DNA Growth

The CPA Firm Outsourcing Readiness Assessment

10 Questions to Ask Before You Hand Off Client Work

A practical assessment for CPA firms, Fractional CFOs, and finance leaders. Score your readiness. Find the gaps. Build capacity with confidence.
Outsourced Accounting | Bookkeeping | FP&A Support



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Why Readiness Matters Before You Outsource



Outsourcing can expand capacity, but adding people does not automatically create a scalable delivery model.
The early problems are usually operational:

1

Tribal workflows

the process lives in one person's head.

2

Unclear ownership

work is completed, but nobody is clearly accountable for review.

3

Oversized first scope

too much work is handed off before a pilot is proven.

Start with a clear operating model:

Standardize › Assign ownership › Pilot › Review › Scale

Your provider matters.
Your internal readiness matters just a much.

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The 10-Question Readiness Assessment

Answer Yes or No to each question.

PROCESS

1	Is the workflow documented from intake to completion?	☐ Yes	☐ No
2	Are inputs, outputs, deadlines, and exceptions defined?	☐ Yes	☐ No

OVERSIGHT

3	Is a reviewer assigned for the workflow?	☐ Yes	☐ No
4	Is the review turnaround expectation clear?	☐ Yes	☐ No

TECHNOLOGY & ACCESS

5	Does the delivery team have approved system access?	☐ Yes	☐ No
6	Are permissions based on job responsibilities?	☐ Yes	☐ No

COMMUNICATION & SCALE

7	Is there a defined escalation path?	☐ Yes	☐ No
8	Are communication channels and response expectations clear?	☐ Yes	☐ No
9	Is the first scope narrow enough to pilot?	☐ Yes	☐ No
10	Do you have success metrics before expanding?	☐ Yes	☐ No

Your score: ___ / 10



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1. Can Someone Else Actually Follow Your Process?



If the answer is, “Sarah knows how to do it,” you do not have a scalable workflow yet.

A usable SOP should make five things clear:

- What starts the process?
- What information is required?
- What are the key steps and checkpoints?
- What does “done” look like?
- What happens when something is missing or unusual?

Good documentation does not need to be a 40-page manual. It can be a clear SOP, checklist, process map, sample workpaper, or short screen recording.

Goal:
consistency without unnecessary complexity.

2. Who reviews the work and owns the Final Output?

Outsourcing should not create a new layer of ambiguity. Before work begins, define:

WHO reviews it?
Assign a named reviewer by workflow or function.

WHAT gets reviewed?
Full review, exception-based review, or sample testing?

WHEN is it reviewed?
Set a realistic turnaround expectation.

WHO makes judgment calls?
Client-specific decisions should not be left to guesswork.

WHAT happens if the reviewer is unavailable?
Assign a backup owner.

Delivery ownership and final accountability are not always the same thing.
Clear review responsibility protects quality, turnaround times, and client trust.

3. Is Your Technology and Access Model Ready?

Giving someone a login is not an access strategy.
Before onboarding an outsourced team, define:

SYSTEMS

SYSTEMS: Which platforms are required? Examples may include QuickBooks, Xero, NetSuite, Bill.com, payroll, reporting, and document management tools.

ACCESS

Who grants and removes access?

PERMISSIONS

What can each role view, create, edit, approve, or export?

- Use role-based access wherever possible.
- Keep permissions aligned with responsibilities.
- Review access regularly and remove it when roles or engagements change.

A clear access model supports better control, cleaner onboarding, and fewer avoidable security gaps.

4. What Gets Escalated, and Are You Ready to Pilot?



A strong delivery team should not escalate evei question. It should never be forced to guess.

RESOLVE

Routine tasks covered by the SOP.

FLAG

Exceptions that need review but do not stop the workflow.

ESCALATE

Issues involving judgment, material errors, missing critical information, deadlines, compliance, or unusual transactions.

Define who receives the escalation, where it goes, what details are required, the expected response time, and the backup contact.

Pilot

Then pilot a focused workflow before expanding the scope.

Measure

turnaround time, rework, and escalation patterns.

Scale

Fix the process before you scale it.

The right questions, to the right people, at the right time, create a stronger, more scalable delivery model.

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Your Readiness Score
About DNA Growth

8–10 YES:
READY TO PILOT

Start with a focused workflow, defined ownership, and measurable success criteria.

5–7 YES:
PREP BEFORE YOU SCALE

Close gaps in documentation, review ownership, access, or communication before expanding capacity.

0–4 YES:
BUILD THE FOUNDATION FIRST

Standardize the process before handing it off.

ABOUT DNA GROWTH

DNA Growth provides CPA firms and Fractional CFO practices with flexible, white-label backend capacity across accounting, bookkeeping, FP&A, CFO support, and finance operations. We work as an extension of your team, helping you expand delivery capacity while you retain client relationships and strategic oversight.

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