



8-point checklist for choosing an accounting outsourcing partner



This checklist will help you gather complete information about the outsourcing partner in question so that you can take a call quickly.

Pro tip: let a representative from QXAS Inc take the checklist test. If we pass, join the outsourcing bandwagon and work with us. Simple!

1 Background check

Retrieve basic info on the outsourcing partner such as the number of years they have been in the business, services they provide, geographies they cover and more. If you can, visit their office and meet the people who may be handling your account.

2 Data security standards

Accounting data is sensitive and should be dealt with utmost care. Therefore, find out what security they have in offices, where the information is stored, whether or not the data goes out of the country.

3 Accounting software used

You need to ensure your outsourcing partner works on the same software as you do. If they don't, they should be capable of working on your software through a remote desktop connection.

4 Trained staff

Does the outsourcing partner have a team of people who are experienced in US accounting and taxation? Are they frequently trained? That's an essential piece of information to find out.



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5 Trial jobs

Before signing the dotted line, you could give them a small task to assess their service; check out how quickly they turnaround the work, the presentation, and the valuable add-ons (such as analysis and reporting) they offer, if at all.

6 Client references

Get a hold of some of their clients, preferably those who have a business like yours, to get a good understanding of how the outsourcing partner operates, the plus and negatives of their operations.

7 Working hours

While a quick turnaround time is excellent, if you are never able to speak to the people working on your account, the benefit of outsourcing is short-lived. Hence, enquire if they work your hours or not.

8 Commitment clarity

Outsourcing companies often offer engagement models depending on the client's business contents, nature of the project and size. Find out how the outsourcing partner wishes to work with you. Make sure you choose a model that's most convenient for you.