



# Mini Ops Audit for Accounting Firms

Find the friction — before it  
burns out your team.

*Loosive.*



# You started your business for freedom. But right now, it feels like it runs you.

If your firm is growing but the backend feels increasingly messy, this quick audit is a calm place to start. You don't need to prep anything. You don't need any software or metrics. You don't need to impress anyone. Just use this space to think clearly about how things are really running.

In less than 30 minutes, you'll uncover where time and energy are being lost, and what to focus on next.

## PART 1: TASK REPETITION INVENTORY

# Where are you repeating work?

Let's start with the basics: are you and your team doing the same things more than once — just in different ways or tools?

### Instructions:

List 5 to 7 core tasks your firm handles regularly. Think proposals, onboarding, document requests, bookkeeping updates, monthly closes.

For each task, consider:

- Are we starting from scratch each time?
- Are we doing the same thing in different tools?
- Is more than one person doing a version of the same thing?
- Do we ever have to "go back and fix it later"?

**Look for:** Copy-paste habits, rework, "who's got the latest version?" moments. These are silent time drains.

For example:

Task	Who Handles It	Tools Used	Do We Repeat Work?	Notes
Document Request	Admin + Partner	Email, WhatsApp	Yes	Sent twice to the same client last week

### Quick Win:

If you send the same kind of email more than once a week, turn it into a reusable draft or template. You just saved 30 minutes/month.

## PART 2: HANDOFF CLARITY SCORECARD

# Are handoffs as clear as you think?

Miscommunication isn't always loud. Sometimes it just looks like hesitation, confusion, or unnecessary questions.

In a growing firm, the way tasks move between people can make or break efficiency. Let's check how clear your handoffs really are.

### Instructions:

Rate the following areas from 1 (not clear at all) to 5 (fully clear and consistent). Be honest — no one's grading this. Then, write one small improvement you could try.

Area	Clarity Score (1-5)	What Could Be Improved?
Task ownership		
When tasks shift from one person to another		
What happens when something gets stuck		
How priorities are shared each week		

*If you score below 3 in more than one area, it's likely you're wasting hours each week on avoidable miscommunication or rework.*

### Quick Win:

Try a 10-min Monday check-in: What's priority? What's blocked? What's done?

## PART 3: CORE TOOL MAPPING

# Are your tools helping — or slowing you down?

Many firms keep adding tools but don't remove the ones that aren't working. Let's step back and look at the systems you're using. Are they helping or just adding noise? Let's take inventory.

### Instructions:

For each area below, list the tool your team uses. Then give it a gut-check rating: is it actually working for you?

For example:

Function	Tool You Use	Who Uses It	Actually Helping?	Keep/Replace?
Track monthly tasks	Trello	Admin	Kind of	Might switch to Notion

**Look for:** tools that overlap, don't integrate, or nobody actually uses. These are upgrade or eliminate candidates.

### Quick Win:

Remove just one tool this week that no one really uses — or clarify what it's for. Less clutter = more focus.

# Quick Wins — Try One This Week

You've now done something most firm owners avoid: looked under the hood.

If you found just one thing to simplify, eliminate, or delegate, that's progress. If you saw five — you're not alone. The hard part is knowing where to start. The smart part is not doing it alone.

Big changes start with small wins. Try one of these this week:

- Turn your most-used client email into a reusable template
- Add a 10-minute Monday “handoff huddle” with your team
- Pick one tool to simplify or stop using
- Create a shared checklist for onboarding or month-end

These actions often save more time than expected — and help restore a sense of control.

## NEXT STEP

This audit is a start — not a solution. But clarity is always the first step toward change. Want to see how this could look across your whole firm?

Let's map it out together — no pressure, just clarity.

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