

IS YOUR FIRM FUTURE-READY?

A 2-MINUTE CHECKLIST FOR ACCOUNTING PRACTICE OWNERS



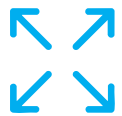
How prepared is your firm to thrive in the next 12 months?

Use this quick checklist to assess if you're ready—or if you're leaving opportunity (and time) on the table.



CAPACITY & WORKLOAD

- ☐ We have the in-house bandwidth to take on new clients without overloading the team
- ☐ Our team isn't overwhelmed during tax season or audit cycles
- ☐ We consistently meet deadlines without last-minute rushes



STAFFING & RETENTION

- ☐ We're not affected by high staff turnover or recruitment delays
- ☐ We're confident in our ability to hire skilled staff quickly when needed
- ☐ We have access to qualified resources for niche or seasonal work



GROWTH PLANNING

- ☐ We have a clear strategy to scale without burning out our core team
- ☐ We're turning down work due to resource limitations (this is a red flag!)
- ☐ We're exploring support options like outsourcing or automation to enable growth



TECHNOLOGY & PROCESSES

- ☐ Our team is using up-to-date tools and processes
- ☐ Manual tasks are being automated wherever possible
- ☐ We regularly review and refine our internal workflows



RISK & COMPLIANCE

- ☐ We're confident about meeting all compliance and deadline obligations
- ☐ We've got backups or contingency plans for sudden staff absence or turnover
- ☐ We've assessed the data security and resilience of all our service providers



YOUR SCORECARD:

Count your ticks.

- ▶ **13–15:** You're ahead of the curve. Keep it up!
- ▶ **9–12:** There's room to optimise—especially for growth or resilience.
- ▶ **Below 9:** Now might be the right time to revisit your operational strategy.

WANT TO TALK THROUGH YOUR RESULTS?

We're happy to walk you through it—no hard sell, just a practical conversation.

[\[Book a quick chat with our expert\]](#)