Job Workflow Blueprint

1

REQUEST/RECEIVE CLIENT WORK
Engage with client + request information.
★

JOB PRE-BRIEF MEETING
All team members involved attend

JOB PRE-PLANNED / EXPECTED. START RESOURCE PLANNING
Plan + schedule staff

CLIENT INFORMATION COMES IN
CSO checks for 95% completion to known information requirements ★

YES | NO | **FOLLOW UP CLIENT** ★

2

START JOB PREP

CSO does accountability + workflow monitoring

CLEAN WORKING FINANCIAL STATEMENTS
- Client / Accountant get statements to a pre-adjustment base + Peer Review

PROCESSING + TAX ADJUSTMENTS
+ Verification Review

TAX OPTIMISING STRATEGY
+ Tax Strategy Review

3

HELICOPTER REVIEW
- Partner

JOB DEBRIEF MEETING
All team members involved attend

UPDATE WORKFLOW SCHEDULE
For Next Year

EXIT + OPPORTUNITIES MEETING
★
Client, Manager + Partner

INVOICE CLIENT
★
Ad-hoc / Overruns

LEGEND

CSO TASKS

ACCOUNTING TASKS

REVIEW TASKS

★
CUSTOMER TOUCH POINTS
Ensure these areas have smooth processes with a focus on delivering the ultimate client experience.

BLUEPRINTHQ
accelerated performance