



Accounting & Operations Manager – Candidate Questionnaire

Please complete the following questionnaire. This should take approximately 10–15 minutes. Your responses will help us better understand your experience and fit for this role.

Section 1: Basic Information

1. Full Name:
 2. Email Address:
 3. Phone Number:
 4. Are you currently employed? (Yes/No)
 5. When would you be available to start?
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Section 2: Accounting Experience

6. Have you been fully responsible for managing a company's books (AP, AR, payroll, reconciliations, financials)? If yes, briefly describe your responsibilities:
7. Describe your monthly close process. What steps do you take and how long does it typically take you?
8. What accounting software have you used extensively and which are you most comfortable with? (Sage, QuickBooks, etc)
9. How do you ensure accuracy in financial statements?

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Section 3: Construction & Job Costing (Key Section)

10. Do you have experience with job costing? If yes, briefly describe your process:

 11. Briefly explain WIP accounting and how you have applied it (if applicable):

 12. How would you handle a situation where a job is going over budget?
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Section 4: Problem Solving & Real-World Scenarios

13. A bank account does not reconcile. Name a few steps you would take to identify and fix the issue:

 14. A subcontractor submits an invoice, but their insurance certificate is expired. What do you do?

 15. You have payroll, vendor payments, and financial reporting all due at the same time. How do you prioritize?
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Section 5: Payroll, Compliance & Organization

16. Describe your experience with payroll processing and payroll tax payments:

17. Have you worked with (check all that apply):
 - 1099 subcontractors
 - Workers' compensation reporting/audits
 - Payroll tax filings"

18. How do you stay organized when managing multiple responsibilities and deadlines?

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Section 6: Small Business Fit

19. Have you worked in a small business environment (under ~20 employees)? If yes, what did you like or dislike about it?

 20. This role includes both accounting and administrative/operational tasks. Are you comfortable handling a wide variety of responsibilities? Please explain:
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Section 7: Communication & Ownership

21. Describe a role where you operated with little supervision. How did you ensure everything stayed on track?

 22. How do you communicate financial information to a business owner who may not have an accounting background?
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Section 8: Final Questions

23. What interests you about this position specifically?

24. What would make you a strong fit for this role?

25. What are your compensation expectations?

26. Is there anything else you would like us to know?

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