Welcome to Gentle Frog

We're happy to have you in the Frog family!

www.gentlefrog.com

Now that you're family...

To help ensure the best possible working relationship, we've outlined some expectations and processes here. You can always reach us at rachel@gentlefrog.com or bookkeeping@gentlefrog.com if you have any questions.

Some basics...

Rachel Barnett

Meghan Weeks

Introduction to Gentle Frog

At Gentle Frog, we specialize in simplifying your financial journey. Whether you need help learning to use QuickBooks, with periodic bookkeeping or ongoing bookkeeping, we're here to support you every step of the way. Relax, knowing that we've got your books covered, so you can focus on what matters most to you.

Introduction to the team

Our dedicated team comprises two QuickBooks Online Advanced Certified ProAdvisors: Rachel Barnett and Meghan Weeks.

For clients seeking training, Rachel will be your primary point of contact. She brings extensive expertise and experience to ensure your training needs are met efficiently.

Bookkeeping clients will typically work closely with Meghan, who serves as their primary point of contact. However, please note that we are a deliberately small firm by design. We believe in the value of personalized service and getting to know our clients well. While Meghan will be your primary contact, both Rachel and Meghan will be involved in your bookkeeping journey to provide you with the best possible support.

We want to emphasize that we do not outsource your work offshore. In situations where we require additional assistance, we have a select group of US-based bookkeepers we may temporarily engage. Furthermore, when we reach capacity and cannot accept new clients, we refer our overflow leads to these trusted bookkeepers. Our goal is to maintain a workload that ensures the highest quality of service. As a two-person team, along with our exceptional admin support, we believe we are right-sized to provide you with the utmost attention and care.

Hours of operation

Our business hours run from 9 AM to 5 PM Eastern Time. We recognize both US and Canadian public holidays.

Communication and 1099s...

Communication methods and response times

At Gentle Frog, we primarily communicate through email as it allows us to manage our time effectively. Our goal is to respond to your emails within two business days, though you will often hear from us much sooner.

For matters that require a more in-depth discussion, we offer up to 30 minutes of Zoom conferencing each month. You can find the link for scheduling these sessions in your welcome email.

For our ongoing bookkeeping clients, we periodically send check-in emails through our secure portal, which may include questions or updates related to your financial needs.

How we communicate client questions

If we ever have questions about certain transactions, we'll use Google Sheets to list our questions. We'll include details like the account, date, and the transaction amounts. You'll have access to this sheet and we'll send the link as needed.

1099 Processing

In our standard packages, 1099 form processing is not included. However, for those who let us know by December 1st, we can offer this service at an additional cost. There is a $99 setup fee and then a $20 charge for each 1099-NEC or 1099-MISC form that we generate. If this service is something you would like, please don't hesitate to let us know.

If you decide to handle your 1099s independently, you might find our blogs on the subject quite helpful. You can access them here: https://www.gentlefrog.com/blog/?_sft_post_tag=1099&_sf_s=1099. Some tax professionals also offer 1099 generation as part of their services, so it might be worth reaching out to them directly.

Deadlines and client responsibilities...

Internal deadlines

To ensure your bookkeeping is caught up with plenty of time for your tax preparer, we request clients to submit their records by January 31 of the tax year. Our goal is to avoid last-minute pressures and reduce stress.

Client responsibilities

For our bookkeeping clients, we require that all necessary documents be provided within one month of our initial request. Typically, this will be documents that clients have easy access to such as bank statements or point of sale records.

If any changes occur such as adding a bank account, changing payment processors or similar, please ensure that we receive the updated information and any related documents or online access within one month from these changes. We don’t want to scramble to catch up on your record keeping.

Sending and receiving documents

Whenever possible we ask clients to grant us accountant access to any online systems they utilize, provided that these systems allow for accountant access. For those who may not wish to or are unable to do so, we offer the option of using our secure portal for document uploads. This method ensures heightened security and sends Gentle Frog real-time notifications when new documents are added.

Additionally, for clients seeking a receipt management solution, we recommend considering Hubdoc.com.

In the event that we need to send you documents, we will use our portal for efficient document delivery and retrieval.

Apps we use

Throughout our work on your account, we may utilize several apps to enhance efficiency. Occasionally, you might receive notifications from Intuit informing you that we've integrated a new app. If you ever find the need to streamline specific tasks within your own work, you can explore a directory of apps available at apps.com

Our workflow and change in scope...

Our typical workflow

Many of our clients opt for what we refer to as 'after-the-fact' QuickBooks management. In this scenario, clients typically handle tasks like creating invoices and paying bills on their own. Our role is to ensure the business maintains accurate financial records for both income and expenses. We also work closely with your tax preparer to facilitate a seamless tax filing process.

The frequency of our work within your QuickBooks depends on the package you've chosen; the most popular choice among clients is the twice-monthly package.

QuickBooks provides a range of reports that can be configured to be automatically emailed to you on a scheduled basis. If you require a specific report that you don't see readily available, please don't hesitate to let us know. We'd be happy to see if we can create it within QuickBooks for you or work with you to find an external solution.

Change in scope

As your business continues to evolve, growth and change are natural occurrences. Should your business undergo changes that result in different bookkeeping requirements or needs, we'll be more than happy to chat with you about updating the engagement letter and fees to align with your revised needs.

Appointment process and call workflow

1. Clients can book a specific date and time for their appointment.
2. At the start of the call, we'll collaboratively determine the agenda for our discussion.
3. We will work through the established agenda during the call. Rachel will take notes throughout the conversation and identify homework for the client as well as topics for future discussions.
4. After the call concludes, Rachel will send you a video recording of the session along with the notes taken during our discussion.

Now to the bookkeeping...

Ad-Hoc bookkeeping / Single bookkeeping project

1. We will provide a checklist of the required documents to get started, access to your document portal and our contact information.
2. We require that the initial set of documents be sent within one month from the date the agreement is signed.
3. Once we receive your documents, we'll begin working on your QuickBooks file. Please note that it may take 1-2 weeks before we start asking questions. We strive to streamline our process to maximize efficiency for both you and us during the question phase.
4. Most one-time projects can typically be completed within a few weeks. However, please be aware that any delays in responding to our requests may affect the project's completion timeline.
5. Upon project completion, we will collaborate with you to ensure a seamless transition. Our client base includes a diverse range of individuals, from fellow bookkeepers with limited time to small business owners who will take over their bookkeeping once everything is organized.

Ongoing bookkeeping

1. We will provide a checklist of the required documents to get started, access to your document portal and our contact information.
2. We require that the initial set of documents be sent within one month from the date the agreement is signed and continue to be sent monthly. Failure to send us documents so that we can manage your bookkeeping in a timely manner will result in us discontinuing services and a new agreement (at the current rates) for the catch up work when documents become available.
3. We will immediately begin working on your QuickBooks file. Please note that it may take 1-2 weeks before we start asking questions. We strive to streamline our process to maximize efficiency for both you and us during the onboarding phase.
4. We'll be in touch regularly with questions, when there are no questions, you can expect to hear from us about once a month.

Help a frog out...

Helping the bookkeeping team

We love and appreciate our clients, but it's easier and better for everyone if our clients do not help us with the bookkeeping. If you see things you would like done differently, please reach out to the bookkeeper you typically work with (either Meghan or Rachel) and let her know.

Rates

We'll modify the bookkeeping fee to align with any changes in the scope of work. In addition, we may make annual rate adjustments to account for the increased expenses that affect all small businesses, including our own.