ACCOUNTING / 01

BUILD THE ENGAGEMENT BRIEF

Give every professional the same high-level business starting point.

A helpful preparation resource from PickYourPro.ai. Fill in digitally or print. Keep your completed copy private.

Entities, locations, operating activities, and ownership or decision-makers

Why I am seeking accounting help now and the result I want

Current accounting, invoicing, payment, payroll, expense, inventory, and reporting systems

Time periods, transitions, known gaps, or changes that need professional review

People who prepare, approve, review, or use the financial information

My three priorities for the first accounting conversation

Preparation only. Not accounting, tax, legal, payroll, records-retention, or security advice.

ACCOUNTING / 02

MAP WORK AND RESPONSIBILITIES

Separate one-time work, recurring activities, reporting, and advice.

Setup, migration, opening information, or one-time cleanup to discuss

Transaction recording, categorization, reconciliation, and close responsibilities

Receivables, payables, billing, payments, expenses, and cash-tracking responsibilities

Payroll, inventory, fixed assets, outside systems, and specialist coordination questions

Financial statements, management reports, schedules, dashboards, and intended users

Advisory meetings, forecasts, decisions, referrals, exclusions, and future needs

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ACCOUNTING / 03

PREPARE RECORDS AND ACCESS QUESTIONS

Tick only what is organized or ready to discuss - not what has been uploaded.

- [ ] Every entity and requested time period is identified
- [ ] Current systems and important integrations are listed
- [ ] One-time and recurring responsibilities are separated
- [ ] Known gaps are described without guessing at a diagnosis
- [ ] Report users and requested deliverables are identified
- [ ] Client and professional task ownership is ready to discuss
- [ ] Sensitive credentials and identifiers are excluded from this worksheet
- [ ] Every professional will receive the same high-level engagement brief

Records and system access the professional may request, without passwords or sensitive identifiers

Secure sharing, user permissions, approval, backup, retention, and offboarding questions

Meeting cadence, reporting dates, decision deadlines, open items, and preferred communication

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ACCOUNTING / 04

QUESTIONS FOR THE ACCOUNTING PRO

Record how this professional would scope, operate, review, and communicate.

Scope: how are entities, periods, systems, responsibilities, exclusions, and assumptions documented?

Team: who performs and reviews the work, and who answers day-to-day questions?

Workflow: how are records requested, open items tracked, approvals handled, and work reviewed?

Security: how are sensitive documents, system access, permissions, backups, and offboarding handled?

Deliverables: what reports, schedules, meetings, timing, and client responsibilities are included?

Changes and fees: how are the full fee structure, dependencies, extra work, and transitions documented?

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ACCOUNTING / 05

COMPARE THE SAME ACCOUNTING SCOPE

Use A and B in every box. Clarify differences before choosing.

Professional A / Professional B / consultation and proposal dates

Entities, periods, systems, setup, cleanup, recurring work, and task ownership - A / B

Team, workflow, security, deliverables, review cadence, and communication - A / B

Fee structure, assumptions, exclusions, written terms, changes, and open questions - A / B

READY TO HEAR FROM PROS?

Create an account on PickYourPro.ai and start an accounting request. Share the entities, systems, current situation, requested responsibilities, reporting needs, and timing at a high level so participating pros can compete for your business with proposals. Compare engagement scope, deliverables, communication, fee structure, written terms, and fit. Share private records only through the secure process agreed with the professional.

One request. Every pro's best offer.

Start a request

Participation varies. A consultation and secure record review may be needed before a final engagement proposal.

Planning guide: https://www.pickyourpro.ai/services/accounting

U.S. Small Business Administration: Manage your business (official reference)

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