For Managed Services Accounting Firms

A self-assessment tool to
benchmark and elevate
your firm's growth journey.

The firms that scale profitably do not just work harder.
They work smarter, with intentional systems behind every client, every hire, and every hour worked.

This maturity map helps you assess where you are today and what might be holding you back from more predictable growth.

Firms that move up the maturity scale often see:

• Improved realization rates
• Higher client retention
• Faster onboarding and team ramp up
• Increased monthly recurring revenue
• Less firefighting, more focus

Use this tool to spot gaps, align your team, and build the systems that support sustainable growth instead of chaos.

[STEP 1]

For each pillar, select the level that best represents your firm. Then total your score.

Level 1 = 1 point | Level 2 = 2 points | Level 3 = 3 points

[STEP 2]

Use the scale below to identify your firm's maturity stage.

Total Score	Maturity Stage	Description
7-11	Reactive	You're still in survival mode. Your firm likely feels stretched thin. This is your call to build structure, define roles, and shift to recurring revenue.
12-16	Structured	You're on the right path and building stability. A few key changes in process, leadership clarity, and tech could unlock major gains.
17-21	Optimized	You've got the foundation to grow. Now focus on leadership development, client lifetime value, and next-stage advisory models.

[1]

Client Value Delivery

Reactive (Level 1)

Still reliant on billable hours. Value is not defined or measured.

- Over 80% of revenue comes from compliance-based work (bookkeeping, year-end, tax).

- No clear service tiers or documented scopes.

- Work is reactive and billed by the hour.

Structured (Level 2)

Exploring fixed-fee or packaged services. Advisory being offered more frequently.

- Service tiers are documented and used in over half of proposals.

- At least 30% of revenue is on recurring monthly billing.

- Scope creep is being flagged and managed manually.

Optimized (Level 3)

Pricing is value-based or subscription-based. Services are outcome-driven.

- 60%+ of clients are on standardized monthly packages that include advisory.

- Each client has a defined scope of work, a renewal plan, and an assigned account owner.

[2]

Process Discipline &
Operational Consistency

Reactive (Level 1)
High variation in client delivery. No productization of services.

- No documented workflows. Tasks are completed differently depending on who's doing them.

- Staff are trained informally (mostly shadowing). Handoffs and rework are common.

- SOPs may exist but are outdated or ignored.

Structured (Level 2)
Service delivery is becoming repeatable. Teams are moving toward consistency and repeatability.

- 5 to 10 key workflows are documented and followed by most team members.

- Playbooks are referenced during onboarding or client delivery.

- Teams meet regularly to improve execution and solve delivery breakdowns.

Optimized (Level 3)
Service is consistent, scalable, and delivered like a product.

- 80%+ of client work follows documented SOPs and delivery checklists.

- Processes are reviewed and updated quarterly based on internal feedback and client needs.

- New hires can execute with minimal shadowing thanks to clear documentation.

[3]

Tech, Data & Automation

Reactive (Level 1)
Tech adds complexity rather than clarity. Low automation or system leverage.

- Tools are used inconsistently across the team. Some work is still tracked via spreadsheets or email.

- Systems don't talk to each other. Data lives in silos.

- No dashboards. Reporting is manual and delayed.

Structured (Level 2)
Tech is being leveraged to save time and reduce admin overhead.

- Key systems are integrated (e.g., CRM to billing, task management to time tracking).

- Leadership uses dashboards or live data to track KPIs.

- Some routine work is triggered or handled automatically (e.g., email workflows, invoice creation).

Optimized (Level 3)
AI and automation are embedded. Tech fuels insights and efficiency.

- 50%+ of routine tasks are automated through tools or workflow logic.

- Dashboards are reviewed weekly for visibility into financials, capacity, and client health.

- AI or smart tools (like Dext, Ignition, ChatGPT) are used for analysis, prep, or forecasting.

[4]

Roles, Rhythm & Accountability

Reactive (Level 1)

Partner-centric. There's no leadership infrastructure.

- CEO or partners make most day-to-day decisions.

- No accountability chart. Roles and ownership are unclear.

- No consistent meeting rhythm.

Structured (Level 2)

The team is learning how to lead. Rhythm and clarity are improving.

- Accountability chart exists, and over 50% of roles have been evaluated for GWC (Get it, Want it, Capacity).

- Weekly leadership meetings occur with an agenda and KPIs.

- Some seats are owning outcomes, but escalation is still common.

Optimized (Level 3)

Leadership is distributed. Accountability is embedded in the culture.

- Every leadership seat has a scorecard with 3–5 weekly KPIs.

- Weekly, monthly, and quarterly meetings run consistently.

- Over 80% of team "GWC" their roles and own measurable outcomes.

[5]

Client Experience & Retention

Reactive (Level 1)
Clients leave quietly. Delivery varies widely.

- Onboarding is inconsistent.

- No formal client check-ins or satisfaction tracking.

- Client churn often goes unnoticed.

- The team doesn't know what success looks like from the client's perspective - tasks are completed without context.

Structured (Level 2)
Experience is becoming intentional. Retention is a metric, not a mystery.

- Onboarding follows a checklist for most clients.

- Feedback is gathered at least quarterly (surveys, reviews, check-ins).

- Churn rate is monitored and under 15%.

- The client's "why" is captured during onboarding, but it's rarely reinforced during delivery or across handoffs.

Optimized (Level 3)
The client journey is designed. Relationships drive growth.

- NPS and LTV are tracked and shared regularly.

- Playbooks exist for renewals, upsells, and proactive client check-ins.

- 80%+ of clients renew or extend services annually.

- The client's "why" is visible to the team, reviewed in standups, and reinforced in weekly outcome-based updates.

[6]

Strategic Clarity & Growth Readiness

Reactive (Level 1)

Growth happens, but it's chaotic. No long-term strategy exists.

- No documented 1-year plan or 3-year vision.

- Financials reviewed irregularly or only at year-end.

- Goals are reactive and change frequently.

Structured (Level 2)

Purpose is forming. Leadership is starting to align.

- Annual goals exist.

- Some OKRs or Rocks are defined, but not widely shared.

- Financials are reviewed monthly, but metrics don't always drive action.

Optimized (Level 3)

Growth is strategic. Planning and execution are aligned.

- A 3-year vision and annual goals are documented and shared firm-wide.

- Quarterly OKRs drive focus, cascade across teams, and progress is tracked monthly.

- Financials and operational KPIs are reviewed consistently.

[7]

Talent & Culture

Reactive (Level 1)
Culture is undefined and varies across the team. Hiring is reactive,
often based on urgency or referrals.

- No shared values or performance standards; <25% of team roles have
  defined accountabilities.

- Onboarding is inconsistent or missing; new hires receive minimal structured support.

- Expectations are unclear; evaluations are infrequent or informal.

Structured (Level 2)
The firm has started to formalize how it attracts, develops, and retains talent.

- Core values are documented and referenced in hiring and feedback; 50–75% of roles
  have scorecards.

- Onboarding is standardized for most roles, with clear 30–60–90 expectations.

- Career paths and development plans exist for at least half of the team.

- Performance is evaluated at least twice per year using consistent criteria.

Optimized (Level 3)
Culture is a strategic asset that supports firm growth and team retention.

- 90%+ of roles have defined scorecards, accountabilities, and growth paths.

- Onboarding includes peer support and role-specific training; tracked satisfaction scores.

- Culture and values are reinforced in team rhythms, recognition, and feedback loops.

- Regular evaluations (quarterly or ongoing) link individual performance to team outcomes
  and career progression.

*Footnote: Some of the ideas and concepts in this tool are inspired by the book Time's Up by Paul Dunn and Ric Payne —
an excellent resource for reimagining the future of professional services firms.*