

CHECKLIST

The Total Control Checklist for Bookkeepers

How much of your firm are you actually in control of?

Could you tell a client exactly who accessed their books last week? Could you revoke a contractor's access in under a minute? Could you prove your offshore team never downloaded sensitive data? If any of those give you pause, this checklist is for you. Check off what's in place today and see exactly where your firm stands.

YOUR RESULTS

13-14 CHECKED Total Control

Your firm runs the way it should. Access is clean, credentials are locked down, and your team isn't burning time on problems that shouldn't exist. Review quarterly to stay there.

9-12 CHECKED Almost Airtight

The foundation is solid, but the few gaps that remain are probably costing you more time and headspace than you realize. Go back to the unchecked items. You're closer than you think!

5-8 CHECKED Cracks in the Foundation

You're in the middle of the pack, which means you already know what good looks like. The firms that move from here to the top tier aren't doing anything heroic. They're just closing the gaps one at a time. Pick the item that's been on your mind the longest and start there.

0-4 CHECKED Time to Take Back Control

Right now, your systems are creating more problems than they're solving. The good news is that none of these fixes are complicated, and the payoff is immediate. Choose 2-3 items that would be most beneficial to your firm to get started.

CREDENTIALS

Do you know who can log in?

- Credentials are stored in a centralized vault—not in emails, spreadsheets, or Slack threads.
- Team members can log into client platforms without seeing the actual password.
- All credential access is logged and auditable.
- Access can be revoked instantly when a team member leaves or a project ends.

ONBOARDING & OFFBOARDING

Does someone still have access?

- New team members receive role-based access, not manual credential sharing.
- Offboarding removes access across all apps in a single action.
- You can confirm, right now, that no former contractors have active access to client systems.

OFFSHORE & OUTSOURCED STAFF

Can you control what they can access?

- Offshore and outsourced team members work inside a secure cloud environment.
- No client data is downloaded to local or personal devices.
- You have activity logs you could show a client if they asked who accessed their data.

SAAS STACK

Who has access to what?

- You have a current list of every app your team uses.
- You have a current list of every person with access to each app.
- MFA is enforced across all apps, not just your primary accounting platform.
- Access is reviewed and pruned at least once per quarter.

Now you know your gaps. We can help you fix them.

Tech shouldn't be another thing to manage. Rightworks takes tech off your plate so you can spend more time on clients.

