

NEXACC

The 30-day pilot playbook

Checklist - How to run a low-risk pilot on two to three files: what to hand over, what to measure, what a pass looks like and how to hand back if it is not a fit.

For accounting, tax, bookkeeping, payroll and medical billing firms

A pilot exists to answer one question: does the delivered work meet your review standard without extra effort from your team? Keep it small, keep it measured, agree the pass criteria before it starts.

Week 0 - Before any file moves

Week 0 checklist

- ☐ Mutual NDA, non-solicitation and data-processing terms signed
- ☐ BAA signed if any client in scope handles protected health information
- ☐ Pick two or three files: one clean, one messy, one representative
- ☐ Write the scope: what we prepare, what your reviewer keeps
- ☐ Agree the close calendar and the review checkpoint dates
- ☐ Set up named access in your systems with the minimum role required

Week 1 - Intake and baseline

- ☐ Kickoff call with the named preparer and reviewer on our side
- ☐ Baseline recorded: current close day, current preparation hours per file
- ☐ Prior-period workpapers shared as the format reference
- ☐ Open-items log started - issues surfaced, never silently fixed

Week 2 - First delivery

- ☐ First close package delivered in your template
- ☐ Your reviewer marks it up as they would for internal staff
- ☐ Review notes counted and categorised: format, judgement, error
- ☐ Turnaround measured from intake to review-ready

Week 4 - Decision

- ☐ Second cycle delivered with the first round of notes applied
- ☐ Compare against the pass criteria agreed in week 0
- ☐ Decide: scale, extend the pilot, or hand back
- ☐ If handing back: complete file returned, access revoked, no exit fee

Suggested pass criteria

- ☐ Delivered on the agreed close day for both cycles
- ☐ Review notes fall to format-level only by the second cycle
- ☐ No client contact from us at any point unless you invited it

- [] Preparation hours on your side reduced by the amount you scoped for
 - [] Your reviewer would put the second delivery in front of a client
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Talk it through

A 30-minute fit call, no deck: what is backing up, which client profiles you would hand over, and what a pilot on two or three files would cost.

Book a fit call: <https://www.nexacc.com/schedule>

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