FINANCE PROCESS HANDOFF / 01

MAP ONE CURRENT FINANCE PROCESS

Use neutral labels. Keep amounts, account details, identities, credentials and private records out.

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

Process A / business purpose / start and end boundaries

Trigger or input category / source role / no private data

Current step 1 / owner role / Record A reference status

Current handoff / sender role / receiver role / question

Current output category / recipient role / timing question

Observable issue or delay / desired handoff outcome / unknown cause

Preparation only. Not accounting, tax, controls, audit, cybersecurity, software, employment, management, contract or legal advice. Keep amounts and private records out.

FINANCE PROCESS HANDOFF / 02

SEPARATE CHANGE AND IMPLEMENTATION OWNERS

Ask the professional to propose the future state. Do not design controls, systems or accounting here.

Current-state confirmation evidence the professional proposes

Future-state document or responsibility map requested

Business owner / fractional-CFO / accounting or tax role boundaries

System, access, security or data-owner questions for private review

Implementation step / proposed owner / dependency / approval role

Training, transition, exception or unresolved-item responsibility

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FINANCE PROCESS HANDOFF / 03

CHECK THE ACCEPTANCE-READY HANDOFF

Tick what is organized. These checks do not approve accounting, controls, systems, security or results.

- [ ] One process has a clear start and end boundary
- [ ] No amount, credential, identity or private record is included
- [ ] Current roles and handoffs are observations, not prescriptions
- [ ] The professional will confirm the current state
- [ ] Future-state documentation and role boundaries are requested
- [ ] Implementation dependencies and approval roles will be written
- [ ] Acceptance evidence and unresolved items will be identified
- [ ] Operating ownership, training and closeout handoff are requested

Current-state, record-reference or owner question still open

Change, dependency, approval or implementation question still open

Acceptance, training, operating-owner or closeout question still open

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FINANCE PROCESS HANDOFF / 04

QUESTIONS FOR THE FRACTIONAL CFO

Ask every professional the same current-state, change, implementation, acceptance and handoff questions.

Discovery: how will the current process and evidence be confirmed?

Future state: what process and responsibility documents will be proposed?

Scope: which design, implementation and coordination tasks are included?

Boundaries: how are specialist decisions referred and approved?

Acceptance: what evidence and owner signoff will be proposed?

Handoff: what training, open-item and operating records are delivered?

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FINANCE PROCESS HANDOFF / 05

COMPARE CHANGE AND HANDOFF SCOPE

Use Professionals A and B with the same neutral Process A brief. Clarify different boundaries before comparing proposals.

Professionals A / B / proposal references / discussion dates

Current-state confirmation and future-state documents - A / B

Roles, implementation, dependencies and approvals - A / B

Acceptance, training, operating handoff, exclusions and fit - A / B

READY TO HEAR FROM PROS?

Create an account on PickYourPro.ai only if you choose, then start a Fractional CFO request for finance-process improvement. Share a non-sensitive current-process, owner and handoff brief so participating pros can compete with proposals. Compare discovery, documentation, responsibilities, implementation, acceptance, handoff, timing and fit. A private record and engagement discussion may be needed before a final proposal.

One request. Every pro's best offer.

Start a request

Participation varies. A private record, responsibility and engagement discussion may be needed before a final proposal.

Planning guide: https://www.pickyourpro.ai/services/fractional-cfo/finance-process-improvement

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

Internal Revenue Service: Recordkeeping (official reference)

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