

Choose the first outsourced file before choosing the volume

Blog draft | Practice operations

One clear assignment is easier to evaluate

A first assignment should answer a practical question: can the preparation team deliver work in the format your reviewer needs? Sending a large backlog before agreeing that format makes it harder to tell whether a problem comes from missing records, unclear scope or the working method.

Define the boundary

Identify the entity, period, accounts and tasks. Separate bookkeeping cleanup from tax preparation and filing. Record which prior-year questions are already known. If inventory, payroll reprocessing or additional entities are outside the assignment, say so before work begins.

Agree what complete means

A handoff might require reconciliations, a trial-balance bridge, proposed entries and an open-item log. Agree the evidence and format for each. A list of delivered files is not the same as an accepted assignment; the receiving reviewer needs a basis for deciding whether the work is usable.

Set the access rules first

The practice should know who can enter each system, which records can be processed and where working papers are retained. Required permissions and consents belong before access, not in a cleanup exercise after the work has started. Do not send sensitive records through an initial sales enquiry.

Measure the review, not just the delivery date

Record missing documents, repeat questions and the changes requested by your reviewer. Use a comparable file and a defined period if you want to measure time saved. A fast first delivery is not enough if the partner has to rebuild the schedules.

Decide the next scope from the evidence

After the first file, agree what should remain the same and what needs to change. Only then decide whether to expand to recurring work or another service. La Comptabilité's readiness checklist is designed to make those decisions explicit before the next handoff.