

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

maintain work quality, and drive productivity across your team? If you struggle in these areas, It could be due to a lack of standardization of your accounting workflows ...

Shahram Zarshenas • Mar. 30, 2022



As your accounting firm grows, do you find yourself struggling to delegate work, maintain work quality, and drive productivity across your team? If you struggle in these areas, It could be due to a lack of standardization of your accounting workflows and processes.

In this article, we cover 8 accounting workflow checklists that you can use to streamline your accounting workflows and scale your firm. You can read through the whole article or click on any topic on the table of contents that you'd like to jump to. Let's get started!

You may be wondering, “How can accounting workflow checklists help my firm?”

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

and wastes time.

When your time is wasted, your entire business suffers. If you're not completing your tasks properly and on time, your clients will be understandably upset and may take their business elsewhere.

After all, you are handling their money!

An [accounting workflow checklist](#) alleviates this problem by giving your staff a step-by-step process and all the information needed to complete the client's work quickly. They will literally have a straightforward guide to follow every time, which will prevent them from leaving things out or having to ask you questions. You'll be able to focus on your own projects, knowing your employees are completing their projects with little to no input from you.

Benefit 2 – They result in consistent client deliverables

As your firm grows, it is vital that you can guarantee all your clients consistent deliverables every time. If you can't, it will cause rework and clients will get upset and potentially take their business elsewhere.

Unfortunately, as your firm grows and you hire more employees, it becomes harder to ensure consistent work quality for all clients since you're no longer doing everything yourself. You have to delegate client work to your new staff members if you want to take on more clients and continue to grow your firm. However, new staff members typically make mistakes due to a lack of experience.

Thankfully, accounting workflow checklists can solve this problem!

By implementing accounting workflow checklists, you can provide your staff with a step-by-step process to follow and all the information they need to ensure the work

gets done correctly every single time. Just as if you were doing it yourself! This results

Hello. It looks like you're using an ad blocker that may prevent our website from working properly. To receive the best experience possible, please make sure any blockers are switched off and refresh the page.

If you have any questions or need help you can email us

CPA Practice Advisor is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors.

© 2024 Firmworks, LLC. All rights reserved