

Outsourcing Readiness Checklist

Use this 20-point assessment to determine if your firm or business is ready to outsource its finance & accounting function. Score yourself honestly — each YES = 1 point.

OPERATIONS & PROCESSES (7 POINTS)

- ☐ Your core accounting processes are documented
SOPs exist for bookkeeping, close, payroll
- ☐ You use cloud-based accounting software
QuickBooks Online, Xero, Zoho Books, etc.
- ☐ Month-end close takes longer than 5 business days
Common pain point outsourcing solves
- ☐ You have a backlog of unreconciled accounts
Outsourcing clears the backlog fast
- ☐ Your team handles repetitive, high-volume transactions
AP/AR processing, bank recs, payroll
- ☐ You have seasonal volume spikes you struggle to staff for
Tax season, year-end, audit prep
- ☐ You've hired and lost accounting staff in the last 2 years
Outsourcing removes hiring risk

COST & CAPACITY (6 POINTS)

- ☐ Local CPA/accountant rates feel high vs output
US: \$150-300/hr | CA: CAD 150-250/hr
- ☐ You want to reduce accounting overhead by 40%+

COMPLIANCE & MULTI-JURISDICTION (4 POINTS)

- ☐ You operate in more than one country
US + Canada, US + UAE, or similar
- ☐ Your compliance requirements span multiple jurisdictions
CRA, ATO, FTA VAT, IRS — all covered
- ☐ You need multi-entity consolidation
Group reporting across subsidiaries
- ☐ You have upcoming audit or compliance deadlines
Outsourced team can mobilise fast

READINESS MINDSET (3 POINTS)

- ☐ You're comfortable with remote/distributed teams
Same quality, different timezone
- ☐ You want a live review process, not just reports
Accounting Brains delivers both
- ☐ You're ready to start within 30-60 days
Onboarding takes 2-4 weeks

Your Score

17-20 points



Ready Now

India GDC delivers 40-60% savings



You have budget for \$1,500-\$5,000/month in services

Entry-level outsourcing engagement



Your current team is at 100% capacity

No bandwidth for new work or growth



You'd rather pay for outcomes than manage headcount

Managed model vs. dedicated hire



You've considered hiring offshore before

You're ready — you just need the right partner

12-16 points



Nearly Ready

7-11 points

Explore Further

Under 7



Not Yet