

# Choosing a Partner

Things to consider when choosing an outsourced accounting firm



<b>Experience</b>	How long has the firm provided client accounting services (CAS)?
<b>Specialization</b>	a. Do they specialize in CAS? b. Do they specialize in your accounting software c. Do they specialize in your industry?
<b>Transitioning</b>	How do they manage the on-boarding transition process, and how long will it take?
<b>Technology</b>	Are they able to build or optimize your systems to automate and integrate all your financial data?
<b>Scalability</b>	Are they able to add, or cut back on services depending on your business needs?
<b>Team</b>	What level of experience and training systems does the company have?
<b>Expertise</b>	a. How many people will be on your team? b. What are their roles? c. Do they provide a dedicated team?
<b>Reporting</b>	Do they provide a reporting package the includes management reports customized to your organization's drivers of success?
<b>U.S. Based or Offshore</b>	Offshore may work for large transaction heavy businesses focused on maximum cost savings. U.S Based is best for SMBs.
<b>Where do they work?</b>	Do their staff work in a centralized office or service center, or do they work out of their homes?
<b>Communication</b>	How do you communicate with your team? Can you reach them when you need them?
<b>Scope</b>	Can they deliver a scope of work that matches your needs? Are they flexible? Do they offer daily/real-time service in addition to batch processing?
<b>Your Responsibilities</b>	What are the responsibilities, deadlines and expectations of your staff, or any third parties, such as your CPA?
<b>Security</b>	Will your business's data be protected? (The best firms understand the importance of security. They invest and become experts in both physical and digital security.)
<b>Shared Access to Software Platform</b>	Some outsourced accounting service providers limit or restrict access to QuickBooks or other software.