INDUSTRY ACCOUNTING DISCOVERY / 01

MAP THE BUSINESS MODEL

Describe how the business operates without entering amounts, identities or records.

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

Business model and operating activity / plain-language summary

Products, services or project types / neutral categories

Locations, channels or delivery models / category labels only

Operating Event A / what happens / no transaction detail

Operating Event B / what happens / no transaction detail

Industry-specific complexity or open question for discovery

Preparation only. Not accounting, tax, audit, controls, financial-reporting, retention, cybersecurity, industry-regulation or legal advice. Keep figures, identities, records and credentials out.

INDUSTRY ACCOUNTING DISCOVERY / 02

CONNECT EVENTS TO PRIVATE SOURCES

Reference source categories and owners; keep the actual systems and records in a private process.

Operating Event A / Source Category A / private location reference

Operating Event B / Source Category B / private location reference

Preparation role / review role / unresolved handoff

Source timing or frequency label / provider to confirm

Known integration or reconciliation question / no diagnosis

Private records, access or specialist review still needed

Preparation only. Not accounting, tax, audit, controls, financial-reporting, retention, cybersecurity, industry-regulation or legal advice. Keep figures, identities, records and credentials out.

INDUSTRY ACCOUNTING DISCOVERY / 03

CHECK THE DISCOVERY BRIEF

Tick what is organized. These checks do not validate records, methods or reports.

- [ ] The business model is described in plain language
- [ ] Operating events use neutral category labels
- [ ] Each source is a category or private reference only
- [ ] Preparation, review and user roles are separated
- [ ] Reports are tied to a user or decision question
- [ ] Unknowns remain questions for a qualified professional
- [ ] No figures, identities, records or credentials are included
- [ ] Every provider will receive the same discovery brief

Report User A / decision or question to support

Requested deliverable label / purpose / period to discuss

Assumption or dependency that needs private confirmation

Preparation only. Not accounting, tax, audit, controls, financial-reporting, retention, cybersecurity, industry-regulation or legal advice. Keep figures, identities, records and credentials out.

INDUSTRY ACCOUNTING DISCOVERY / 04

QUESTIONS FOR THE ACCOUNTING PRO

Record where each answer appears in the written proposal or discovery plan.

Experience: which industry patterns are relevant, and what remains to validate?

Discovery: which events, sources, roles and report users will you map first?

Team: who gathers, reviews and clarifies information?

Deliverables: how will proposed outputs and their intended users be documented?

Dependencies: which systems, specialists, assumptions or exclusions affect scope?

Private review: how will records, access, conclusions and changes be handled?

Preparation only. Not accounting, tax, audit, controls, financial-reporting, retention, cybersecurity, industry-regulation or legal advice. Keep figures, identities, records and credentials out.

INDUSTRY ACCOUNTING DISCOVERY / 05

COMPARE DISCOVERY AND FIT

Use Provider A and Provider B with the same operating-event map.

Provider A / Provider B / consultation dates / common brief

Relevant experience, discovery plan and validation questions - A / B

Source mapping, report users, team roles and deliverables - A / B

Dependencies, private review, exclusions, changes and open questions - A / B

READY TO HEAR FROM PROS?

Create an account on PickYourPro.ai only if you choose, then start a CPA & Accounting request. Share a non-sensitive operating-event, source-category and report-user brief so participating pros can compete with proposals. Compare discovery approach, relevant experience, assumptions, deliverables, responsibilities, private-review needs and fit.

One request. Every pro's best offer.

Start a request

Participation varies. A private business-model, source-system and records discussion may be needed before a final proposal.

Planning guide: https://www.pickyourpro.ai/services/accounting/industry-specific-accounting

IRS: Recordkeeping (official reference)

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

Preparation only. Not accounting, tax, audit, controls, financial-reporting, retention, cybersecurity, industry-regulation or legal advice. Keep figures, identities, records and credentials out.