FREE RESOURCE

The Complete **Automation Checklist** for Accounting Firms

50+ checkpoints · 6 critical areas · Score your firm

50+ automation checkpoints	**6** critical areas covered	**20** minutes to complete	**Free** no email required

Work through each section. Check off what you already have in place.

01

Be honest

Don't mark something done unless it actually runs without manual input. Partial automations count as gaps.

02

Check off as you go

Each checkbox = one thing your firm does automatically. If a human has to trigger, remind, or complete it — it's not checked.

03

Score yourself at the end

The final slide shows what your score means and what to do next. Most firms score between 12 and 28 on their first pass.

04

Prioritise by section

The sections are ordered by impact. Foundation and Billing gaps cost the most time. Start there.

Firm name: ______________________________ Date: ______________________ Score: ________ / 50

01 Client Intake & Onboarding

The moment a prospect becomes a client should trigger a system — not a to-do list.

9 checkpoints

INTAKE & CRM

- [ ] Standardized intake form captures all required client information in one place
- [ ] Intake form automatically creates a CRM record — no manual data entry
- [ ] New client trigger automatically sends a welcome email sequence

CONTRACTS & INVOICING

- [ ] Contract is generated and sent automatically on client sign-up
- [ ] E-signature is embedded in the contract flow — no printing or scanning
- [ ] First invoice is generated and sent automatically on contract signing

ONBOARDING WORKFLOW

- [ ] Document request list is sent automatically — not manually compiled each time
- [ ] Internal tasks are assigned automatically when a new client is added
- [ ] Client portal or shared folder is set up automatically on sign-up

02 Billing & Invoicing

Revenue leaks happen quietly — missed follow-ups, late invoices, inconsistent tracking.

9 checkpoints

RECURRING & REMINDERS

- [ ] Recurring invoices are generated and sent automatically on schedule
- [ ] Payment reminders are sent automatically at set intervals — not manually
- [ ] Overdue invoices trigger an escalation sequence without manual intervention
- [ ] Invoice data syncs automatically to QuickBooks or Xero — no double entry

TRACKING & VISIBILITY

- [ ] Payment received triggers an automatic receipt and CRM update
- [ ] Outstanding balances are visible across all clients in one view
- [ ] ACH or card payments are accepted online — clients don't need to call
- [ ] Revenue by client and service is visible without manual reporting
- [ ] Billing errors or mismatches are flagged automatically

03 Document Management

If your team is chasing documents by email, you don't have a client problem — you have a system problem.

8 checkpoints

STORAGE & ORGANISATION

- [ ] Client documents are stored in a consistent, searchable folder structure
- [ ] Documents are named and filed consistently — no manual renaming
- [ ] Sensitive documents are shared securely — not via unencrypted email
- [ ] Signed documents are stored and linked to the client record automatically

CHASE & TRACKING

- [ ] Document requests are tracked — you know what's received and what's outstanding
- [ ] Follow-up reminders for missing documents are sent automatically
- [ ] Completed documents trigger the next workflow step automatically
- [ ] Tax deadline reminders are sent to clients automatically

04 Internal Operations

Your firm shouldn't depend on one person knowing where everything stands.

9 checkpoints

TASK ASSIGNMENT

- [ ] New client tasks are automatically assigned to the right team member
- [ ] Recurring client work is automatically scheduled each cycle
- [ ] Team knows exactly what's outstanding without a status meeting
- [ ] Capacity is visible — you know who's overloaded before it's a problem

COORDINATION & SOPS

- [ ] Client status updates don't require chasing teammates
- [ ] Handoffs between team members are documented and tracked
- [ ] SOPs exist for your top 5 most repeated processes
- [ ] Onboarding a new team member doesn't depend entirely on you
- [ ] Your firm can operate for a full day without you in it

Flowtimation™

05

Reporting & Visibility

If you have to dig for it, it's not visible enough.

7 checkpoints

REVENUE & CLIENTS

- [ ] Monthly revenue is visible in real time — not calculated manually at month end
- [ ] You know which clients are most profitable without running a custom report
- [ ] At-risk clients (overdue, unresponsive, nearing renewal) are flagged automatically
- [ ] Client renewal and anniversary dates trigger automated reminders

AUTOMATION TRACKING

- [ ] Time saved by automation is tracked — you can quantify the ROI
- [ ] Monthly performance snapshot is generated automatically
- [ ] Data from all your tools is consolidated in one place

06 Client Communication & Retention

The best client relationships are proactive — not reactive.

8 checkpoints

PROACTIVE COMMUNICATION

- [ ] New clients receive an automated welcome sequence
- [ ] Clients receive proactive updates on their work — not just when they ask
- [ ] Upsell opportunities are flagged automatically based on client data
- [ ] Client satisfaction is checked at regular intervals

AFTER HOURS & FAQS

- [ ] Long-term clients receive anniversary touchpoints automatically
- [ ] Inbound enquiries are responded to within 1 hour — even after hours
- [ ] FAQ responses are automated — team isn't answering the same questions daily
- [ ] After-hours calls are captured and followed up — not missed

Count your checkmarks. Where does your firm land?

0 – 15

Critical

Significant manual work across most areas. Your firm is likely losing 15–25 hours per week to admin that should be automated. Start with Intake and Billing.

16 – 29

Developing

Some systems in place but major gaps remain. You're losing 10–15 hours per week. Closing the top 3 gaps would make an immediate difference to your capacity.

30 – 42

Operational

Solid foundation with real room to optimize. Closing the remaining gaps would free up 5–10 hours per week and improve the client experience significantly.

43 – 50

Systematized

Your firm runs on systems. Focus on the Reporting and Workflows layer — this is where you shift from efficient to truly scalable.

My score: ________ / 50 Biggest gap identified: ____

READY TO CLOSE THE GAPS?

We build exactly what's missing on this checklist.

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