

The 2026 Operational Health Check for Accounting Firms

Is your firm suffering from invisible friction? This complete audit guide helps you spot bottlenecks in your document collection and deadline management.

Instructions: Use this diagnostic checklist during your internal team reviews or partner meetings to score your firm's operational friction points across client chasing, deadline management, and tech automation readiness.

1. Document Collection & Client Chasing

Objective: Evaluate the level of friction and labor cost caused by delayed client submissions.

☐ **Manual Chasing Frequency**

How many times per month does your team have to chase a single client for missing statements or invoices?
(Options: 1–2 times / 3–4 times / 5+ times)

☐ **Time Spent Per Dossier**

What is the total cumulative time spent per staff member per month running after missing client records?

☐ **Document Centralization**

Do clients upload files directly to a single automated portal, or are documents received through scattered emails, WhatsApp chats, or unorganized shared folders?

☐ **Real-Time Visibility**

Can you instantly identify which clients are late on submissions before a staff member manually audits individual folders?

2. Deadline Management & Workflow Tracking

Objective: Measure internal bottlenecks, compliance risks, and team workload distribution.

☐ **Deadline Alerts & Notifications**

Are your tax and accounting deadline reminders fully automated, or managed via static Excel spreadsheets and individual calendars?

☐ **Team Workload Distribution**

Do you have clear visibility into staff capacity bottlenecks before major filing deadlines and closing periods arrive?

☐ **Task Review & Approval Gates**

Do review and sign-off stages experience delays due to pending partner reviews or unorganized communication trails?

☐ **Bottleneck Identification**

Can you pinpoint the exact stage in your workflow where dossiers experience the longest stagnation (e.g., waiting for client input vs. internal data entry)?

3. Technology & Automation Readiness

Objective: Determine your firm's immediate potential for operational efficiency gains through software automation.

☐ **Automated Reminders**

Do you deploy automated workflows to send invoice and document reminders without human manual triggers?

☐ **CRM & Tool Integration**

Do your practice management tools and sales pipelines (such as Close CRM) communicate seamlessly with client intake portals?

☐ **Overall Administrative Burden**

Estimate the total weekly hours lost across your entire team on repetitive low-value administrative overhead.

Ready to eliminate operational friction?

Discover how SLIQ360 automates client document chasing and deadline tracking for accounting firms. Visit sliq360.com to book your personalized demo.