and accurate as of the date of writing; however, we give no assurance or warranty regarding the accuracy, timeliness, or applicability of any of the contents.