

The August 2005 Certified Bookkeeper (CB) Survey

- What is a Certified Bookkeeper (CB)?

In 1998, the American Institute of Professional Bookkeepers (AIPB), the bookkeeping profession's association, established the Certified Bookkeeper program. Certification demonstrates the ability to handle all the books for a firm of up to 100 employees. To become certified, a bookkeeper must have 2 years' experience working as a bookkeeper, sign a Code of Ethics and pass a national examination.

The national certification exam, given at Prometric Test Centers, covers: (1) adjusting entries, (2) error correction (including the bank reconciliation), (3) payroll, (4) depreciation (book and tax), (5) recording and costing out merchandise inventory, and (6) internal controls and fraud prevention.

- What Did the Survey Measure?

In August 2005, a survey of CBs was conducted by Lewis & Clark Research, Raleigh, NC, to measure the impact of certification on their careers. The questionnaires (see end of report) was sent to 700 CBs, and 309 were completed and returned.

- Highlights of the Survey

Employed CBs

- 58% of employed CBs got a raise in their present jobs, of whom one-half (56%) say that certification had a direct impact on their salary increase.
- 41% of employed CBs say that they have been promoted and/or received a new job as a result of becoming certified.

Freelance CBs

- 70% of freelance responders have used their certification in their marketing and advertising.
- 56% of freelance responders say that their certification has helped them gain new clients.
- 33% of freelancers have raised rates for existing clients by an average 14% since becoming certified.
- 37% of freelancers have raised rates for new clients by an average 15% since becoming certified.

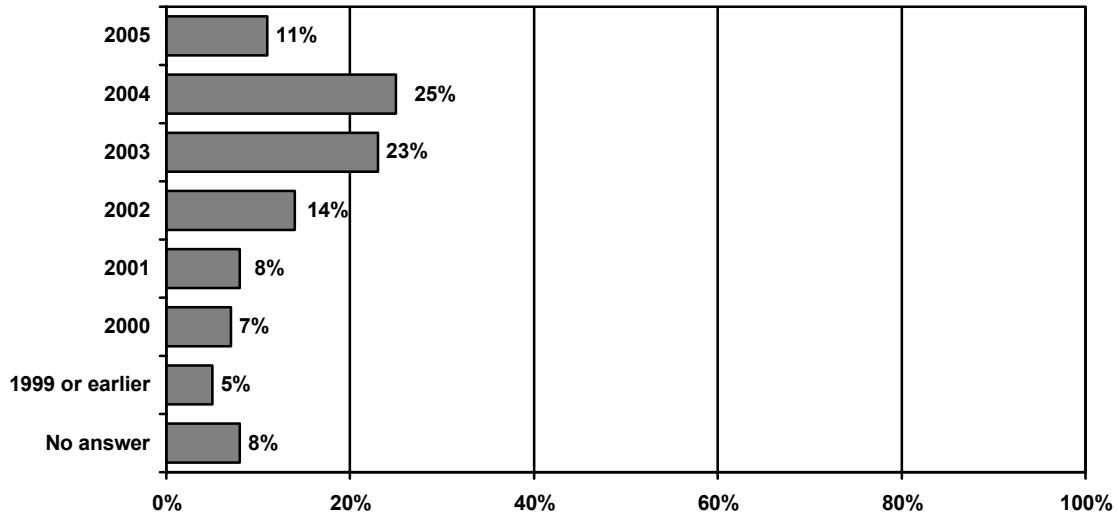
All CBs (employed and freelance)

- Respondents report that gains achieved from certification closely matched expectations—gaining new knowledge (68%), professional pride (58%), and enhancing self-image (49%).
- 27% of CBs report that they were given higher-level responsibilities as a result of becoming certified. Added responsibilities included supervisory and managerial roles, along with specific accounting and payroll responsibilities.
- 97% of CBs would recommend certification to other bookkeepers.

Details of the results follow.

- **Date of Certification**

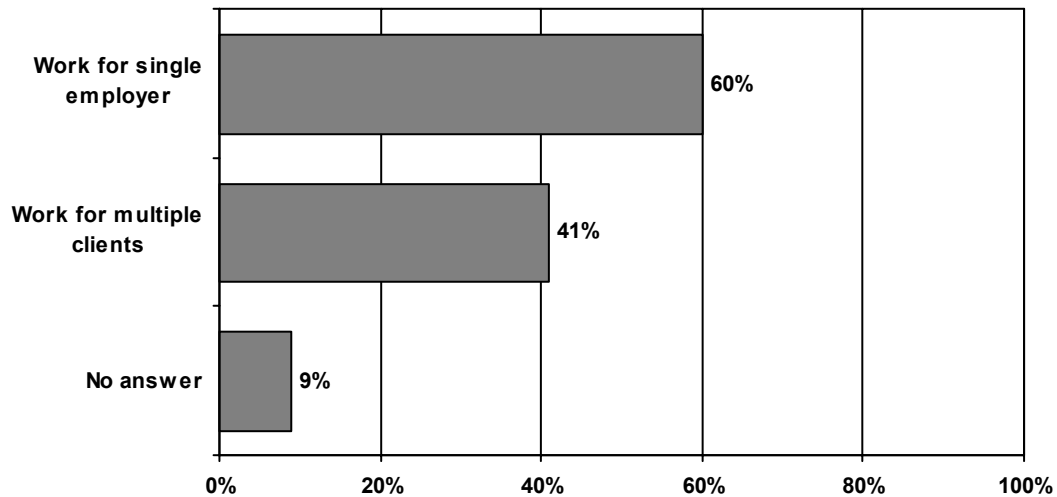
More than one-third of respondents (36%) became certified within the past two years. On average, respondents have been certified for 2.3 years.



1. When did you become certified?						
	All Respondents		Employed Bookkeepers		Freelance Bookkeepers	
BASE	#	%	#	%	#	%
1998	1	0%	1	1%	0	0%
1999	12	4%	4	2%	9	7%
2000	20	7%	15	8%	6	5%
2001	26	8%	14	8%	12	10%
2002	42	14%	26	14%	21	17%
2003	72	23%	36	20%	31	25%
2004	76	25%	44	24%	30	24%
2005	34	11%	26	14%	8	6%
No answer	25	8%	18	10%	9	7%
Average # of years ago		2.3		2.1		2.5

- Employed v. Freelance Certified Bookkeepers

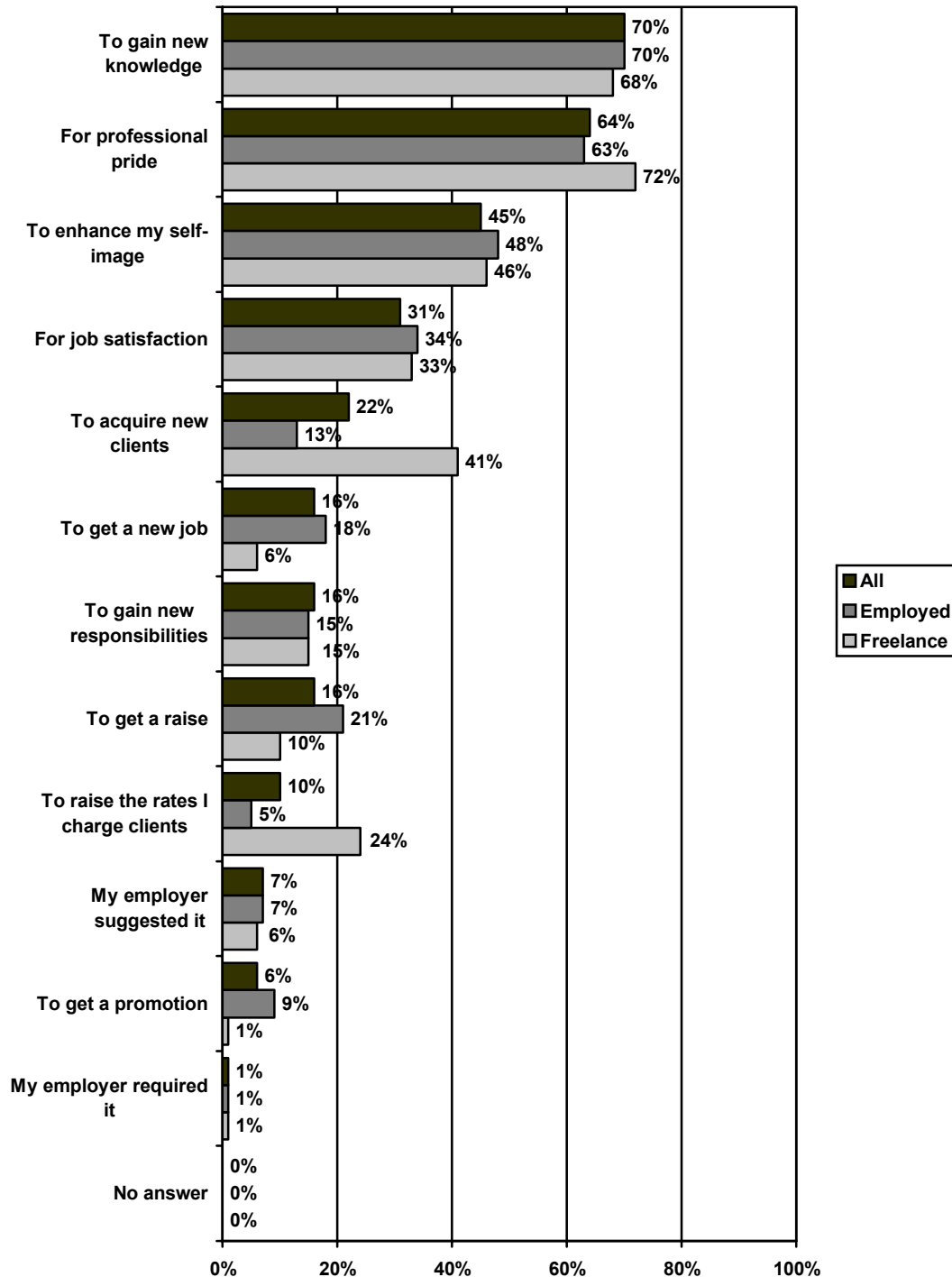
Three-fifths of respondents (60%) work as a bookkeeper for a single employer, while two-fifths (41%) work for multiple clients, i.e., as a freelancer. There is some overlap between these groups because some employed bookkeepers freelance during off hours.



2. Are you . . .	All Respondents		Employed Bookkeepers		Freelance Bookkeepers	
	#	%	#	%	#	%
BASE	309		184		126	
A full-time or part-time bookkeeper for a single employer	184	60%	184	100%	29	23%
A freelance or self-employed bookkeeper for multiple clients	86	28%	27	15%	86	68%
An owner or employee of a bookkeeping company with multiple clients	50	16%	6	3%	50	40%
No answer	28	9%	0	0%	0	0%

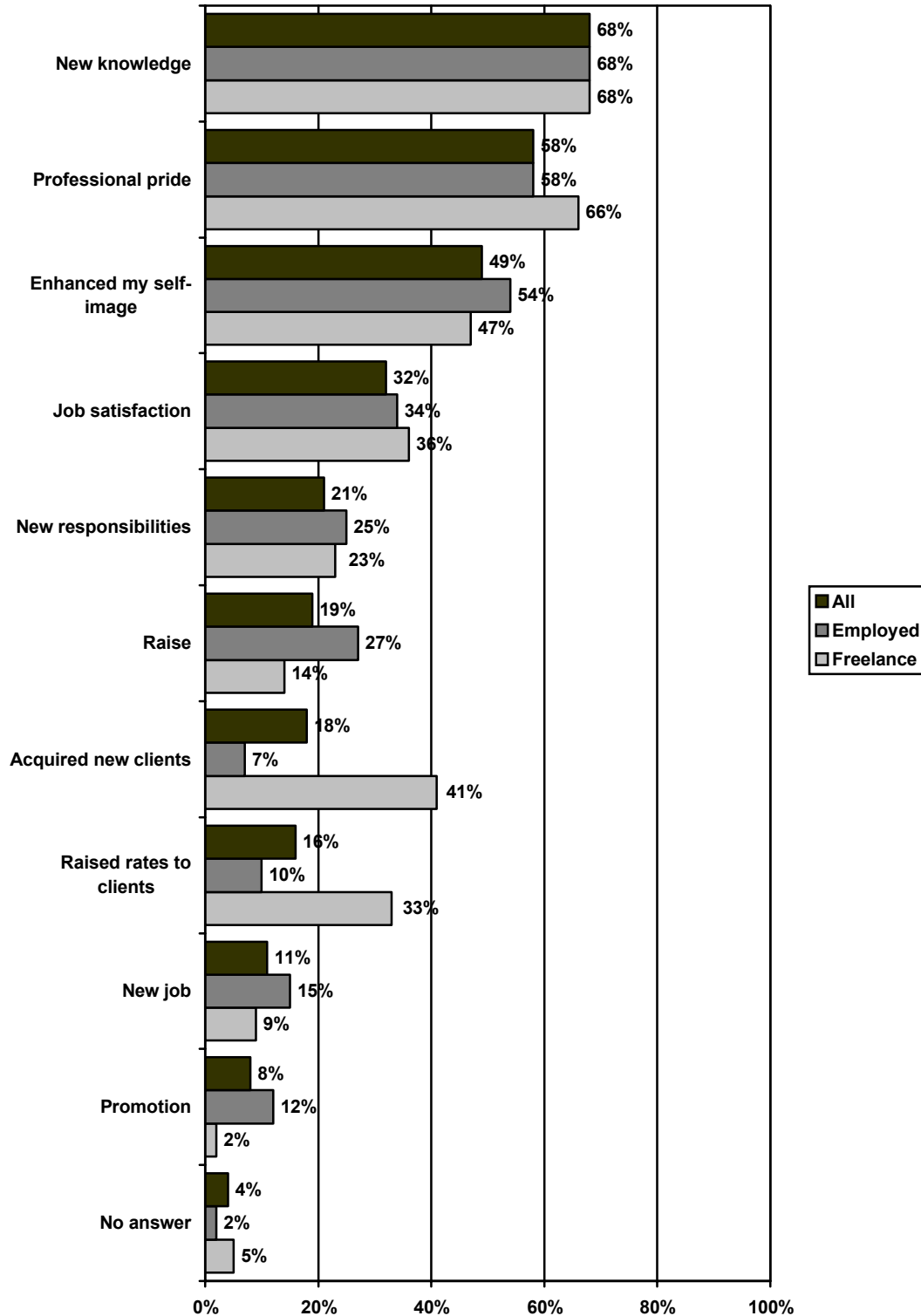
- Reasons for Becoming Certified, and Rewards of Doing So

Respondents indicate strong personal reasons for seeking certification. Gaining new knowledge (70%) and professional pride (64%) are cited as reasons by approximately two-thirds each of respondents, and enhancing self-image (45%) is cited by close to one-half. A significant minority of freelance bookkeepers say that they became certified to help acquire new clients (41%), while smaller percentages of employed bookkeepers expected a raise (21%), new job (18%), or promotion (9%).



- Reasons for Becoming Certified, and Rewards of Doing So (continued)

Respondents report gains achieved as a result of certification closely matched their expectations—gaining new knowledge (68%), professional pride (58%), and enhancing self-image (49%).



- Reasons for Becoming Certified, and Rewards of Doing So (continued)

3a. Why did you decide to become certified?						
	All Respondents		Employed Bookkeepers		Freelance Bookkeepers	
BASE	#	%	#	%	#	%
To get a new job	49	16%	33	18%	7	6%
To get a raise	48	16%	38	21%	13	10%
To get a promotion	18	6%	16	9%	1	1%
My employer suggested it	22	7%	13	7%	7	6%
My employer required it	3	1%	2	1%	1	1%
For professional pride	198	64%	116	63%	91	72%
To gain new responsibilities	48	16%	27	15%	19	15%
To raise the rates I charge clients	32	10%	9	5%	30	24%
To acquire new clients	68	22%	23	13%	52	41%
For job satisfaction	96	31%	63	34%	41	33%
To enhance my self-image	139	45%	88	48%	58	46%
To gain new knowledge	215	70%	128	70%	86	68%
No answer	1	0%	0	0%	0	0%

3b. What have you gained as a result of becoming certified?						
	All Respondents		Employed Bookkeepers		Freelance Bookkeepers	
BASE	#	%	#	%	#	%
New job	35	11%	28	15%	11	9%
Raise	58	19%	49	27%	18	14%
Promotion	24	8%	22	12%	3	2%
Professional pride	178	58%	106	58%	83	66%
New responsibilities	66	21%	45	25%	29	23%
Raised rates to clients	49	16%	18	10%	42	33%
Acquired new clients	56	18%	12	7%	52	41%
Job satisfaction	98	32%	62	34%	45	36%
Enhanced my self-image	152	49%	99	54%	59	47%
New knowledge	211	68%	125	68%	85	68%
No answer	13	4%	4	2%	6	5%

• Higher-Level Responsibilities Gained as a Result of Becoming Certified

Approximately one-quarter of respondents (27%) report that they were given higher-level responsibilities as a result of becoming certified, including 33% of employed bookkeepers and 24% of freelance bookkeepers.

4a. Have you been given higher-level responsibilities in your job as a result of becoming certified?							
BASE	All Respondents		Employed Bookkeepers		Freelance Bookkeepers		
	#	%	#	%	#	%	
Yes	84	27%	61	33%	30	24%	
No	200	65%	119	65%	77	61%	
No answer	25	8%	4	2%	19	15%	

Added responsibilities included supervisory and managerial roles, along with specific accounting and payroll responsibilities.

Higher-Level Responsibilities Bookkeepers Gained as a Result of Becoming Certified —Comments from Returned Surveys

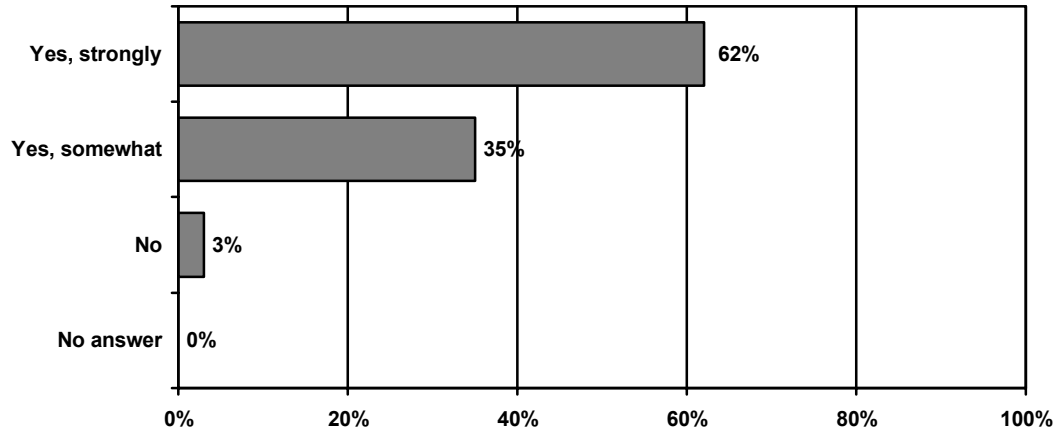
- Accepted position as staff accountant for a CPA firm that specialized in small gov't. audits.
- Accountant functions
- Accounting Manager
- Analyzing monthly financials and cash flow to present to CEO and President. Preparing quarterly financials and forecasts for company CPA.
- Assisting with audit work paper preparation
- Budget preparation
- Cash flow control, controller responsibilities, financial analysis, business “management,” taking the financial pressure off of the owner
- Clients with more complicated bookkeeping
- Complete responsibility for the accounts of my employer (part-time)
- Controller of a much larger corporation
- Full payroll, able to better review and adjust financial statements and review and adjust inventory
- General ledger acct. reconciliations, human resource—payroll and benefits mgmt.
- General ledger reporting for all aspects of payroll, bank reconciliation, paying of all payroll taxes, W-2s, etc.
- Grant management; more accounting responsibility
- Handling clients’ work completely on my own
- I am Finance Director at my company. I have had a similar title previous to being certified, but I think it helps to have it listed on my credentials
- I am in charge of payroll. I handle some of the more complicated accounts payable, including all royalty payments. I handle many GL and journal entries. I complete and file sales tax returns. I reconcile several bank accounts. I am being trained to do monthly, quarterly and yearly closes. I have a high security clearance and enjoy the trust of my employers. I am the senior accounting clerk for a company that publishes and sells audio books worldwide through their catalog.
- I am required to handle IRS inquiries, payroll issues and make more decisions on my own.
- I do everything but yearend income taxes.
- I do more balancing of accounts than before.
- I do payroll processing; make journal entries at month end.

• Higher-Level Responsibilities Bookkeepers Gained as a Result of Becoming Certified
—Comments from Returned Surveys (continued)

- I have been asked to assist CPAs in depreciation and inventory schedules. I have been asked by clients to train staff bookkeeper on double-entry bookkeeping.
- I have more authority working with our clients and more decision-making responsibilities.
- I have taken more responsibility in the financial management of our agency. My certification has validated many decisions I have insisted on.
- I know what I'm doing (thoroughly); I therefore am able to accept full responsibility for our accounting function.
- I now handle all bookkeeping, payroll and reporting for multiple clients.
- I now have an accounting assistant under me and make more financial decisions.
- I teach bookkeeping and preparation for the CB exam. I gained knowledge and can perform certified, full charge, bookkeeping services.
- I was preparing recurring financials, but I now have the responsibility of completing the first financial for a large base of clients. I also have the responsibility of helping with other employees' training.
- I'm in charge of payroll.
- In charge of client billing department, overseeing 151 clients
- Making year-end adjustments
- Manage a small company that is one of our clients by myself
- Manager
- Many new clients with many added responsibilities
- Month-end JEs and closing; financial responsibilities
- More client contact (previously handled by engagement partner only), train clients, set up client books at client sites
- More consulting-related work on bookkeeping procedures; teaching clients
- Owner of bookkeeping business
- Payroll
- Payroll administration, 401(k) preparation, assist in human resources
- Payroll and tax returns
- Preparation of payroll tax returns
- Prepare financial statement
- Promoted to manager. Oversee all accounting functions.
- Review of other's work
- Run the entire company financial operation.
- Self-employed instead of an employee office clerk. Able to offer clients more services.
- Senior Acct. Assoc.
- CPA's asking me to prepare depreciation schedules
- Solely responsible for bookkeeping. Accountant checks books occasionally.
- Supervise bookkeeping dept.
- Supervising employees and ensuring that all functions of a/p, a/r and payroll are carried out in a timely and adequate fashion
- Supervision of other employees, training responsibilities, high-level client contact
- Supervisory role
- Supervisory positions
- The accountant only comes in twice each year instead of quarterly to audit my work. I can make many more decisions on my own without needing approval.
- To prepare all JE of balance sheet at month end
- To supervise and teach other bookkeepers
- Took over payroll and billing
- Year-end audits
- Year-end closings with some corporation tax returns

- **Would Certified Bookkeepers Recommend Certification to Other Bookkeepers?**

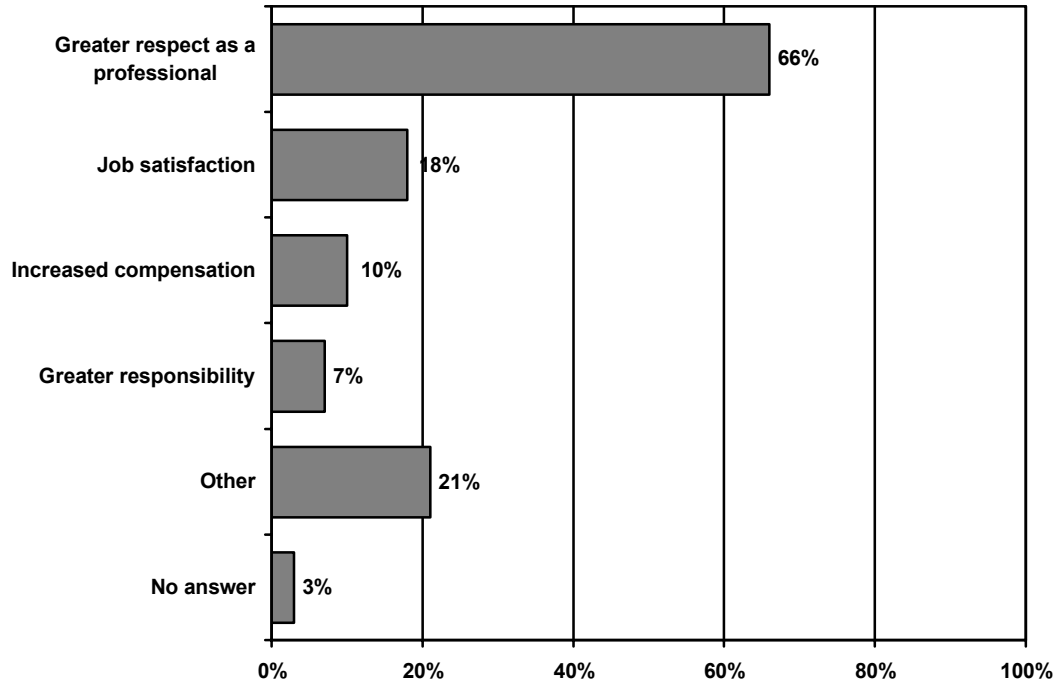
Respondents overwhelmingly say that they would recommend certification to other bookkeepers —approximately two-thirds (62%) “strongly” and one-third (35%) “somewhat.”



5a. Would you recommend certification to other bookkeepers?							
	All Respondents		Employed Bookkeepers		Freelance Bookkeepers		
	#	%	#	%	#	%	
BASE	309		184		126		
Yes, strongly	192	62%	114	62%	88	70%	
Yes, somewhat	107	35%	66	36%	36	29%	
No	10	3%	4	2%	2	2%	
No answer	0	0%	0	0%	0	0%	

- **Recommending Certification** (continued)

Two-thirds of respondents (66%) cite “greater respect as a professional” as the most important reason they would recommend certification.



5b. IF YES, what do you think is the most important reason to become certified?						
	All Respondents		Employed Bookkeepers		Freelance Bookkeepers	
	#	%	#	%	#	%
BASE	299		180		124	
Increased compensation	30	10%	19	11%	9	7%
Greater responsibility	22	7%	17	9%	6	5%
Greater respect as a professional	198	66%	117	65%	93	75%
Job satisfaction	54	18%	35	19%	20	16%
Other	62	21%	38	21%	24	19%
No answer	8	3%	3	2%	3	2%

Specific responses are shown on the following page.

- Specific Reasons Respondents Would Recommend Certification to Other Bookkeepers
—Comments from Returned Surveys

Other important reasons

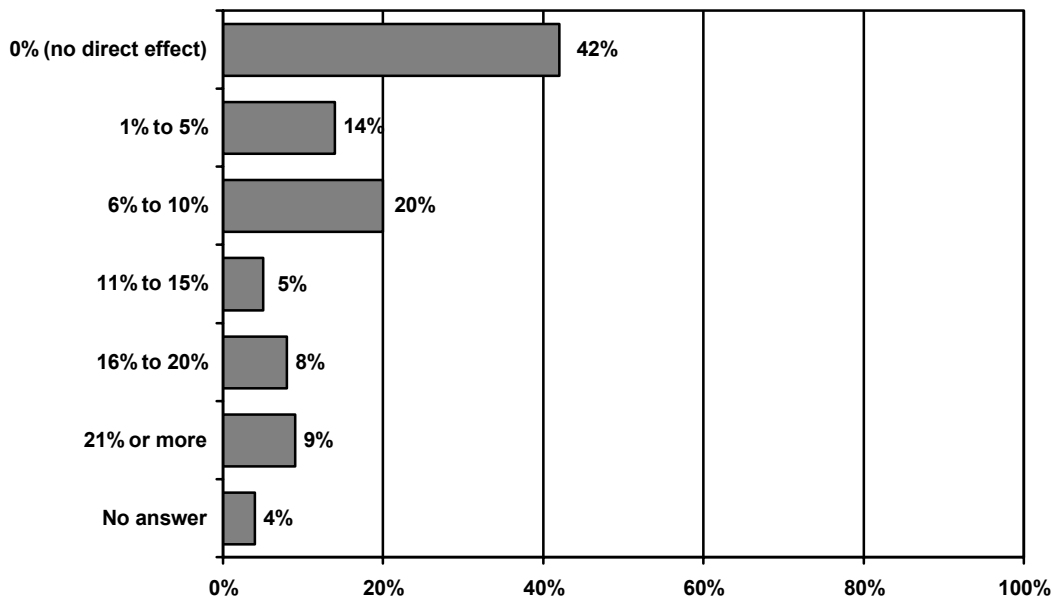
Accomplishment
 Appear professional
 Better able to do job for client
 Better understanding, current knowledge of responsibilities
 Certification as a professional
 Code of ethics
 Continued knowledge through Continuing Professional Education
 Demonstrate range of skills and knowledge
 Education
 Education required
 Enjoy getting newsletters, CB quizzes based on the newsletters to earn my CPECs, etc.
 Establish professional standards for bookkeepers
 Gain important knowledge
 Gain knowledge
 Gain knowledge of all aspects of accounting
 Gaining experience in areas that are crucial to the biz
 Good review
 Greater knowledge (2 mentions)
 Greater knowledge for possible promotion
 Greater skills
 Helps acquire new clients when self-employed
 Increased knowledge
 Increased knowledge for profession
 Keep one's education-knowledge levels high
 Keeping updated on laws as part of my CPE as a CB
 Knowledge (7 mentions)
 Knowledge and reference
 Knowledge, access to changing information
 Learn correct methods and principles
 Learning something new
 Looks good on resume
 Marketing tool for new clients
 Measurable way to show you have knowledge necessary
 More knowledge
 New knowledge (2 mentions)
 Not really sure
 Obtain fundamentals of bookkeeping, updated
 Personal gain
 Proof of competency
 Proof that certain level of competency has been met
 Proven knowledge
 Self-satisfaction
 Self-validation
 Self-confidence
 Source of continuing knowledge upgrade
 Supplemental income during retirement as freelance bookkeeper
 Ties together all loose ends usually learned on job
 To gauge knowledge level
 Understanding of range of duties bookkeeper may have
 Up-to-date knowledge
 Validity—employers need to know you can do job
 Your knowledge increases

- **Impact of Certification on Salary (Employed Bookkeepers)**

More than half of respondents (58%) say that their salary has increased since they became certified.

7a. Has your salary changed since becoming certified?		
BASE	184	
	<u>#</u>	<u>%</u>
Yes	107	58%
No	76	41%
No answer	1	1%

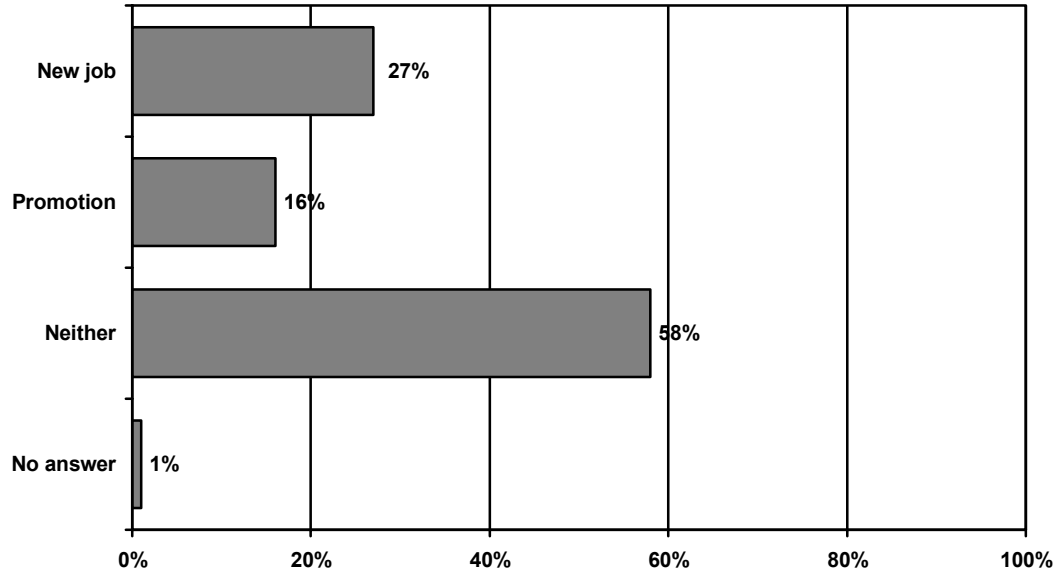
Among the 58% of respondents whose salary has changed since becoming certified, one-half (56%) say that certification had a direct impact on their salary increase.



7b. IF YES, approximately what % do you believe your salary changed as a direct result of your certification?		
BASE	107	
	<u>#</u>	<u>%</u>
0% (no direct effect)	45	42%
1% to 5%	15	14%
6% to 10%	21	20%
11% to 15%	5	5%
16% to 20%	8	8%
21% to 25%	2	2%
26% to 30%	1	1%
31% to 40%	1	1%
41% to 50%	3	3%
51% or more	2	2%
No answer	4	4%
Average %		8.7

- **New Jobs/Promotions (Employed Bookkeepers)**

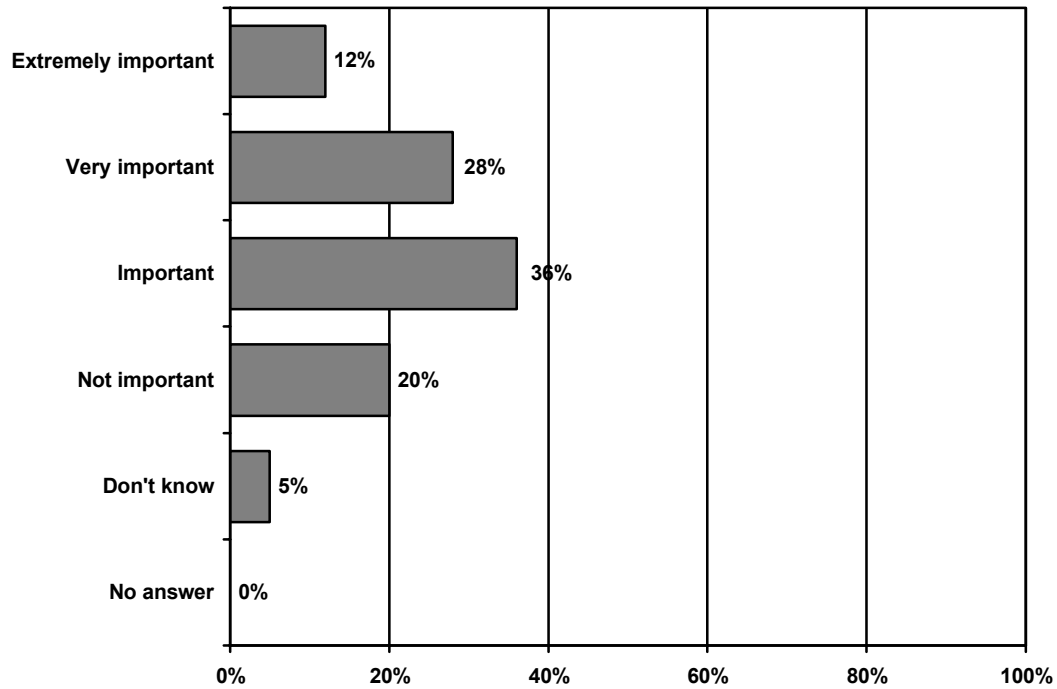
Approximately two-fifths of respondents (41%) say that they have been promoted and or received a new job as a result of becoming certified.



8a. Have you been promoted or gotten a new job since becoming certified?		
BASE	184	
	<u>#</u>	<u>%</u>
Yes—a promotion	29	16%
Yes—a new job	49	27%
No	106	58%
No answer	2	1%

- **New Jobs/Promotions (Employed Bookkeepers)**

Three-quarters of those respondents (76%) who have been promoted or received a new job since becoming certified felt that the certification was important, very important, or extremely important in that process.



8b. IF YES, what impact do you think your certification had?		
BASE	76	
	#	%
Extremely important	9	12%
Very important	21	28%
Important	27	36%
Not important	15	20%
Don't know	4	5%
No answer	0	0%

- **Impact of Certification on Marketing (Freelance Bookkeepers)**

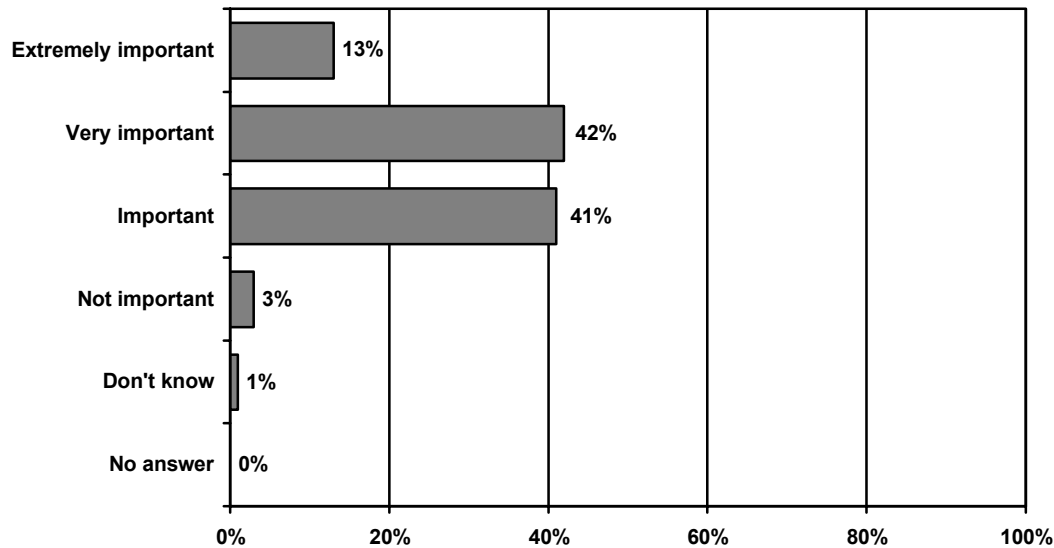
Over two-thirds of freelancers (70%) have used their certification in their marketing and advertising.

9. Have you used your certification in your marketing and advertising?		
BASE	126	
	<u>#</u>	<u>%</u>
Yes	88	70%
No	28	22%
No answer	10	8%

Over -half of freelancers (56%) say that their certification has helped them gain new clients.

10a. Has your certification helped you gain new clients?		
BASE	126	
	<u>#</u>	<u>%</u>
Yes	71	56%
No	41	33%
No answer	14	11%

Of the freelancers who have gained new clients as a result of becoming certified, almost all (96%) felt that their new status was either important, very important, or extremely important.



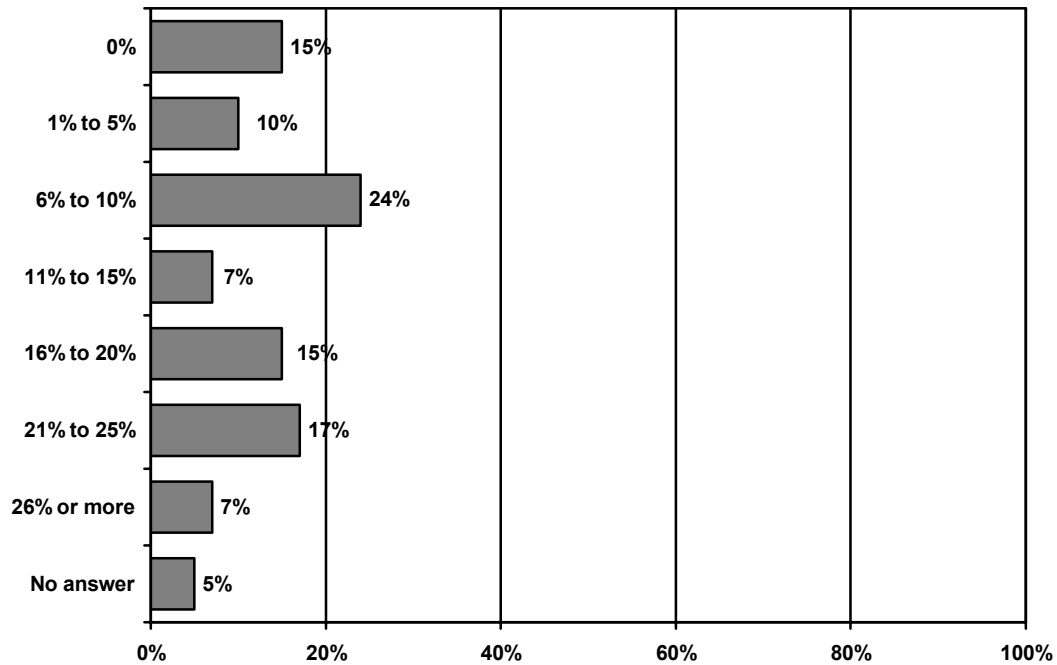
10b. IF YES, what impact do you think your certification had?		
BASE	71	
	<u>#</u>	<u>%</u>
Extremely important	9	13%
Very important	30	42%
Important	29	41%
Not important	2	3%
Don't know	1	1%
No answer	0	0%

- Impact of Certification on Existing Client Rates (Freelance Bookkeepers)

One-third of freelancers (33%) have raised rates for existing clients since becoming certified.

11a. Since becoming certified, have you raised your rates for EXISTING CLIENTS		
BASE	126	
	#	%
Yes	41	33%
No	63	50%
No answer	22	18%

The average increase reported for existing clients was 14%.



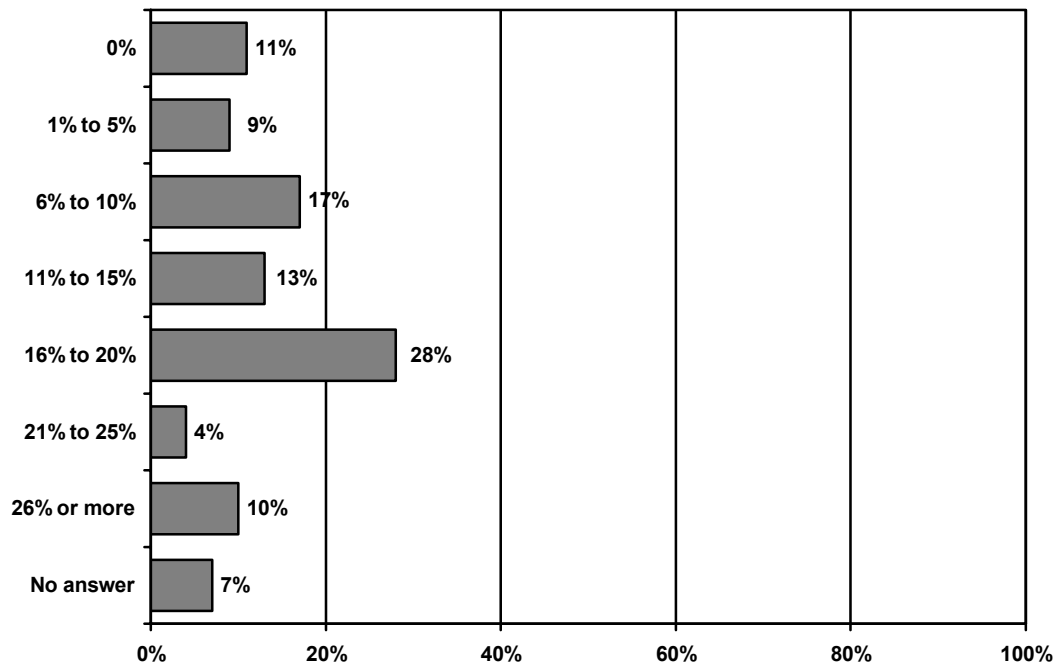
11a. IF YES, by . . .		
BASE	41	
	#	%
0%	6	15%
1% to 5%	4	10%
6% to 10%	10	24%
11% to 15%	3	7%
16% to 20%	6	15%
21% to 25%	7	17%
26% or more	2	7%
No answer	2	5%
Average %		14.1

- Impact of Certification On New Client Rates (Freelance Bookkeepers)

More than one-third of freelancers (37%) have raised rates for new clients since becoming certified.

11b. Since becoming certified, have you raised your rates for NEW CLIENTS?		
BASE	126	
	<u>#</u>	<u>%</u>
Yes	46	37%
No	51	41%
No answer	29	23%

The average increase reported for new clients was 15%.



11b. IF YES, by . . .		
BASE	46	
	<u>#</u>	<u>%</u>
0%	5	11%
1% to 5%	4	9%
6% to 10%	8	17%
11% to 15%	6	13%
16% to 20%	13	28%
21% to 25%	2	4%
26% to 30%	2	10%
No answer	3	7%
Average %		15.4

“Is there anything you would like to add?”—Comments from Returned Surveys

- A great program!
- A wonderful program. Helped me especially with payroll taxes, bank reconciliations, adjusting entries, accruals and correcting errors.
- AIPB has been an educational tool for me, with certification as proof that a certain level of competency had been met and is ongoing. *The General Ledger* [AIPB’S monthly member newsletter] is very informative and helpful.
- Although the increased compensation is nice, the added respect from the CPAs, accountants and business owners I have had contact with is the best!
- As a prior business owner of a tax and acct. office, I found the info relevant and primarily beneficial to me in being able to offer more services. I gained a better sense of what was required to run a business and to provide quality services to my clients. The books are good resources.
- Became certified because I market to CPAs for referrals and having worked in public accounting, I know how bad many people who call themselves bookkeepers really are!
- Becoming certified led me to continue my education in university.
- Being a “Certified Bookkeeper” and an “Enrolled Agent” shows and recognizes my knowledge of accounting and tax.
- CB’s program was very intense and I am glad I took it. If a position opens up in bookkeeping, I would feel confident in pursuing it.
- Certification assures my employer and my clients that my knowledge has been tested. Membership in and certification by AIPB helps assure my employer and clients that I am bound by a code of ethics and that I am continuing my professional education on a consistent basis.
- Certification gave me confidence in handling basic bookkeeping functions of my job.
- Certification helps sort out those persons calling themselves bookkeepers from the “real deal.” I hope to see an annual meeting or gathering by the AIPB for CBs.
- Certification plus QuickBooks or Sleeter Group certification adds to your status especially on the QuickBooks Website. Certified Bookkeepers, I’ve found, have better skills than most uncertified bookkeepers who work for CPAs.
- Certification process gave me in-depth understanding of many things I had been doing for years as a bookkeeper. An accountant asked me for recommendations on some setup issues!
- Even if someone did not get certified, the information and testing (self) is very beneficial in enhancing knowledge of the different aspects of bookkeeping as well as being able to talk intelligently with CPAs.
- AIPB is an excellent organization. *General Ledger* newsletters contain a wealth of knowledge and provide current information on a multitude of topics.
- For me, the main benefit of certification is keeping abreast of all the changes that happen within the profession and access to all of this knowledge base.
- Grant accounting
- Great program—thank you to the founders!
- Have passed on information to a few people. Would like to see more national publicity.
- I am basically doing the same functions now as I was before becoming certified; however, I’ve found that a lot of clients are impressed by initials after a person’s name, so the “CB” designation after my name makes them think I do so much more and know more than before.
- I am currently not working by choice. I intend to keep my certification current because I think it puts me a big step above those that are “uncertified” bookkeepers.
- I am full time payroll and accounts receivable clerk for my employer. They have acknowledged my certification and CPE as important. I have 12 freelance accounts and have had most for several years, since this is part time, not a lot of growth but it has had impact on 2 new clients I picked up last year.
- I am pleased to see efforts to raise public awareness of this distinction, so they will look for “CB” for bookkeepers just as they do “CPA” for accountants and accept nothing less.
- I have become more confident in the way I handle my job.
- I like the experience. Becoming a CB gave me an opportunity to get my feet wet in accounting and allowed me to realize my dream of becoming a CPA.
- I started a new position prior to becoming certified, but was already in the process. I think this assisted me in getting the job as well as a better salary.
- “I think it is a great idea to get certified—there need to be some standards for bookkeepers and, with a certified bookkeeper, an employer knows what to expect. I’ve had nightmares hiring bookkeepers. They might know QuickBooks or Peachtree but don’t know the accounting principles, and I’ve encountered some real messes when I used to work with clients. Thank you!

- “Is there anything you would like to add?”—Comments from Returned Surveys (continued)

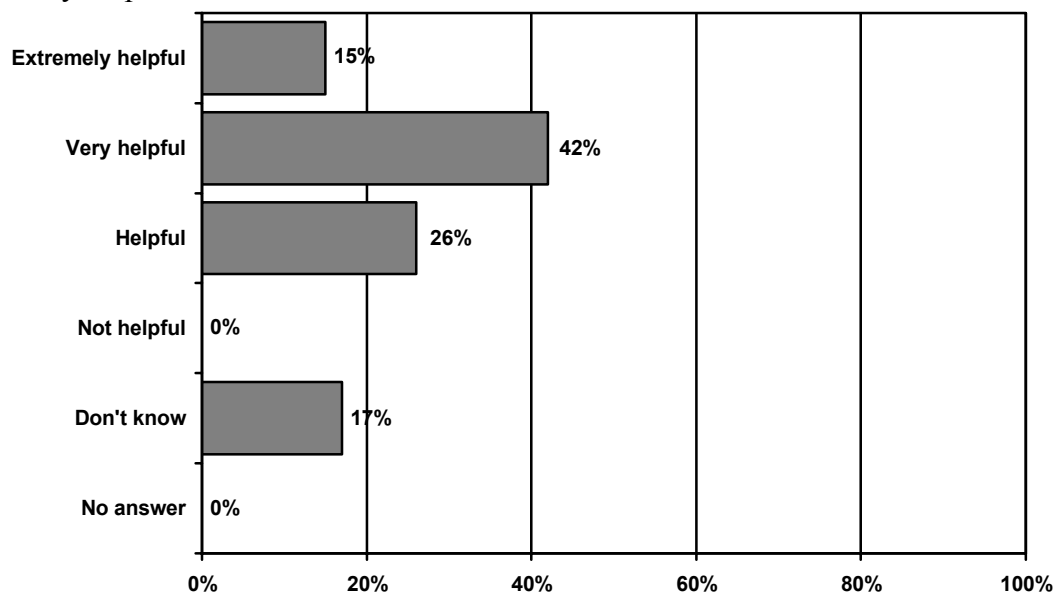
- I think it is a great program and accounting students should take it.
- I took this course because I have been with one employer 17 years and out of school for 20 years. I thought I was going to move and would need to seek new employment. Certification would give me a broad-based knowledge covering things I haven't used for years—like inventory since I work for a law firm.
- I value my certification more than my college education. It is an excellent choice for a bookkeeper.
- I was promoted to an assistant manager position soon after certification. Part of my promotion was due to how well I train other staff members. I use the CB materials.
- I work for an accounting firm and their #1 complaint is people who claim to be bookkeepers and are no more than data- entry people. It causes more work and higher fees to the client. The CB designation signifies understanding.
- I would recommend the certification to all bookkeepers to gain knowledge and prestige, to gain more clients.
- I'm looking for a full-time job as a bookkeeper, and it's very important for me to be certified.
- When I took the prep course, I met some wonderful bookkeepers and have developed a network of new friends.
- It convinced me to take further courses to become a CPA and to change my career from community journalism to bookkeeping and/or accounting.
- It is great to have AIPB for a resource if any questions arise regarding bookkeeping. One phone call and I have an answer.
- It is nice to be able to assure clients that my skills are above average and my knowledge is very reliable.
- Being certified mostly gives me confidence in my knowledge base.
- My clients use me because of my QB knowledge. The additional knowledge I gained in CB courses allows me to provide better service.
- Please note that I work for a school district and therefore I am not in the typical bookkeeping world. Nonetheless, I believe that becoming certified helped me in a recent promotion to Accounting Supervisor—as I do not have a college degree.
- Primarily, I took the certification just to prove I could. It certainly has been helpful in maintaining my credibility in the accounting firm that has employed me for the last 8 years.
- Public education re certified bookkeepers will increase the respect for and credibility of certified bookkeepers.
- The class I took to become certified helped with understanding accounting, therefore to pass exam and, as a result, a better understanding of my job responsibilities.
- The professional designation seems to have an impact when trying to increase your client base. I'm so glad I chose to become a CB!
- The study books and tests were extremely helpful in that it helped me to gain more bookkeeping knowledge and more confidence.
- This course has given me knowledge and my supervisors have been surprised and greatly impressed with the information I retained from the course.
- When taking the certification course, I observed that while a number of the students (myself included) had been practicing in the field for a number of years, we all had various gaps in our knowledge and overall understanding of the practice. I felt that the course succeeded in filling those gaps and that what I learned has functioned as a stepping stone to an ever greater understanding of the profession.
- Would recommend to any bookkeeping or accounting professional who wants to be acknowledged in the profession.

- Using the AIPB Certification Flyer

AIPB created a flyer that spells out what a Certified Bookkeeper can do for a company or client. One-third of respondents (35%) have given the AIBP flyer on certification to someone. This percentage is fairly similar for both employed bookkeepers (33%) and freelance bookkeepers (40%).

6a. Have you given the new AIPB flyer on certification to anyone?							
	All Respondents		Employed Bookkeepers		Freelance Bookkeepers		
	#	%	#	%	#	%	
BASE	309		184		126		
Yes	106	34%	60	33%	50	40%	
No	203	66%	124	67%	76	60%	
No answer	0	0%	0	0%	0	0%	

Most respondents (83%) who have used the AIPB flyer felt that it was either helpful, very helpful, or extremely helpful.



6b. IF YES, how helpful do you think it was in explaining certification to them?							
	All Respondents		Employed Bookkeepers		Freelance Bookkeepers		
	#	%	#	%	#	%	
BASE	106		60		50		
Extremely helpful	16	15%	11	18%	9	18%	
Very helpful	44	42%	23	38%	22	44%	
Helpful	28	26%	16	27%	13	26%	
Not helpful	0	0%	0	0%	0	0%	
Don't know	18	17%	10	17%	6	12%	
No answer	0	0%	0	0%	0	0%	

A Confidential Survey of Certified Bookkeepers

FOR ALL RESPONDENTS

1. When did you become certified? Month _____ Year _____

2. Are you . . . (Please ✓ all that apply.)
- A full-time or part-time bookkeeper for a single employer
 - A freelance or self-employed bookkeeper for multiple clients
 - An owner or employee of a bookkeeping company with multiple clients

- 3a. Why did you decide to become certified? (Please ✓ all that apply.)
- | | |
|---|--|
| <input type="checkbox"/> To get a new job | <input type="checkbox"/> To gain new responsibilities |
| <input type="checkbox"/> To get a raise | <input type="checkbox"/> To raise the rates I charge clients |
| <input type="checkbox"/> To get a promotion | <input type="checkbox"/> To acquire new clients |
| <input type="checkbox"/> My employer suggested it | <input type="checkbox"/> For job satisfaction |
| <input type="checkbox"/> My employer required it | <input type="checkbox"/> To enhance my self-image |
| <input type="checkbox"/> For professional pride | <input type="checkbox"/> To gain new knowledge |

- b. What have you gained as a result of becoming certified? (Please ✓ all that apply.)
- | | |
|---|--|
| <input type="checkbox"/> New job | <input type="checkbox"/> Raised rates to clients |
| <input type="checkbox"/> Raise | <input type="checkbox"/> Acquired new clients |
| <input type="checkbox"/> Promotion | <input type="checkbox"/> Job satisfaction |
| <input type="checkbox"/> Professional pride | <input type="checkbox"/> Enhanced my self-image |
| <input type="checkbox"/> New responsibilities | <input type="checkbox"/> New knowledge |

4a. Have you been given higher-level responsibilities in your job as a result of becoming certified?

Yes No

b. IF YES, what higher-level responsibilities do you now have?

5a. Would you recommend certification to other bookkeepers?

Yes, strongly Yes, somewhat No

- b. IF YES, what do you think is the most important reason to become certified? (Please ✓ one only.)
- Increased compensation
 - Greater responsibility
 - Greater respect as a professional
 - Job satisfaction
 - Other (please specify): _____

(continued on other side)

☑ FOR EMPLOYED BOOKKEEPERS

6a. Has your salary changed since becoming certified?

- Yes No

b. *IF YES*, approximately what % do you believe your salary changed as a direct result of your certification?

- _____ % No direct effect

7a. Have you been promoted or gotten a new job since becoming certified?

- Yes – a promotion Yes – a new job No

b. *IF YES*, what impact do you think your certification had? (Please ✓ one only.)

- Extremely important Important Don't know
 Very important Not important

☑ FOR BOOKKEEPERS WITH MULTIPLE CLIENTS (CERTIFIED BOOKKEEPERS)

8. Have you used your certification in your marketing and advertising?

- Yes No

9a. Has your certification helped you gain new clients?

- Yes No

b. *IF YES*, what impact do you think your certification had? (Please ✓ one only.)

- Extremely important Important Don't know
 Very important Not important

10. Since becoming certified, have you raised your rates for . . .

a. Existing clients

- Yes, by _____ %
 No

b. New clients

- Yes, by _____ %
 No

☑ FOR ALL RESPONDENTS

11. Is there anything else you would like to add?

12a. May we call you for additional comments?

- Yes No

b. *IF YES*, please provide name and phone number below.

13a. Have you given the new AIPB flyer on certification to anyone?

- Yes No

b. *IF YES*, how helpful do you think it was in explaining certification to them? (Please ✓ one only.)

- Extremely helpful Helpful Don't know
 Very helpful Not helpful

THANK YOU FOR YOUR HELP!

Please return in the enclosed postage paid envelope to: Lewis & Clark Research, P.O. Box 31027, Raleigh, NC 27622