ModernPM

ModernPM is a purpose-built platform for managing and scaling accounting firms

Go-Live Readiness Scorecard for CPA Firms

A practical pre-launch checklist for evaluating whether your firm is ready to move time, WIP, billing, receivables, permissions, and reporting into production.

Use this scorecard before your firm commits to a go-live date.

The operating chain: client → project → time → WIP → invoice → payment → receivables → reporting

Why this scorecard exists

A firm is not ready just because the software is configured. It is ready when the workflows it depends on have been tested from end to end—by the people who will actually use them.

For a CPA firm, the highest-risk areas are usually **money, time, access, and what clients see.** Use this scorecard to identify readiness gaps before they become billing delays, WIP confusion, access issues, or reporting cleanup work.

THE READINESS PRINCIPLE

Go-live should be earned, not assumed.

How to use the scorecard

1. Score each area from 0 to 2:
0 = Not tested 1 = Partially tested or workaround needed 2 = Tested and ready.

2. Involve the roles that actually own the work: operations, billing, project managers, staff, finance, approvers, administrators, and restricted users.

3. Treat any issue affecting money, time, access, or client-facing documents as a potential go-live blocker until reviewed.

4. Document owners and target dates for any unresolved item.

SUGGESTED READINESS CONVERSATION

Ask each role owner: “What would break trust if this failed in the first two weeks after go-live?” Then test that area first.

Readiness scorecard • Areas 1—5

Area	What ready looks like	Score
1. Staff and teams	Staff have been invited, teams are configured, bulk actions work, and team filters support assignment and reporting.	0 ☐ 1 ☐ 2 ☐
2. Clients and contacts	Client setup, contacts, billing settings, client groups, status restrictions, deactivation behavior, and bulk actions have been tested.	0 ☐ 1 ☐ 2 ☐
3. Projects and tasks	Project templates, billing types, recurring periods, workflow steps, task assignment, team involvement, filters, exports, and rollovers work the way your firm operates.	0 ☐ 1 ☐ 2 ☐
4. Time and timesheets	Staff can log, edit, post, and reverse time appropriately. Locked periods and team timesheet views match the firm's rules.	0 ☐ 1 ☐ 2 ☐
5. Expenses	Reimbursable and non-reimbursable expenses, approvals, uploads, negative corrections, and notifications have been tested.	0 ☐ 1 ☐ 2 ☐

Notes / owners / target dates:

Readiness scorecard • Areas 6—10

Area	What ready looks like	Score
6. Billing and invoice approvals	Time and materials, subscriptions, milestones, invoice edits, WIP through dates, credit memos, approval routes, requested changes, and unapproved permissions have been validated.	0 ☐ 1 ☐ 2 ☐
7. WIP management	Posted time appears as WIP, views reconcile, reports download, WIP can be relieved, written off, transferred, or kept according to firm policy.	0 ☐ 1 ☐ 2 ☐
8. Payments, deposits, and receivables	Payment links, auto-debit, deposits, payment allocation, partial payments, non-allocation, reversals, statements, and bulk statement workflows have been tested.	0 ☐ 1 ☐ 2 ☐
9. Permissions and restricted access	Allowed users can complete their work; restricted users are blocked from clients, projects, time, billing, WIP, receivables, deposits, expenses, staff records, and team data outside their scope.	0 ☐ 1 ☐ 2 ☐
10. Finance, reporting, and settings	Open periods, posting mode, closed periods, KPI drill-downs, reports, custom fields, rate tiers, templates, classifications, jurisdictions, notifications, and account settings have been reviewed.	0 ☐ 1 ☐ 2 ☐

Notes / owners / target dates:

Score interpretation

Total score	Interpretation	Suggested next step
0 - 10	**High launch risk**	Pause the go-live date and complete structured UAT with role owners.
11 - 16	**Moderate launch risk**	Resolve money, time, and access issues first. Document workarounds and owners.
17 - 20	**Likely ready with governance**	Confirm no blockers remain, validate end-to-end reconciliation, and complete final tester signoff.

A score of 17—20 indicates likely readiness only if no critical area is scored 0 and no S1 blockers remain.

The numerical score should never override a serious problem in one of these areas.

Critical areas:

- Time and timesheets
- Billing and invoice approvals
- WIP management
- Payments and receivables
- Permissions and restricted access
- Finance and reporting

The 5 gaps most likely to create go-live pain

Gap	Why it matters	Question to ask
Unproven time-to-cash flow	A broken handoff from time to WIP to invoice to payment can delay billing and confuse realization.	Can we trace a real sample from client setup through receivables and reporting?
Untested restricted user	Access problems are hard to clean up after launch and can create confidentiality and control concerns.	Have we tested what the restricted user cannot see or do?
Billing approvals do not match how the firm works	Invoice approval depends on the firm's real delegation model, not the vendor's default.	Do approval routes match individuals, teams, centralized billing, requested changes, and unapproval rules?
Periods and reports do not reconcile	Closed period behavior and reporting cutoffs affect finance, payroll, WIP, and period-end confidence.	Do posting modes, locked periods, KPI drill-downs, and period reports reconcile?
No shared rule for what blocks go-live	Without severity levels, launch decisions become subjective and calendar-driven.	What blocks go-live, what requires a workaround, and what can wait?

PRACTICAL REMINDER

The goal is not to test every rare scenario forever. The goal is to identify the scenarios that would hurt trust, cash flow, reporting, or client experience if they failed after launch.

Test the system the way each role uses it

A launch feels real when every role has proven its own work — not when one administrator has clicked through everything.

Role	What to prove before go-live
Firm administrator	Administration, templates, permissions, finance setup, custom fields, classifications, notifications, and account settings.
Billing admin / approver	Billing access, request approval, approve draft, unapprove rules, statements, and invoice workflows.
Biller	Invoice preparation, draft edits, comments, sending/downloading invoices, statements, and client-facing layout.
Project manager	Project creation, project teams, tasks, workflow steps, pooled work, WIP review, and team time visibility.
Staff member	Assigned tasks, time tracking, timesheets, scoped client visibility, and notifications.
Restricted staff	Restricted access needs its own test. Confirm that users can do their jobs—and cannot see or change anything outside their scope. For this part of testing, a pass often means the system said no.
Finance	Financial reports, payroll review, report periods, rate tiers, firm details, and payment settings.

THE ADVERSARIAL PERSONA

The restricted staff role is especially important. This persona exists to confirm that the system blocks actions outside the user's intended scope. In this part of UAT, a pass often means the action was prevented.

Defect severity model

Define defect severity before the launch decision is under pressure. This keeps the team focused on operational risk rather than subjective urgency.

Severity	Definition	Effect on go-live
S1 Blocker	Core flow impossible; data incorrect; wrong access granted; cannot complete task.	**Blocks go-live.**
S2 Major	Important function broken but a workaround exists.	Needs documented workaround, owner, and target fix date.
S3 Minor	Cosmetic, wording, or low-frequency edge case.	Can be deferred and noted for future updates.

MUST-PASS TESTS

Must-pass tests are workflows involving money, time, access, financial reporting, or client-facing documents. A failure in one of these areas requires resolution or explicit leadership approval before go-live.

The suggested go-live gate

- [ ] All must-pass tests have passed.
- [ ] Every remaining failure has a documented workaround, owner, and target fix date.
- [ ] No open blocker defects remain.
- [ ] Confirm that time, WIP, invoices, payments, AR, and reporting all tie out.
- [ ] Permission and access tests passed, including deliberately blocked actions.
- [ ] Invoice approval workflow has been validated for the firm's the way your firm actually works.
- [ ] All assigned testers have completed their phases and logged results.

This gate is simple on purpose. A readiness standard should be easy to understand and hard to ignore.

Readiness workshop worksheet

Use this page in an internal meeting with operations, billing, finance, administrators, and project leadership.

Discussion prompt	Notes
What are the three workflows that would cause the most disruption if they failed after go-live?	
Which role owners still need to complete UAT?	
What unresolved issues affect money, time, access, or client-facing outputs?	
Which workarounds are acceptable for launch, and who owns them?	
Can we trace a real client from project setup through time, WIP, invoice, payment, AR, and reporting without a mismatch?	
What is the final decision gate and who signs off?	

The ModernPM perspective

Configuration is not readiness.

Once practice management becomes your firm's system of record, the entire chain has to work: client → project → time → WIP → invoice → payment → AR → reporting.

ModernPM helps firms test that chain before go-live, with the people who will use it every day.

NEXT STEP

If your firm is evaluating practice management software, use this scorecard with your operations, billing, finance, and project leadership teams. The conversation will quickly reveal whether your current go-live plan is based on evidence or hope.

WANT TO PRESSURE-TEST YOUR GO-LIVE PLAN?

Bring us your completed scorecard. We'll walk through the gaps with your operations, billing, and finance leaders.

Schedule a Go-Live Readiness Review