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CHECKLIST

Accounting Software Change Readiness Checklist

A practical checklist to help Australian small businesses decide whether they are ready to review or change their accounting setup and workflow.

BEFORE YOU START

This is a readiness review, not a product comparison. A software recommendation should follow discovery and the workflow requirements, and specialist cybersecurity work sits outside this resource.

1. What problem are we actually trying to solve?

Changing software fixes a workflow problem only when the workflow problem has been named. Start there.

- [ ] Write down the specific frustration, in plain terms.
- [ ] Note who feels it and how often.
- [ ] Note what has already been tried.

2. Current file condition

- [ ] Check whether the current file is current, reconciled and understood.
- [ ] Note any legacy structures or workarounds nobody can explain.

WATCH FOR

Moving an untidy file into new software usually moves the untidiness with it. Decide what gets cleaned up first.

3. Reporting needs

- [ ] List the reports the business genuinely uses.
- [ ] Note who reads them and what decision each one supports.
- [ ] Note anything currently rebuilt by hand each month.

4. Payroll and compliance dependencies

- [ ] Note whether payroll is in scope for the change.
- [ ] Note the reporting obligations the current process supports.

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- [ ] Confirm with your registered adviser what a change would affect on their side.

5. Connected applications

- [ ] List every connected app and the job it does.
- [ ] Note which ones would need to move, change or stop.

> WHAT TO CHECK
>
> An available integration is not an automatic recommendation. The question is whether the app earns its place in the workflow.

6. Document capture and approvals

- [ ] Note how source documents reach the file today.
- [ ] Note where approvals happen and how they are recorded.

7. User access and permissions

- [ ] List current users and the access each one needs going forward.
- [ ] Plan multifactor authentication where it is supported.
- [ ] Plan how old access will be removed after the change.

8. Historical data and conversion scope

- [ ] Decide how much history needs to move, and why.
- [ ] Decide what stays accessible in the old system, and for how long.
- [ ] Agree who checks that the converted balances make sense.

9. Internal owner of the change

Changes without an internal owner tend to stall halfway. One person needs to hold the decisions and the timeline.

10. Training needs

- [ ] Identify who needs training and on which tasks.
- [ ] Focus on the work people actually do, not the whole product.

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11. Testing and handover

- [ ] Agree what will be tested before the business relies on the new setup.
- [ ] Agree what a completed handover looks like, in writing.

12. Post-implementation review

- [ ] Set a point to review whether the original problem is actually solved.
- [ ] Note anything still being done manually, and decide what to do about it.

NEXT STEP

If you cannot yet answer the first question in this list, that is the discovery conversation to have before any product decision.

WHAT NEXT?

If a change looks likely, discovery first tends to save the most time and money. If you would like help working through this, we can talk through where your numbers are now and what would help most. Book a free introductory call at www.loveyournumbers.com.au/contact.

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